



OPERATIONS AND REAL ESTATE
COMMITTEE MEETING
OCTOBER 18, 2023



BOARD OF COMMISSIONERS

Gabriel Lopez
Chair

Gilbert Casillas
Vice Chair

Dalia Contreras
Commissioner

Estrellita Garcia-Diaz
Commissioner

Janet Garcia
Commissioner

Leilah Powell
Commissioner

Vincent Robinson
Commissioner

PRESIDENT & CEO

Ed Hinojosa, Jr.

OPERATIONS AND REAL ESTATE COMMITTEE MEETING OR SPECIAL BOARD MEETING

1:00 p.m. | Wednesday | October 18, 2023

If this meeting becomes a Special Board Meeting, at least four Commissioners will be physically present at this location 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.

CITIZENS TO BE HEARD

2. **Citizens to be Heard** at approximately 1:00 p.m. (may be heard after this time) Citizens wishing to speak on any issues, including ones not related to items posted on the agenda, should personally request to be placed on the Citizens to be Heard roster prior to 12:45 p.m. Citizens will be given up to three minutes to speak. Each citizen will be permitted to speak only once. A Spanish/English translator will be available to citizens needing translation.

Now is the time for Citizens to be Heard. 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 Citizens to be Heard portion of the agenda.

PUBLIC HEARING

3. Public hearing regarding Resolution 6398, authorizing the amendments to the proposed 2023-2024 Moving To Work (MTW) Agency Plan, including revisions to the MTW Plan, the Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan (ADMIN PLAN), Capital Fund Program Plan, Five-Year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action Plan (Richard Milk, Planning Officer)

PRESENTATION

4. Strategic Housing Implementation Plan (SHIP) Update (City of San Antonio)

INDIVIDUAL ITEMS

5. Consideration and appropriate action regarding Resolution 6398, authorizing the amendments to the proposed 2023-2024 Moving To Work (MTW) Agency Plan, including revisions to the MTW Plan, the Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan (ADMIN PLAN), Capital Fund Program Plan, Five-Year Capital

Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action Plan (Richard Milk, Planning Officer)

6. Consideration and appropriate action regarding Resolution 6399, authorizing the expenditure of additional funds for temporary and contract personnel services for an amount not to exceed \$750,000 (George Ayala, Director of Procurement; Aiyana Longoria, Director of Human Resources)
7. Consideration and appropriate action regarding Resolution 6400, authorizing the award of contracts for architectural, engineering, and forensic consulting services to Able City, LLC (DBE, HABE, MBE, SBE, WBE), AG Associates Architects (HABE, HUB), Alamo Architects, Inc., Durand Hollis Rupe (DBE, ESBE, HABE, MBE, SBE), KCI Technologies, Inc., Madeline Anz Slay Architecture LLC dba Slay Architecture (DBE, SBE, WBE), Sprinkle Co Architects, LLC (ESBE, SBE); and Terracon Consultants, Inc., not to exceed an annual cumulative amount of \$3,000,000; for a period of one year with the option to renew up to four additional one-year terms (George Ayala, Director of Procurement; Hector Martinez, Director of Construction Services and Sustainability)

DISCUSSION ITEMS

8. Update and discussion regarding the FY2022 MTW Report (Richard Milk, Planning Officer)
9. Update and discussion regarding a Decade of Demographics (Richard Milk, Planning Officer; Sara Eaves, Assistant Director of Policy, Planning, and Data Governance)
10. Update and discussion regarding Equity, Diversity, and Inclusion (Jeneise Briggs, Director of Diversity, Equity, and Inclusion)
11. Updated and discussion regarding Customer Service (Jo Ana Alvarado, Director of Innovative Technology; Kristen Carreon, Director of Operations Support)

CLOSED SESSION

12. 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).

- Discussion with attorney regarding properties overseen by Asset Management
- Discussion with attorney regarding developer agreements terms and conditions

REPORT

- Procurement Activity Report

RESOURCE

- Schedule of Units Under Development

13. Adjournment

Posted on: 10/13/2023 01:00 PM

*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.

These committee meetings may become special board meetings if a quorum of the Board attends. No final action is contemplated at these meetings.

“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.”



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Public Notice of Public Hearing Regarding the Opportunity Home San Antonio Proposed Amendments to the Proposed 2023-2024 MTW Agency Plan

Take notice that a 30-day public comment period

began on Monday, October 2, 2023, and ends on Wednesday, November 1, 2023, on Opportunity Home San Antonio’s Proposed Amendments to the proposed 2023–2024 Moving to Work Agency Plan, including MTW Plan, Public Housing Admissions and Continued Occupancy Plan, Housing Choice Voucher Administrative Plan, Capital Fund Program Plan, and the Family Self-Sufficiency (FSS) Program Action Plan.

Comments on changes may be delivered by electronic mail to mtw@homesa.org. All comments are due by 5:00 pm on November 1, 2023.

Take notice that a public hearing will be held at Opportunity Home San Antonio, 818 S. Flores St., San Antonio, TX, 78204, commencing on October 18, 2023, to consider and act upon items shown on the attached agenda.

Documents are available for viewing online at www.homesa.org.

DATED: October 2, 2023

Housing Authority of the City of San Antonio, Texas

Muriel Rhoder

73853D8CC711474...

Ed Hinojosa, Jr. | President and CEO

Opportunity Home San Antonio

Attachment

OPPORTUNITY HOME SAN ANTONIO ACCESSIBILITY STATEMENT

Meeting site is accessible to handicapped persons. Accessible parking is located at 818 S. Flores St., San Antonio, TX, 78204

Member of National Association of Housing and Redevelopment Officials
Member of Public Housing Authorities Directors Association
Member of Council of Large Public Housing Authorities
Equal Housing Opportunity



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PUBLIC HEARING

1:00 p.m. | Wednesday | October 18, 2023

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PROPOSED AMENDMENT TO THE PROPOSED 2023-2024 MOVING TO WORK AGENCY PLAN AND PUBLIC HOUSING LEASE UPDATES

1. Introduction and background (Richard Milk, Planning Officer)
2. Proposed Amendment to the proposed 2023-2024 Moving to Work Agency Plan (Richard Milk, Planning Officer)
 - Moving to Work Plan
3. Public Comments/Feedback
4. Summary and Next Steps (Richard Milk, Planning Officer)

Posted on: 10/02/2023 01:00 PM

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FY2024 Amendment Plan 1

The FY 2023-2024 MTW Plan Amendment

Proposal and supporting documents are planned to be submitted to HUD for approval on November 2, 2023.

Once approved, Opportunity Home San Antonio intends to implement it immediately.

Proposed Amendment

The organization is proposing amendments to one existing MTW activity.

FY2011-1e: Preservation and Expansion of Affordable Housing

Background

Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional purposes providing that the activities meet the requirements of the MTW statute and comply with PIH 2011-45.

The organization began utilizing its MTW fund authority for housing development efforts in FY2014 once the organization executed an RHF amendment and RHF Plan that was approved by HUD. In FY2016, this activity was revised for FY2016 to refocus on the use of MTW funds to preserve or expand affordable housing units without any Section 8 or Section 9 subsidy.

Proposed Amendment

- The organization is proposing to rename this activity to FY2011-1e | Local, Non-Traditional Uses of MTW Funds to reflect the broader use authority authorized by Attachment D and described in further detail in PIH 2011-45.
- The organization is proposing to amend this activity to include a new local, non-traditional use category of "Service Provision only". The amendment will also allow the organization to use MTW funds under this use category for future services only initiatives.
- The organization is proposing one new metrics to correspond to this new use.

See Section III: Proposed Activities attached for detailed redlines to the FY 2023-2024 MTW Plan.



SECTION III: PROPOSED ACTIVITIES (AMENDED)

FY2011-1e | ~~Preservation and Expansion of Affordable Housing~~ Local, Non-Traditional Uses of MTW Funds

A. Activity Description

~~Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional units providing that the activities meet the requirement of the MTW statute. While the organization has had the authority to utilize this flexibility since 2011, the Agency has not utilized it for the construction of new units; all development reported under this activity in past years occurred outside the scope of MTW as it used other funding sources, including tax credits, HOME funding, CDBG and other local and state funding.~~

~~The organization began utilizing this ability to fund local, non-traditional units in combination with a new flexibility to combine replacement housing factor (RHF) funds with the MTW block grant; the Agency executed an RHF amendment and RHF Plan that was approved by HUD in FY2014.~~

~~This activity operationalizes the expansion policies adopted in FY2011 by utilizing the local, non-traditional unit authorization under the organization's broader uses of funds authority and securing the approval to combine RHF funds into the MTW block grant, which requires the Agency to construct new affordable units (defined as units reserved for households with income at or below 80% AMI).~~

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

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

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



- Under Opportunity Home’s broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional purposes providing that the activities meet the requirement of the MTW statute and comply with PIH 2011-45. This activity covers two broader uses of funds:
 - Housing Development Programs and
 - Service Provision
- The organization may use its authority for the following:
 - Housing Development: Since 2011, the organization has leveraged MTW fungibility to acquire, renovate, and/or build units that are not public housing or housing choice voucher units.
 - The organization maintains an affordable housing portfolio, Beacon Communities, and continues to evaluate and make investments in these properties as needed as part of an agency-wide preservation effort.
 - Service Provision (Households Receiving Local, Non-Traditional Service Only): Beginning in FY2024, the organization will be utilizing its authority to provide services for low-income residents that are not also receiving housing assistance.

B. Activity Metrics Information

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Changes to Metrics	Changes to Data Collection
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	None	None

Data Source: Internal development tracking.

HC #2: Units of Housing Preserved



Unit of Measurement	Baseline	Benchmark	Changes to Metrics	Changes to Data Collection
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity (number).	Expected housing units preserved after implementation of the activity (number).	None	None

Data Source: Internal preservation tracking.

Households Receiving Local, Non-Traditional Service Only

This metric corresponds to Section 2 LNT Services only reporting.

Unit of Measurement	Baseline	Benchmark	Changes to Metrics	Changes to Data Collection
Average number of households per month receiving services at the child care center (excludes households in Public Housing and Voucher Programs)	0	[enter anticipated enrollment]	None	None

Data Source: Data Sharing Agreement with the partner

C. Cost Implications

The organization plans to invest funds under this activity as outlined in Section V.A.iv. Planned Application of PHA Unspent Operating Fund and HCV Funding:

- Alazan Phase I and Predevelopment Costs - \$17 million
- Investment in MTW units at Tax Credit/Beacon Properties - \$9.5 million
- Balance of Snowden Development Funding Gap - \$6.5 million
- Investment in Midcrowne and Ravello Properties - \$5 million
- Acquisition of additional interest in a Tax Credit Property - \$5 million
- Additional Impact of Compensation Study - \$2.4 million
- Alazan Future Phases - \$5.7 million



- Building Readiness for Child Care centers - \$3 million
- Additional Investment in the 100 Labor Street Project - \$2.5 million
- Preservation of Affordable Housing - \$2 million

D. Need/Justification for MTW Flexibility

Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional uses providing that the activities meet the requirement of the MTW statute and comply with PIH 2011-45.

The organization has identified a critical local need for affordable childcare not only for residents who are residing at our properties or utilizing a voucher but for other low income families who we are not currently able to serve through our housing inventory. As such, the organization has developed a partnership that will allow the organization to use MTW funds to support a new affordable child care center that is available only to households making 80% or below AMI. The center will be available to households currently receiving housing assistance as well as those who are not and making 80% AMI or below.

E. Rent Reform/Term Limit Information

Not Applicable.



RESOLUTIONS AND CERTIFICATIONS

TO BE COMPLETED AFTER THE PUBLIC COMMENT PERIOD

This section includes the Agency's resolutions, certifications, and other documentation requirements as required by HUD Form 50900: Elements of Annual MTW Plan for the Proposed Amendment.

1. Board Resolution
2. Public posting materials
3. Operations Committee materials
4. Public comment documentation



PUBLIC COMMENT DOCUMENTATION

TO BE COMPLETED AFTER THE PUBLIC COMMENT PERIOD



ESPAÑOL

Año Fiscal 2024 Plan de Enmienda 1

La Propuesta de Enmienda al Plan MTW Año Fiscal AF2023-2024 y los documentos de apoyo se presentaron a HUD para su aprobación el 6 de octubre de 2023.

Una vez aprobado, Opportunity Home San Antonio se propone aplicarlo inmediatamente.

Modificación Propuesta

La organización propone modificaciones a una actividad existente de MTW.

AF2011-1e: Conservación y Ampliación de Viviendas Asequibles

Antecedentes

Bajo la autoridad de usos más amplios de fondos de Opportunity Home, Anexo D, la Agencia puede utilizar fondos de MTW para fines locales, no tradicionales, siempre y cuando las actividades cumplan con los requisitos del estatuto MTW y cumplan con PIH 2011-45.

La organización comenzó a utilizar su autoridad sobre los fondos MTW para sus esfuerzos de desarrollo de vivienda en el año fiscal 2014, una vez que la organización firmó una enmienda RHF y un Plan RHF que fue aprobado por HUD. En el año fiscal 2016, se revisó esta actividad para volver a centrarse en el uso de los fondos MTW para conservar o ampliar las unidades de vivienda asequibles sin ningún subsidio de la Sección 8 o la Sección 9.

Modificación Propuesta

- La organización propone cambiar el nombre de esta actividad a FY2011-1e |Usos locales no tradicionales de los fondos MTW para reflejar la autoridad de uso más amplia autorizada por el Anexo D y descrita con más detalle en PIH 2011-45.
- La organización propone modificar esta actividad para incluir una nueva categoría de uso local no tradicional de "Service Provision only". La modificación también permitirá a la organización utilizar fondos MTW bajo esta categoría para futuras iniciativas únicamente de prestación de servicios.
- La organización propone uno nuevo indicadores que correspondan a este nuevo uso.

Consulte la Sección III: Actividades propuestas adjuntadas para ver las líneas rojas detalladas del Plan MTW del año fiscal 2023-2024.



SECCIÓN III: ACTIVIDADES PROPUESTAS (MODIFICADAS)

Año Fiscal 2011-1e | ~~Conservación y expansión de la vivienda asequible de usos locales, no tradicionales de los fondos MTW~~

A. Descripción de la Actividad

~~Bajo la autoridad más amplios de uso de fondos de Opportunity Home, Anexo D, la Agencia puede utilizar los fondos de MTW para unidades locales no tradicionales, siempre y cuando las actividades cumplan con los requisitos del estatuto de MTW. Mientras que la organización ha tenido la autoridad para utilizar esta flexibilidad desde 2011, la Agencia no lo ha utilizado para la construcción de nuevas unidades; todo el desarrollo reportado bajo esta actividad en los últimos años se produjo fuera del ámbito de MTW, ya que utilizó otras fuentes de financiamiento, incluyendo créditos fiscales, fondos de HOME, CDBG y otros fondos locales y estatales.~~

~~La organización comenzó a utilizar esta capacidad para financiar unidades locales atípicas en combinación con una nueva flexibilidad para combinar los fondos del factor de sustitución de viviendas (RHF, según sus siglas en inglés) con la subvención global MTW; la Agencia firmó una modificación RHF y un Plan RHF que fue aprobado por HUD en el año fiscal 2014.~~

~~Esta actividad pone en práctica las políticas de expansión adoptadas en el ejercicio 2011 utilizando la autorización de unidades locales atípicas en el marco de la autoridad de usos más amplios de fondos de la organización y obteniendo la aprobación para combinar los fondos RHF en la subvención global MTW, lo que requiere que la Agencia construya nuevas unidades asequibles (definidas como unidades reservadas para hogares con ingresos iguales o inferiores al 80% AMI).~~

~~Aunque la organización puede desarrollar nuevas comunidades con unidades a precio de mercado además de unidades asequibles, esta actividad no autoriza el uso de fondos MTW (incluyendo los fondos RHF) para el desarrollo de esas unidades a precio de mercado.~~

~~Es importante tener en cuenta la flexibilidad de la organización para construir nuevas unidades de la Sección 8 o 9 que están autorizadas bajo la flexibilidad de un sólo fondo de MTW, y esos resultados se informan en la sección Fuentes y Usos de Fondos de este informe (Sección V). Las únicas unidades autorizadas bajo esta actividad Año Fiscal 2011-1e son las reservadas para los hogares con ingresos iguales o inferiores al 80% AMI que no reciben fondos de la Sección 8 o 9.~~

~~Esta actividad se revisó para el Año Fiscal 2016. El texto que describe el contexto, los antecedentes y el proceso de la Política de Conservación y Ampliación se pasó al Apéndice 3. Si bien el lenguaje de la Política de Conservación y Ampliación puede proporcionar un telón de fondo útil para los objetivos del Año Fiscal 2011-1e, también puede distraer el uso específico de~~



~~la flexibilidad MTW. El lenguaje en el Año Fiscal 2011 se centra ahora en el uso de los fondos MTW para conservar o ampliar las unidades de vivienda asequible sin ningún tipo de subsidio de la Sección 8 o Sección 9. Dado que no está prevista la conservación de unidades que no sean de la Sección 8 o 9 para el Año Fiscal 2016, el indicador "HC #2: Units of Housing Preserved" (Unidades de Vivienda Conservadas) se ha fijado en un valor de referencia de 0 (cero):~~

- Bajo la autoridad de usos más amplios de fondos de Opportunity Home, Anexo D, la Agencia puede utilizar los fondos MTW para fines locales no tradicionales, siempre y cuando las actividades cumplan con los requisitos de los estatutos MTW y cumplan con PIH 2011-45. Esta actividad cubre dos usos más amplios de los fondos:
 - Programas de desarrollo de vivienda y
 - Prestación de servicios
- La organización puede utilizar su autoridad para lo siguiente:
 - Desarrollo de vivienda: Desde 2011, la organización ha aprovechado la fungibilidad de MTW para adquirir, renovar y / o construir unidades que no son de vivienda pública ni unidades de vales de elección de vivienda.
 - La organización mantiene una cartera de viviendas asequibles, Beacon Communities, y sigue evaluando y realizando inversiones en estas propiedades según sea necesario como parte de su esfuerzo de conservación en toda la agencia.
 - Prestación de servicios (hogares que reciben únicamente servicios locales no tradicionales): A partir del año fiscal 2024, la organización utilizará su autoridad para prestar servicios a residentes de bajos ingresos que no sólo reciban ayuda de vivienda.



B. Información sobre los indicadores de actividad

HC #1: Unidades adicionales de vivienda disponibles

Unidad de Medida	Básico	Punto de Referencia	Cambios a los indicadores	Cambios en la recopilación de datos
Número de nuevas viviendas disponibles para hogares con un AMI igual o inferior al 80% como resultado de la actividad (aumento). Si las unidades llegan a un tipo específico de hogares, indíquelo en esta casilla.	Vivienda de este tipo antes de la ejecución de la actividad (número). Este número puede ser cero.	Viviendas de este tipo esperadas tras la ejecución de la actividad (número).	Ninguno	Ninguno

Fuente de datos: Seguimiento interno del desarrollo.

HC #2: Unidades de vivienda conservadas

Unidad de Medida	Básico	Punto de Referencia	Cambios a los indicadores	Cambios en la recopilación de datos
Número de viviendas conservadas para hogares con un AMI igual o inferior al 80% que, de otro modo, no estarían disponibles (aumento). Si las unidades se destinan a un tipo específico de hogares, indíquelo en esta casilla.	Viviendas conservadas antes de la ejecución de la actividad (número).	Viviendas que se espera conservar tras la ejecución de la actividad (número).	Ninguno	Ninguno

Fuente de datos: Seguimiento interno de la conservación.



Hogares que sólo reciben servicios locales no tradicionales

Esta métrica corresponde a los informes de los Servicios LNT de la Sección 2 únicamente.

Unidad de Medida	Línea Base	Punto de Referencia	Cambios a los Indicadores	Cambios en La Recopilación de Datos
Promedio de hogares al mes que reciben servicios en la guardería (excluidos los hogares de los programas de vivienda pública y vales)	0	[introduzca la inscripción prevista]	Ninguno	Ninguno

Fuente de datos: Acuerdo de intercambio de datos con el socio

C. Implicaciones económicas

La organización tiene previsto invertir fondos en el marco de esta actividad como se indica en la sección V.A.iv. Aplicación Prevista del Fondo Operativo No Utilizado de la PHA y de los fondos del programa HCV:

- Alazan Fase I y costos de predesarrollo - 17 millones
- Inversión en unidades MTW en Créditos Fiscales/Propiedades Beacon - 9.5 millones
- Saldo del déficit de financiación del desarrollo de Snowden - 6.5 millones
- Inversión en las propiedades Midcrowne y Ravello - 5 millones
- Adquisición de una participación adicional en un inmueble de crédito fiscal - 5 millones
- Impacto adicional del estudio de compensación - 2.4 millones
- Fases Futuras de Alazan - 5.7 millones de dólares
- Preparación del edificio para los centros de atención infantil - 3 millones
- Inversión adicional en el proyecto 100 Labor Street - 2.5 millones
- Conservación de viviendas asequibles - 2 millones

D. Necesidad/Justificación para la flexibilidad MTW

Bajo la autoridad de usos más amplios de fondos de Opportunity Home, Anexo D, la Agencia puede utilizar fondos MTW para usos locales atípicos, siempre y cuando las actividades cumplan con el requisito del estatuto MTW y cumplan con PIH 2011-45.



La organización ha identificado una necesidad local crítica de guardería asequible no sólo para los residentes que residen en nuestras propiedades o tienen vales de elección, sino para otras familias de bajos ingresos que actualmente no tenemos la capacidad de servir a través de nuestro inventario de viviendas. Como tal, la organización ha desarrollado una asociación que le permitirá a la organización utilizar los fondos MTW para apoyar un nuevo centro de atención infantil asequible que esté disponible sólo para los hogares con un AMI del 80% o menos. El centro estará disponible para los hogares que actualmente reciben asistencia de vivienda, así como aquellos que no pero que tienen un AMI del 80% o menos.

E. Reestructuración de las rentas/Información sobre los plazos

No aplica.

RESOLUCIONES Y CERTIFICACIONES

SE LLENARÁ DESPUÉS DEL PERÍODO DE COMENTARIOS PÚBLICOS

Esta sección incluye las resoluciones, certificaciones y otros requisitos de documentación de la Agencia, tal y como lo exige el formulario 50900 del HUD: Elementos del plan anual MTW para la enmienda propuesta.

1. Resolución del Consejo
2. Materiales de difusión pública
3. Materiales del Comité de Operaciones
4. Documentación de comentarios públicos



Documentación de comentarios públicos


SE LLENARÁ DESPUÉS DEL PERÍODO DE COMENTARIOS PÚBLICOS




OPPORTUNITY HOME SAN ANTONIO

October 18, 2023

**BOARD OF COMMISSIONERS
Operations and Real Estate Committee Meeting****RESOLUTION 6398, AUTHORIZING THE AMENDMENTS TO THE PROPOSED 2023-2024 MOVING TO WORK (MTW) AGENCY PLAN, INCLUDING REVISIONS TO THE MTW PLAN, THE PUBLIC HOUSING ADMISSIONS AND CONTINUED OCCUPANCY POLICY (ACOP), THE HOUSING CHOICE VOUCHER ADMINISTRATIVE PLAN (ADMIN PLAN), CAPITAL FUND PROGRAM PLAN, FIVE-YEAR CAPITAL IMPROVEMENT AND DEVELOPMENT PLAN, AND THE FAMILY SELF-SUFFICIENCY (FSS) PROGRAM ACTION PLAN**

DocuSigned by:

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Ed Hinojosa, Jr.
 President and CEO

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Richard Milk
 Planning Officer

REQUESTED ACTION:

Public hearing, consideration, and appropriate action regarding Resolution 6398, authorizing the amendments to the proposed 2023-2024 Moving to Work (MTW) Agency Plan, including revisions to the MTW Plan, the Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan (Admin Plan), the Capital Fund Program Plan, the five-year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action plan.

SUMMARY:

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

The 2023-2024 MTW Plan was originally submitted to HUD on April 15, 2023. The organization submitted the final revised proposed plan on September 8, 2023, and the plan is currently under review. The Agency is seeking an amendment to an existing activity through an expedited review process.

I. Proposed Amendments to FY2011-1e: Preservation and Expansion of Affordable Housing

Background: Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional purposes providing that the activities meet the requirements of the MTW statute and comply with PIH 2011-45.

The organization began utilizing its MTW fund authority for housing development efforts in FY2014 once the organization executed an RHF amendment and RHF Plan that was approved by

HUD. In FY2016, this activity was revised to refocus on the use of MTW funds to preserve or expand affordable housing units without any Section 8 or Section 9 subsidy.

Proposed Amendment

- The organization is proposing to rename this activity to FY2011-1e | Local, Non-Traditional Uses of MTW Funds to reflect the broader use authority authorized by Attachment D and described in further detail in PIH 2011-45.
- The organization is proposing to amend this activity to include a new local, non-traditional use category of “Service Provision only”. The amendment will also allow the organization to use MTW funds under this use category for future services only initiatives.
- The organization is proposing one new metric to correspond to this new use.

STRATEGIC OUTCOMES:

Supports all strategic outcomes.

ATTACHMENTS:

Resolution 6398
MTW Plan Amendment 1
Presentation

**Opportunity Home San Antonio
Resolution 6398**

RESOLUTION 6398, AUTHORIZING THE AMENDMENTS TO THE PROPOSED 2023-2024 MOVING TO WORK (MTW) AGENCY PLAN, INCLUDING REVISIONS TO THE MTW PLAN, THE PUBLIC HOUSING ADMISSIONS AND CONTINUED OCCUPANCY POLICY (ACOP), THE HOUSING CHOICE VOUCHER ADMINISTRATIVE PLAN (ADMIN PLAN), CAPITAL FUND PROGRAM PLAN, FIVE-YEAR CAPITAL IMPROVEMENT AND DEVELOPMENT PLAN, AND THE FAMILY SELF-SUFFICIENCY (FSS) PROGRAM ACTION PLAN

WHEREAS, the Board of Commissioners of Opportunity Home San Antonio, a public instrumentality created pursuant to the laws of the State of Texas (“SAHA”) must approve the 2023-2024 Moving to Work (MTW) Agency Plan for fiscal year 2023-2024, including the revised MTW Plan, Public Housing Admissions and Continued Occupancy Policy (ACOP), the Housing Choice Voucher Administrative Plan (Admin Plan), the Capital Fund Program, and the Family Self-Sufficiency (FSS) Program Action plan; and

WHEREAS, the Board of Commissioners of Opportunity Home San Antonio also desires to authorize the submission of the 2023-2024 MTW Agency Plan to the U.S. Department of Housing and Urban Development (“HUD”); and

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

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

- 1) Approves Resolution 6398, authorizing the amendments to the proposed 2023-2024 Moving to Work (MTW) Agency Plan, including revisions to the MTW Plan, the Public Housing Admissions and Continued Occupancy Plan (ACOP), the Housing Choice Voucher Administrative Plan (Admin Plan), Capital Fund Program Plan, five-year Capital Improvement and Development Plan, and the Family Self-Sufficiency (FSS) Program Action Plan; and
- 2) Authorizes the Chair and President and CEO to execute and submit such certifications and other documents as necessary for the submission of the 2023-2024 MTW Plan to HUD.

Passed and approved the 1st day of November 2023.

Attested and approved as to form:

Gabriel Lopez

Chair, Board of Commissioners

Ed Hinojosa, Jr.

President and CEO

FY2024 Amendment Plan 1

The FY 2023-2024 MTW Plan Amendment

Proposal and supporting documents are planned to be submitted to HUD for approval on November 2, 2023.

Once approved, Opportunity Home San Antonio intends to implement it immediately.

Proposed Amendment

The organization is proposing amendments to one existing MTW activity.

FY2011-1e: Preservation and Expansion of Affordable Housing

Background

Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional purposes providing that the activities meet the requirements of the MTW statute and comply with PIH 2011-45.

The organization began utilizing its MTW fund authority for housing development efforts in FY2014 once the organization executed an RHF amendment and RHF Plan that was approved by HUD. In FY2016, this activity was revised for FY2016 to refocus on the use of MTW funds to preserve or expand affordable housing units without any Section 8 or Section 9 subsidy.

Proposed Amendment

- The organization is proposing to rename this activity to FY2011-1e | Local, Non-Traditional Uses of MTW Funds to reflect the broader use authority authorized by Attachment D and described in further detail in PIH 2011-45.
- The organization is proposing to amend this activity to include a new local, non-traditional use category of "Service Provision only". The amendment will also allow the organization to use MTW funds under this use category for future services only initiatives.
- The organization is proposing one new metrics to correspond to this new use.

See Section III: Proposed Activities attached for detailed redlines to the FY 2023-2024 MTW Plan.



SECTION III: PROPOSED ACTIVITIES (AMENDED)

FY2011-1e | ~~Preservation and Expansion of Affordable Housing~~ Local, Non-Traditional Uses of MTW Funds

A. Activity Description

~~Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional units providing that the activities meet the requirement of the MTW statute. While the organization has had the authority to utilize this flexibility since 2011, the Agency has not utilized it for the construction of new units; all development reported under this activity in past years occurred outside the scope of MTW as it used other funding sources, including tax credits, HOME funding, CDBG and other local and state funding.~~

~~The organization began utilizing this ability to fund local, non-traditional units in combination with a new flexibility to combine replacement housing factor (RHF) funds with the MTW block grant; the Agency executed an RHF amendment and RHF Plan that was approved by HUD in FY2014.~~

~~This activity operationalizes the expansion policies adopted in FY2011 by utilizing the local, non-traditional unit authorization under the organization's broader uses of funds authority and securing the approval to combine RHF funds into the MTW block grant, which requires the Agency to construct new affordable units (defined as units reserved for households with income at or below 80% AMI).~~

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

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

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



- Under Opportunity Home’s broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional purposes providing that the activities meet the requirement of the MTW statute and comply with PIH 2011-45. This activity covers two broader uses of funds:
 - Housing Development Programs and
 - Service Provision
- The organization may use its authority for the following:
 - Housing Development: Since 2011, the organization has leveraged MTW fungibility to acquire, renovate, and/or build units that are not public housing or housing choice voucher units.
 - The organization maintains an affordable housing portfolio, Beacon Communities, and continues to evaluate and make investments in these properties as needed as part of an agency-wide preservation effort.
 - Service Provision (Households Receiving Local, Non-Traditional Service Only): Beginning in FY2024, the organization will be utilizing its authority to provide services for low-income residents that are not also receiving housing assistance.

B. Activity Metrics Information

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Changes to Metrics	Changes to Data Collection
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	None	None

Data Source: Internal development tracking.

HC #2: Units of Housing Preserved



Unit of Measurement	Baseline	Benchmark	Changes to Metrics	Changes to Data Collection
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity (number).	Expected housing units preserved after implementation of the activity (number).	None	None

Data Source: Internal preservation tracking.

Households Receiving Local, Non-Traditional Service Only

This metric corresponds to Section 2 LNT Services only reporting.

Unit of Measurement	Baseline	Benchmark	Changes to Metrics	Changes to Data Collection
Average number of households per month receiving services at the child care center (excludes households in Public Housing and Voucher Programs)	0	[enter anticipated enrollment]	None	None

Data Source: Data Sharing Agreement with the partner

C. Cost Implications

The organization plans to invest funds under this activity as outlined in Section V.A.iv. Planned Application of PHA Unspent Operating Fund and HCV Funding:

- Alazan Phase I and Predevelopment Costs - \$17 million
- Investment in MTW units at Tax Credit/Beacon Properties - \$9.5 million
- Balance of Snowden Development Funding Gap - \$6.5 million
- Investment in Midcrowne and Ravello Properties - \$5 million
- Acquisition of additional interest in a Tax Credit Property - \$5 million
- Additional Impact of Compensation Study - \$2.4 million
- Alazan Future Phases - \$5.7 million



- Building Readiness for Child Care centers - \$3 million
- Additional Investment in the 100 Labor Street Project - \$2.5 million
- Preservation of Affordable Housing - \$2 million

D. Need/Justification for MTW Flexibility

Under Opportunity Home's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional uses providing that the activities meet the requirement of the MTW statute and comply with PIH 2011-45.

The organization has identified a critical local need for affordable childcare not only for residents who are residing at our properties or utilizing a voucher but for other low income families who we are not currently able to serve through our housing inventory. As such, the organization has developed a partnership that will allow the organization to use MTW funds to support a new affordable child care center that is available only to households making 80% or below AMI. The center will be available to households currently receiving housing assistance as well as those who are not and making 80% AMI or below.

E. Rent Reform/Term Limit Information

Not Applicable.



RESOLUTIONS AND CERTIFICATIONS

TO BE COMPLETED AFTER THE PUBLIC COMMENT PERIOD

This section includes the Agency's resolutions, certifications, and other documentation requirements as required by HUD Form 50900: Elements of Annual MTW Plan for the Proposed Amendment.

1. Board Resolution
2. Public posting materials
3. Operations Committee materials
4. Public comment documentation



PUBLIC COMMENT DOCUMENTATION

TO BE COMPLETED AFTER THE PUBLIC COMMENT PERIOD



MTW Plan 2023-2024

Proposed Amendments

TIMELINE

MTW Amendment

FY2024 MTW Plan Approval Update

The previously Board-approved FY2024 MTW Plan is still pending HUD approval.

- Submitted on April 14, 2023
- 1st HUD Response received on June 20, 2023
- Response to HUD with plan redlines submitted on July 10, 2023
- 2nd HUD Response received on Aug. 29, 2023
- Response to HUD with no plan changes submitted on Sept. 8, 2023

- Oct. 2 - Nov. 1: 30-day Public Comment Period
- Oct. 18: Public Hearing during Operations and Real Estate Committee Meeting
- Nov. 1: Consideration and appropriate action by Board of Commissioners
- Nov. 2: Submission to HUD
- Nov. - Dec.: Address HUD questions
- Jan. 1: Implement amendments

Proposed Amendments

FY2011-1e

Activity requires no regulatory waivers.

Since 2011, activity has reflected Opportunity Home's broader uses of funds authority as authorized by Attachment D of the organization's MTW Agreement.

Current amendments are intended to provide further clarity and transparency in reporting.

- Rename to reflect the broader use authority authorized by Attachment D and described in further detail in PIH 2011-45.
 - Change from *Expansion and Preservation of Affordable Housing* to:
Local, Non-Traditional Uses of MTW Funds
- Addition of new local, non-traditional use category of "Service Provision only".
- One new metric

TODAY

Next Steps

Comments are due on Nov. 1, 2023.

- Email comments to: mtw@homesa.org
- Mail comments to:
ATTN: Policy & Planning
818 S. Flores St. | San Antonio, TX 78204
- Submit comments online:
homesa.org/public-notices
- All documents can be found at
homesa.org/public-notices.

- Oct. 2 - Nov. 1: 30-day Public Comment Period
- Oct. 18: Public Hearing during Operations and Real Estate Committee Meeting
- Nov. 1: Consideration and appropriate action by Board of Commissioners
- Nov. 2: Submission to HUD
- Nov. - Dec.: Address HUD questions
- Jan. 1: Implement amendments

Questions?




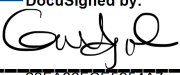
OPPORTUNITY HOME SAN ANTONIO

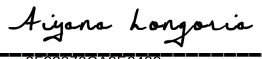
October 18, 2023

**BOARD OF COMMISSIONERS
Operations and Real Estate Committee Meeting**

RESOLUTION 6399, AUTHORIZING THE EXPENDITURE OF ADDITIONAL FUNDS FOR TEMPORARY AND CONTRACT PERSONNEL SERVICES FOR AN AMOUNT NOT TO EXCEED \$750,000

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Ed Hinojosa, Jr.
President and CEO

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George Ayala
Director of Procurement

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Aiyana Longoria
Director of Human Resources

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6399, authorizing the expenditure of additional funds for temporary and contract personnel services for an amount not to exceed \$750,000.

SUMMARY:

Opportunity Home received Board approval on October 4, 2018 (Resolution 5841) authorizing the award of seven contracts for temporary and contract personnel services for a period of one year with the option to renew up to four additional one-year terms. The board-approved term for this award expired on October 4, 2023.

In order to meet the ongoing needs of the organization, utilizing Contracting Officer approval authority, the term of three contracts for this service have been extended through February 15, 2024. We currently have 25 temporary employees working at the organization through these agencies. The contract extensions allow for the time required by the agencies, which varies from 480 to 520 hours, to convert the individual(s) from temporary employee to full-time. We are requesting your approval for the expenditure of additional funds in the amount of \$750,000 to cover the contract(s) extension period and to bring in new temporary employees, if they are needed and are not able to be provided by the agencies awarded contracts at the September 6, 2023 Board meeting.

Additionally, on June 15, 2023, Opportunity Home issued RFP #2305-5407 for temporary and contract personnel services that closed on July 5, 2023. Board approval was received on September 6, 2023 (Resolution 6366), authorizing the award of contracts to four agencies for a period of one year with the option to renew up to four additional one-year terms and not to exceed an annual cumulative amount of \$2,000,000. Opportunity Home requires the services of additional agencies to meet the organization's ongoing needs for this service. Procurement will be issuing an RFP for this service and anticipates presenting a new award recommendation at the January 2024 Operations and Real Estate Committee Meeting and February 2024 Regular Board Meeting.

STRATEGIC OUTCOME:

Opportunity Home staff thrive in career and professional work.

OPPORTUNITY HOME SAN ANTONIO

October 18, 2023

ATTACHMENTS:

Resolution 6399

Procurement Process

**Opportunity Home San Antonio
Resolution 6399**

RESOLUTION 6399, AUTHORIZING THE EXPENDITURE OF ADDITIONAL FUNDS FOR TEMPORARY AND CONTRACT PERSONNEL SERVICES FOR AN AMOUNT NOT TO EXCEED \$750,000

WHEREAS, Opportunity Home received Board approval on October 4, 2018 (Resolution 5841) authorizing the award of seven contracts for temporary and contract personnel services for a period of one year with the option to renew up to four additional one-year terms. The board-approved term for this award expired on October 4, 2023; and

WHEREAS, in order to meet the ongoing needs of the organization, utilizing the Contracting Officer's approval authority, the term of three contracts for this service have been extended through February 15, 2024; and

WHEREAS, we are requesting your approval for the expenditure of additional funds in the amount of \$750,000 to cover the contract(s) extension period and to bring in new temporary employees, if they are needed.

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

- 1) Approves Resolution 6399, authorizing the expenditure of additional funds for temporary and contract personnel services for an amount not to exceed \$750,000.
- 2) Authorizes the President, CEO, or designee to execute all necessary documents and extensions.

Passed and approved the 1st day of November 2023.

Gabriel Lopez
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

Temporary and Contract Personnel Services

Procurement Process

Procurement Process

Expenditure of Additional Funds

Opportunity Home received Board approval on Oct. 4, 2018 (Resolution 5841), authorizing the award of seven contracts for temporary and contract personnel services for a one-year period with the option to renew for up to four additional one-year terms. The board-approved term for this award expired on Oct. 4, 2023.

- In order to meet the ongoing needs of the organization, utilizing Contracting Officer approval authority, the terms of three contracts for this service have been extended through Feb. 15, 2024.
- We currently employ 25 temporary employees through these agencies. The contract extensions accommodate the time required by the agencies, ranging from 480 to 520 hours, to convert these individuals from temporary employees to full-time.
- We are requesting your approval for the expenditure of additional funds in the amount of \$750,000 to cover the extension period of the contracts and to bring in new temporary employees, if needed.

Procurement Process


Financial Impact

The requested increase in funding for this service is up to **\$750,000**.

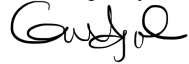
Award includes Temporary and Contract Personnel Services

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023****BOARD OF COMMISSIONERS
Operations and Real Estate Committee Meeting**

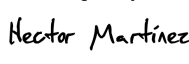
RESOLUTION 6400, AUTHORIZING THE AWARD OF CONTRACTS FOR ARCHITECTURAL, ENGINEERING AND FORENSIC CONSULTING SERVICES TO ABLE CITY, LLC (DBE, HABE, MBE, SBE, WBE), AG ASSOCIATES ARCHITECTS (HABE, HUB), ALAMO ARCHITECTS, INC., DURAND HOLLIS RUPE (DBE, ESBE, HABE, MBE, SBE), KCI TECHNOLOGIES, INC., MADELINE ANZ SLAY ARCHITECTURE LLC DBA SLAY ARCHITECTURE (DBE, SBE, WBE), SPRINKLE CO ARCHITECTS, LLC (ESBE, SBE), AND TERRACON CONSULTANTS, INC., NOT TO EXCEED AN ANNUAL CUMULATIVE AMOUNT OF \$3,000,000; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE YEAR TERMS

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Ed Hinojosa, Jr.
President and CEO

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George Ayala
Director of Procurement

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Hector Martinez
Director of Construction
Services and Sustainability

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6400, authorizing the award of contracts for architectural, engineering, and forensic consulting services to Able City, LLC (DBE, HABE, MBE, SBE, WBE), AG Associates Architects (HABE, HUB), Alamo Architects, Inc., Durand Hollis Rupe (DBE, ESBE, HABE, MBE, SBE), KCI Technologies, Inc., Madeline Anz Slay Architecture LLC dba Slay Architecture (DBE, SBE, WBE), Sprinkle Co Architects, LLC (ESBE, SBE); and Terracon Consultants, Inc., not to exceed an annual cumulative amount of \$3,000,000; for a period of one year with the option to renew up to four additional one-year terms.

SUMMARY:

Opportunity Home requires professional firms to provide architectural, engineering, and forensic consulting services for various organization projects that may include: comprehensive modernization of public and affordable housing properties for both single and multi-family; site improvements including driveways, sidewalks, site lighting, landscape, site security, storm water, and amenities; moderate rehabilitation of single and multi-family properties for the creation of energy efficient green communities; design work- architectural and structural upgrades to the interior and exteriors of various buildings at a variety of properties; roofing at various properties; rehabilitation of fire, water, mold, and wind damaged properties; upgrades of playgrounds; renovation of single family homes to address structural, electrical, plumbing, and other defects; property assessments and/or forensic evaluations of structural, electrical, plumbing, or other defects in commercial, single, or multi-family housing structures and improvement; construction cost estimating; and contract administration and project management services for construction projects.

PROCUREMENT PROCESS:

On April 20, 2023, Opportunity Home issued a "Request For Qualifications" (RFQ) #2302-5372 for architectural, engineering, and forensic consulting services, which closed on May 19, 2023. The RFQ was published on Opportunity Home's E-Procurement Website, the Hart Beat, and

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023**

directly solicited to 899 vendors. A total of 10 proposals were received in response to this solicitation, with one being deemed non-responsive: Able City, LLC (DBE, HABE, MBE, SBE, WBE); AG Associates Architects (HABE, HUB); Alamo Architects, Inc.; Durand Hollis Rupe (DBE, ESBE, HABE, MBE, SBE); Lundy Franke Engineering (SBE, WBE); KCI Technologies, Inc.; Humberto Saldana and Associates, Inc., dba Saldana Architects (DBE, ESBE, HABE, MBE, SBE); Madeline Anz Slay Architecture, LLC dba Slay Architecture (DBE, SBE, WBE); Sprinkle Co Architects, LLC (ESBE, SBE); and Terracon Consultants, Inc. The proposals were evaluated on the following criteria: relevant experience, competency, project approach, financial ability, and strength of the Section 3 and SWMBE plans. Staff are recommending contract awards to the eight highest-rated proposers.

On August 2, 2023, Opportunity Home received Board approval (Resolution 6365) authorizing the award of contracts for architectural and engineering services to two firms for a period of one year with the option to renew up to four additional one-year terms and not to exceed an annual cumulative amount of \$1,000,000. Opportunity Home has determined that the initial award for architecture, engineering, and forensic consulting services is inadequate to meet the organization's needs. Staff is requesting approval to increase the number of awarded firms and the annual cumulative amount approved for these services to \$3,000,000. This approval will amend and supplement Resolution 6365 and those awards made to the firms under the President and CEO's expanded approval authority.

COMPANY PROFILES:

Able City, LLC was founded in 2017 and is headquartered in San Antonio, Texas with field office locations in El Paso, Laredo, and McAllen, Texas. This vendor has been certified as a DBE, HABE, MBE, SBE, and WBE by the South Central Texas Regional Certification Agency. They are an architectural and urban design firm specializing in developing and designing many publicly-funded and commercial-building projects, master plans, and assessments. They have developed projects with a variety of needs such as, but not limited to, housing, educational facilities, site design, commercial/retail, mixed-use, transit developments, landscaping development, LEED design, office facilities, federal facilities, and public facilities. Able City has worked with Housing Authorities, including Brownsville Housing Authority, Laredo Housing Authority, and Mission Housing Authority.

AG Associates Architects was founded in 1996 and is headquartered in San Antonio, Texas. This vendor self-certifies as a HABE and has been certified as a HUB by the State of Texas. They are a full-service architectural firm providing services in the areas of architecture, needs analysis, facility programming, master planning, space planning, site feasibility/selection/planning, interior design, technology planning, construction administration, and post-construction warranty services. AG Associates has worked with housing authorities including Carrizo Springs Housing Authority, Corpus Christi Housing Authority, Eagle Pass Housing Authority, and Pearsall Housing Authority.

Alamo Architects, Inc. was established in 1984 and is headquartered in San Antonio, Texas. They are a multidisciplinary firm specializing in institutional, educational, multifamily, and retail architecture, as well as urban planning. They have experience in a wide variety of housing project types, including urban mid-rise and mixed-use, garden style, high-rise retrofit, historic adaptive use, missing middle, attached townhomes, and single-family detached. They have experience in rehabilitation and modernization projects and forensic analysis of historic properties, as well as

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023**

the requirements associated with major funding sources, including historic tax credits, low-income housing tax credits, HUD financing, and COSA Bond requirements. They have worked with Housing Authorities including Beaumont Housing Authority and Forth Worth Housing Authority. Their client list includes COSA Neighborhood & Housing Services, San Antonio Housing Trust Foundation, and Franklin Development.

Durand-Hollis Rupe (DHR) was established in 1986 and is headquartered in San Antonio, Texas. This firm has been certified as a DBE, ESBE, HABE, MBE, and SBE by the South Central Texas Regional Certification Agency. They are a full-service architectural, interior design, and planning firm. They provide a full spectrum of services, including but not limited to architecture, interior design, urban planning, master planning, project management, facility assessments, graphics and renderings, 3D visual presentations, and virtual reality services. DHR services industries include education, commercial, government, industrial, medical, municipalities, parks and recreation, retail, hospitality, religious, and detention facilities. Their client list includes the Bexar County Housing Authority and the San Antonio Development Agency.

KCI Technologies, Inc. was established in 1955 and is headquartered in Sparks, Maryland. They have 55 field offices operating in 19 states with offices located throughout Texas in San Antonio, Austin, Cedar Park, College Station, Dallas, Houston, Mission Laredo, and Wylie. They are a multi-disciplined professional engineering and architectural design firm offering: mechanical, electrical, and plumbing (MEP) engineering; fire protection; site/civil engineering, structural engineering, utility engineering, and subsurface utility engineering (SUE); communications infrastructure; architectural design; and construction management. KCI has worked with Housing Authorities to include Galveston Housing Authority, Housing Authority of Baltimore City, City of High Point Housing Authority, Houston Authority of City of Annapolis, Town of Easton Housing Authority, and Dauphin County Housing Authority. Their client list includes Bexar County, City of San Antonio, Department of Transportation, Texas Facilities Commission, Texas Health and Human Services Commission, San Antonio Water System, and school districts to include Northside Independent School District, Southwest Independent School District, San Antonio Independent School District, and Northeast Independent School District.

Madeline Anz Slay Architecture LLC, dba Slay Architecture, was founded in 2022 and is headquartered in San Antonio, Texas, with a field office location in Laredo, Texas. Slay Architecture has been certified as a DBE, SBE, and WBE by the South Central Texas Regional Certification Agency. They are a full-service firm offering a wide range of services, from conceptual design through post-construction management for new construction, renovation, addition, and adaptive use projects. They service industries to include government, education, hospitality, commercial, medical and institutional, retail, residential, and historic preservation. Slay Architecture has worked with housing authorities to include the Laredo Housing Authority. Their client list includes but is not limited to Bexar County, City of Austin, City of Balcones Heights, City of San Antonio, City of Garden Ridge, City of Laredo, Habitat for Humanity, St. Peter - St. Joseph Children's Home and Emergency Shelter, San Isidro Ranch, University of Texas at San Antonio, and VIA Metropolitan Transit.

Sprinkle Co Architects, LLC was established in 2006 and is headquartered in San Antonio, Texas. This firm has been certified as an ESBE and SBE by the South Central Texas Regional Certification Agency. They provide architectural and interior design services for a wide variety of building types including municipal, institutional, religious, commercial, industrial, and

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023**

residential. Their client list includes the City of San Antonio, Credit Human, Fairmont Hotel, La Familia Cortez Restaurants, Maldonado Landscaping and Nursery, Silo Elevated Cuisine, and UT Health.

Terracon Consultants, Inc. was founded in 1965 and is headquartered in Olathe, Kansas. They have 175 offices nationwide, with 24 offices located throughout Texas, including an office in San Antonio. They are a multi-discipline firm specializing in professional services related to modernization, site improvements, moderate rehabilitation of multi-family properties, design work, structural deficiencies, rehabilitation of fire water, unknown substance, wind-damaged properties, land surveying, assessments and/or forensic evaluations, renovation of utility systems, estimating, and code analysis. Terracon's Housing Authority clients include, but are not limited to, Laredo Housing Authority, Houston Housing Authority, Dallas Housing Authority, Edinburg Housing Authority, Galveston Housing Authority, and Hidalgo County Housing Authority. Their client list includes City of San Antonio, Port San Antonio, Alamo Community Colleges, and Del Mar College.

PRIOR AWARDS:

Able City, LLC has received a prior award from Opportunity Home for Master Planner for the Redevelopment of the Alazan Courts and performed satisfactorily under the awarded contract.

AG Associates Architects has received prior awards from Opportunity Home for architecture and engineering services and has recently been awarded a contract for architecture, engineering, and forensic consulting services under the President and CEO's expanded approval authority. The firm has performed satisfactorily under their awarded projects.

Alamo Architects, Inc. has received prior awards from Opportunity Home for architecture and engineering services and architecture and related services for the Alazan Expansion. They have performed satisfactorily under the awarded contracts.

Durand-Hollis Rupe has received prior awards from Opportunity Home for architectural and engineering services, architectural and commissioning services for Victoria Plaza Modernization, and architectural, engineering, and forensic consulting services under the President and CEO's expanded approval authority. They have performed satisfactorily under the awarded contracts.

KCI Technologies, Inc. has received prior awards from Opportunity Home for professional engineering services and has performed satisfactorily under their awarded contracts.

Madeline Anz Slay Architecture LLC, dba Slay Architecture, has received no prior awards from the organization.

Sprinkle Co Architects, LLC has received prior awards from Opportunity Home for architectural and engineering services and has received a recent award for architecture, engineering, and forensic consulting services under the President and CEO's expanded approval authority and has performed satisfactorily under the awarded contracts.

Terracon Consultants, Inc. is currently under contract with Opportunity Home to provide environmental and professional engineering services and is performing satisfactorily under the

OPPORTUNITY HOME SAN ANTONIO

October 18, 2023

awarded contracts.

CONTRACT OVERSIGHT:

Contract oversight will be provided by Hector Martinez, Director of Construction Services and Sustainability, who will monitor the vendor's adherence to contract requirements and performance.

STRATEGIC OUTCOMES:

Opportunity Home residents live in quality affordable housing.

Opportunity Home residents feel safe.

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

ATTACHMENTS:

Resolution 6400

Scoring Matrix

Procurement Process

**Opportunity Home San Antonio
Resolution 6400**

RESOLUTION 6400, AUTHORIZING THE AWARD OF CONTRACTS FOR ARCHITECTURAL, ENGINEERING, AND FORENSIC CONSULTING SERVICES TO ABLE CITY, LLC (DBE, HABE, MBE, SBE, WBE), AG ASSOCIATES ARCHITECTS (HABE, HUB), ALAMO ARCHITECTS, INC., DURAND HOLLIS RUPE (DBE, ESBE, HABE, MBE, SBE), KCI TECHNOLOGIES, INC., MADELINE ANZ SLAY ARCHITECTURE LLC DBA SLAY ARCHITECTURE (DBE, SBE, WBE), SPRINKLE CO ARCHITECTS, LLC (ESBE, SBE), AND TERRACON CONSULTANTS, INC., NOT TO EXCEED AN ANNUAL CUMULATIVE AMOUNT OF \$3,000,000; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE YEAR TERMS

WHEREAS, on April 20, 2023, Opportunity Home issued a “Request For Qualifications” (RFQ) #2302-5372 for Architectural, Engineering, and Forensic Consulting Services, which closed on May 19, 2023; and

WHEREAS, ten (10) proposals were received in response to this solicitation. One was deemed non responsive; and

WHEREAS, on August 2, 2023, Opportunity Home received Board approval (Resolution 6365) authorizing the award of contracts for architectural and engineering services to two firms for a period of one year with the option to renew up to four additional one-year terms and not to exceed an annual cumulative amount of \$1,000,000; and

WHEREAS, Opportunity Home has determined that the initial award for architecture, engineering, and forensic consulting services is inadequate to meet the organization's needs. Staff is requesting approval to increase the number of awarded firms and the annual cumulative amount approved for these services to \$3,000,000. This approval will amend and supplement Resolution 6365 and those awards made to the firms under the President and CEO’s expanded approval authority.

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

- 1) Approves Resolution 6400, authorizing the award of contracts for architectural, engineering, and forensic consulting services to Able City, LLC (DBE, HABE, MBE, SBE, WBE), AG Associates Architects (HABE, HUB), Alamo Architects, Inc., Durand Hollis Rupe (DBE, ESBE, HABE, MBE, SBE), KCI Technologies, Inc., Madeline Anz Slay Architecture LLC dba Slay Architecture (DBE, SBE, WBE), Sprinkle Co Architects, LLC (ESBE, SBE); and Terracon Consultants, Inc., not to exceed an annual cumulative amount of \$3,000,000; for a period of one year with the option to renew up to four additional one-year terms.
- 2) Authorizes the President, CEO, or designee to execute all necessary documents and

extensions.

Passed and approved the 1st day of November 2023.

Gabriel Lopez
Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.
President and CEO

Scoring Summary

2302-5372 - Architectural, Engineering and Forensic Consulting Services

		Total	Relevant Experience	Competency	Project Approach	Financial Ability	Strength of the Respondent's Section 3 Program Utilization Plan	Strength of the Respondent's S/W/MBE Utilization Statement
	Supplier	/ 100 pts	/ 35 pts	/ 25 pts	/ 20 pts	/ 10 pts	/ 5 pts	/ 5 pts
1	Terracon Consultants, Inc.	93.33	35	23.33	18.67	9.333	3	4
2	Alamo Architects	87	35	23.33	17.33	9.333	0	2
3	KCI Technologies, Inc.	87	35	23.33	17.33	9.333	0	2
4	Slay Architecture	78	30.33	20	16	8.667	0	3
5	Able City	75.67	28	20	17.33	5.333	0	5
6	AG ASSOCIATES ARCHITECTS	70.67	28	18.33	13.33	6	0	5
7	Durand-Hollis Rupe, Inc.	67.33	25.67	18.33	13.33	8	0	2
8	Sprinkle & Co Architects	66.33	23.33	18.33	13.33	7.333	0	4
9	SALDANA ARCHITECTS	61.67	18.67	16.67	13.33	8	0	5

Architectural, Engineering, and Forensic Consulting Services

Procurement Process

Procurement Process

Solicitation Process

On April 20, 2023, Opportunity Home issued a “Request for Qualifications” (RFQ) #2302-5372 for **Architectural, Engineering, and Forensic Consulting Services**, which closed on May 19, 2023.

RFP was published on multiple websites

Directly solicited to 899 vendors

Ten responses were received, with one deemed non-responsive

Evaluation criteria included:

- Relevant Experience
- Competency
- Project Approach
- Financial Ability
- Strength of the Section 3 and SWMBE Plans

Staff is recommending contract awards to the **eight** highest-rated responsive and responsible proposers: Able City, LLC, AG Associates Architects, Alamo Architects, Inc., Durand Hollis Rupe, KCI Technologies, Inc., Madeline Anz Slay Architecture, LLC dba Slay Architecture, Sprinkle & Co. Architects, LLC, and Terracon Consultants, Inc.

Procurement Process

Financial Impact

The current award recommendation for Architectural, Engineering, and Forensic Consulting Services is not expected to exceed an annual cumulative amount of **\$3,000,000**.

Award includes Architectural, Engineering, and Forensic Consulting Services.

This approval will amend and supplement Resolution 6365 and the awards made to firms under the President and CEO's expanded approval authority.

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023****MEMORANDUM**

TO: Operations and Real Estate Committee

FROM: Ed Hinojosa, Jr., President and CEO

PRESENTED BY: Richard Milk, Planning Officer

RE: Update and discussion regarding the FY2022 MTW Report

DS
EHJ

SUMMARY:

The U.S. Department of Housing and Urban Development (HUD) requires Moving to Work (MTW) Public Housing Authorities (PHAs) to annually submit an MTW Report detailing progress on MTW Activities and other items. Opportunity Home submitted the latest MTW Report on September 29, 2023, to cover fiscal year 2023.

FY 2021-2022 MTW Report

HUD collects MTW Report information using Form HUD 50900 (OMB Approval No. 2577-0216).

Ongoing Activities

Opportunity Home has implemented activities under one of the three MTW Statutory Objectives: cost-efficiency/effectiveness (CE), housing choice (HC), and self-sufficiency (SS). The following summary lists ongoing activities, with the MTW objective, status, and a short update.

	MTW Activity	Objective	Status	Update
1	11-1e- Preservation and Expansion of Affordable Housing	HC	On track	12 properties preserved (1,724 out of 1,841 affordable at 80% AMI and below)
2	11-9- Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services	HC	Behind plan	285 households served in partnership with CHC, SAMM, and SARAH out of 340 allocated vouchers. Median tenure is 2.8 years.
3	13-4- HQS Inspection of Opportunity Home-owned non-profits by Opportunity Home inspectors	CE	On track	Estimated savings of over \$50,000 through self-inspection process.
4	14-3- Faster Implementation of Payment Standard Decreases (HCV)	CE	Waiver not used	*Only used when SAFMRs decrease during the year.
5	14-6- HCV Rent Reform	CE	Behind plan	Estimated savings of over \$70,000 due to streamlining. Still experiencing elevated error rates during rent calculations.

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6	15-2- Elderly Admissions Preference at Select Public Housing Sites	HC	On track	Across 4 properties, 73% of occupied units are occupied by older populations.
7	15-3- Modified Project Based Vouchers	HC	On track	No new MPBV commitment per plan. Continue to offer income-based rents at lower AMI levels than upper AMI occupancy limits.
8	19-1- Local Implementation of Small Area FMRs	HC	Behind plan	Voucher holders continue to move to groups 4-10 at higher rates. Shifts in geographic distribution indicate households are accessing more areas. Continue to see low success rates and high searching days across all groups.
9	19-2- Alternative Recertification Process	CE	Behind plan	Estimated savings over \$500,000 due to three year recertification schedules. Continue to see elevated error rates during recertification file processing.
10	20-1- College & University Homeless Assistance Program	HC	Behind plan	36 of out the 50 committed vouchers were utilized by students.
11	21-1- Next Step Housing Program (THRU Project)	HC	Behind plan	5 out of the 20 committed vouchers were utilized by youth.
12	21-2- Limiting increase in rents	HC	Preparing to close	Temporary rent cap has been removed. Limit in rental increases remains. Operations will explore closing out; rental increase limits would remain under an alternative existing activity.
13	22-1- Opportunity Home Partnerships Providing Basic Needs for Residents Through Income Exclusions	HC	Behind plan	Over \$2.7 million leveraged for food assistance. 11,494 households out of a target of 18,000 were reached
14	23-1- Property-based local, non-traditional rental subsidy program (referred to locally as PH-like)	HC	Preparing to implement	Preparing to implement a new program at Snowden once construction is completed.

Closed Activities

In FY2023, the organization has chosen to close several activities. The following summary lists the activity, statutory objective, status, and short update.

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	MTW Activity	Objective	Status	Update
1	13-2 – Simplified Earned Income Disregard (S-EID)	SS/CE	Closed out	Replaced by FY24-1 Elimination of Earned Income Disregard. New HUD HOTMA rules will replace all EID once fully implemented.
2	20-3 – Family Self Sufficiency (FSS) Program Streamlining	SS/CE	Closed out	New HUD FSS rules eliminated the need for this activity. Other elements will be grouped with 14-6.

MTW Initiatives and Broader Use of MTW Funds
Expenditure of MTW Funds during FY2023

Projects	Cumulative Expenditure as of 6/30/2023
Program Administration and Implementation of MTW Initiatives ¹	\$2,035,288
Public Housing Operating Shortfall	\$10,716,839
Expansion of Public Housing Wi-Fi	\$147,846
Lincoln Predevelopment Costs	\$231,395
Development of Labor Street Multifamily Property	\$605,622
Alazan Courts Predevelopment Costs	\$141,638
Woodhill Bonds Pay-off	\$5,706,866
Acquisition of San Juan II	\$900,000
Acquisition of Ravello Apartments	\$1,584,638
Snowden Development Funding	\$1,071,465
Bristol at Somerset Loan	\$1,000,000
Beacon Debt Payoff	\$12,852,350
Total	\$36,993,947

¹Program Administration and Implementation of MTW Initiatives: The organization uses Moving to Work funds to support the Community Development Initiatives Department for MTW program administration and implementation. These funds allow the organization to provide higher quality supportive services to residents than would otherwise be permitted by grant funding alone. In addition, the organization can more effectively engage with partners and leverage resources for the benefit of the residents.

- Enhanced Resident Engagement: MTW funds were used to enhance existing resident engagement efforts, including hiring a Resident Leadership Coordinator to assist Public Housing residents in forming and running resident councils, including additional planning and administrative support for the expansion of resident engagement activities.
- Food Distributions: MTW funds were used to continue to assist with food distributions for

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023**

the organization residents.

- **Jobs Plus Program:** MTW funds were used in addition to grant funds to support the administration of the Jobs Plus Program at Lincoln Heights. The Jobs Plus program helps residents receive training and find employment opportunities. The organization partners with Alamo Workforce Solutions to identify in-demand occupations, as well as employers willing to provide training or educational assistance.
- **Resident Apprentice:** MTW funds also support the Resident Apprenticeship Program which provides meaningful work experience for residents. The organization has found that this program is an effective strategy to engage residents in educational, training, workforce development, and other self-sufficiency programs.
- **ConnectHomeSA:** The Agency uses MTW funds to support ConnectHomeSA. This program provides computer training courses. When residents complete six courses they earn a digital device.
- **Expansion of PH WiFi:** As part of The organization's Road to Digital Inclusion initiative, MTW funds will be used to narrow the digital divide and bring much needed Internet connectivity and accessibility. This will include broadband service for Public Housing communities.
- **Choice Endowment:** MTW funds were used in conjunction with grant funding to continue supportive services to residents as part of the Choice Neighborhood Initiative.
- **Youth Programming:** MTW funds were used on two partnership projects that will serve the organization youth through educational and afterschool programming onsite at public housing communities.
- **Opportunity Home Affordable Connectivity Outreach Grant Program:** Opportunity Home received a grant from the Federal Communications Commission on 6/7/23. The grant award was for \$125,000 for three years to pay for a Coordinator to sign up as many HCV and PH residents to the Affordable Connectivity Program. The organization is matching \$43,986.

PROPOSED ACTION:

None at this time.

STRATEGIC OUTCOMES:

Supports all strategic outcomes.

ATTACHMENTS:

Annual MTW Report
Presentation

Annual **MTW REPORT**

Fiscal Year 2022-2023
July 1, 2022 to June 30, 2023

Formerly San Antonio Housing Authority

Submitted to HUD for approval: September 29, 2023

Approved by HUD: TBD



MESSAGE FROM PRESIDENT AND CEO

Since 2009, our Moving to Work (MTW) designation has provided Opportunity Home San Antonio, formerly the San Antonio Housing Authority, the ability to leverage innovative strategies to more efficiently increase housing options and provide critical programs, services and resources to the families and individuals we serve.

This year, we celebrated our one-year anniversary as Opportunity Home San Antonio. The intentionality of the name change speaks to our core values of equity, compassion and excellence, and was inspired by our communities for whom home means much more than to have housing. We have developed new communities, provided improved services to our residents and elevated the ways we serve the San Antonio community.

With the rise in the cost of living and the potential cuts in federal funding, Opportunity Home is tasked with exploring creative and sustainable ways of maintaining and increasing housing options. Currently, Opportunity Home's development pipeline includes \$1 billion in investments to add more than 6,000 units. In the last year, as part of the local housing bond and federal grants, the City of San Antonio awarded Opportunity Home affordable housing projects more than \$25 million in funding. We continue to develop innovative means to increase housing options, such as the newly implemented Owner Incentive Payments program providing incentives up to \$500 to owners who lease to HCV and Mainstream program participants under new contracts.

Opportunity Home is obtaining its trauma-informed care certification and has made great strides in developing a framework for equity, diversity and inclusion across the organization and our communities. We installed free Wi-Fi at 72 of our 74 properties, providing internet service to more than 50,000 residents through our Wi-Fi Expansion Project. We enhanced our resident support services with food service, utility/rent assistance, wellness care, and more, and we are addressing safety in our communities with initiatives such as the drone program to assess property lighting.

Our work is ongoing and we look forward to continuing to fulfill our mission. As president and CEO, I am honored to serve more than 62,500 residents and work alongside more than 600 employees to help develop sustainable affordable housing solutions.

Warm wishes,

Ed Hinojosa, Jr.

President and CEO

Opportunity Home San Antonio



Opportunity Home San Antonio Leadership

Board of Commissioners

Gabriel Louis Lopez, Chair
Gilbert Anthony Casillas, Jr., Vice Chair
Dalia Flores Contreras
Estrellita Diaz Garcia
Janet Garcia
Leilah Powell
Vincent Robinson

Executive Team

Ed Hinojosa, President and Chief Executive Officer
Diana Kollodziej Fiedler, Chief Financial Officer
Richard L. Milk, Planning Officer
Brandee Perez, Chief Operating Officer
Michael Reyes, Public Affairs Officer
Muriel Rhoder, Chief Administrative Officer

Senior Team

Jo Ana Alvarado, Director of Innovative Technology
George Ayala, Director of Procurement
Vanessa Caballero, Assistant Director of Procurement
Ruth Bautista, Assistant Director of Federal Housing Programs
Dr. Jeneise Briggs, Director of Equity, Diversity and Inclusion
Kristen Carreon, Director of Operations Support
Sara Eaves, Assistant Director of Policy & Planning / Data Governance
Victoria Febus, Assistant Director Federal Housing Programs
Melissa Garza, Director of Beacon Communities
Wilson Harpe, Assistant Director of Construction Services and Sustainability
Domingo Ibarra, Director of Security
Aiyana Longoria, Director of Human Resources
Benjamin Lugg, Attorney
Hector Martinez, Director of Construction Services and Sustainability
Gary McLaurin, Assistant Director of Beacon Communities
Valerie Ochoa, Assistant Director of Assisted Housing Programs

Christine Patrick, Assistant Director of Operations Support - Policy
Rosario Plascencia, Assistant Director of Policy & Planning / Planning and Evaluation
Susan Ramos-Sossaman, Assistant Director of Development Services and Neighborhood Revitalization
Viridiana Rivera, Assistant Director of Community Development Initiatives
Janie Rodriguez, Assistant Director of Human Resources
Stephanie Rodriguez, Director of Assisted Housing Programs
Joel Tabar, Director of Resident Services
Katie Tran, Assistant Director of Operations Support - Data Analytics

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Sara Eaves, Assistant Director of Policy & Planning / Data Governance
Rosario Plascencia, Assistant Director of Policy & Planning / Planning and Evaluation
Esteban Spongberg, Policy & Planning Data Analyst



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Section I. B. | Overview of Short-term and Long-term MTW Goals and Objectives

Opportunity Home San Antonio provides housing to over 62,500 children, adults, and seniors through four housing portfolios – Public Housing, Housing Choice Vouchers, Beacon Communities, and other communities in partnership with non-profit entities and other agencies. Opportunity Home currently employs over 600 people and has a total annual operating budget of \$258 million. Existing real estate assets are valued at over \$500 million.

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

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

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

Strategic Plan

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

Guiding Principles and Statements

- **Vision:** Compassionate, equitable, and vibrant communities where people thrive
- **Mission:** Improve the lives of residents by providing quality affordable housing and building sustainable, thriving communities.
- **Impact Statement:** The San Antonio area has a high quality of life where all are thriving -- starting with Opportunity Home residents.
- **Values:** The organization has adopted a set of core values.



- **Equity:** Opportunity Home delivers services in a manner that creates fair outcomes, not just equal opportunities. Equity ensures that systems -- policies, programs, and rules -- do not create unfair results.
- **Compassion:** Opportunity Home delivers services in a manner that relieves suffering and improves the quality of life of residents.
- **Excellence:** Opportunity Home delivers services in a manner that sets high standards and improves continuously

Long-term outcomes

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

Two employee-focused outcomes

- Employees respect and value equity, diversity and inclusion
- Employees thrive at work

Four Resident-focused outcomes

- Residents have meaningful housing choice
- Residents live in quality homes
- Residents feel safe
- Residents have affordable utilities

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

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



Featured Success Stories

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

Sandra

Sandra moved to Alazan-Apache Courts in 2015 without a car, furniture or food, having been homeless prior to her arrival.

Determined to create a brighter future for her family of four, Sandra enrolled in the Family Self Sufficiency (FSS) Program, where she created a goal to have six months of employment and enhance her resume.

Sandra surpassed expectations for herself - she was promoted as a team lead at Whataburger in December after being employed for a month at the fast food chain.

The promotion made life a little easier for Sandra and her family.

“I am not having to sit here worrying about when my kids are going to eat the next day, where they are sleeping or when I am going to get paid,” she said. “I am able to just live. If my kids want a toy, I am able to get that for them because of everything I overcame.”



April

April is equipped to be a greater advocate for the education of her loved ones.

April and her neighbors engaged in a week-long Literacy Boot Camp organized by MindshiftEd from May 15 through 19 in the Alazan Community Room. MindshiftEd's mission is to empower families to be advocates for their children in the education system to ensure they receive the best quality education.



With a history of learning disabilities in her family, and with a daughter and granddaughter currently in elementary school, April enrolled in the camp to gain the tools hoping to stop the cycle.

The elementary school her children attend has a history of advancing students to the next grade level when they are not ready.

“I feel empowered,” April said. **“I am going to be my children’s voice.”**

With newfound knowledge, April can speak with educators about educational needs.

“I won’t be in the dark,” she said. **“I will walk away knowing that I spoke up and made a difference in children’s lives.”**

Loren

Opportunity Home’s Resident Wi-Fi program proved to be a saving grace for Loren.

When her monthly internet bill proved costly, Loren turned to the free Wi-Fi service to trim her bills down and allocate the money saved to other essential needs such as food, household products and bus fare. Having the service also allowed her to continue participating in Zoom calls and video chats, distribute emails, and join in on Opportunity Home’s ConnectHomeSA Program. She recently completed the program and earned a free digital device.



“I am very grateful for the Wi-Fi program,” Loren said. “I hope it continues going forward, and it should because it is cost effective. Internet service is one less bill I have to remember.”

In the future, Loren hopes to enroll in the Family Self-Sufficiency Program and work toward purchasing a home, launch a business and write a self-help book.

Yvonne

Digital literacy has played a big role for Yvonne in excelling her community.

As a participant in the Affordable Connectivity Program, Yvonne is able perform school work and set up telehealth appointments. She is currently studying to be a community health worker at an Alamo Colleges school through San Antonio’s Ready to Work program.

Having internet access to perform basic tasks has been a large help, as she would’ve had to go to a nearby restaurant or to a family member’s house to use the service.

“I am very grateful for the Affordable Connectivity Program,” she said. **“It has been helpful for me and my son. It’s one less strain and one less bill I have to worry about.”**



Yvonne has been spreading the benefits of digital connectivity to Opportunity Home residents as a resident apprentice under the Community Development Initiatives department.

She helps residents who participate in the ConnectHomeSA program learn basic computer skills and apply for the Affordable Connectivity Program, which provides discounted monthly internet service to individuals who qualify.

“If residents get stuck on lessons, I am helping them out,” Yvonne said. **“You don’t want someone to feel intimidated or feel like they are asking dumb questions.”**

Yvonne’s future goals are to finish school, get a business degree and continue making an impact throughout her community.



Sylvia

Opportunity Home gave Sylvia a chance to enjoy a place she can call her own.

Desiring to move out of her family's home, Sylvia moved into an Opportunity Home community four years ago and has made the most of her independence, working as a Licensed Vocational Nurse (LVN) after earning her degree in March 2022. She recently enrolled in the Family Self-Sufficiency program, where she set a goal of returning to school to pursue a bachelor's degree in nursing and to purchase a home.



Accomplishing the goals set out would mean “everything” to Sylvia.

“I have struggled being a single parent - no help from anyone,” she said. **“I did it on my own. Accomplishing my goals would show my boys that they can do it too.”**

Presently, Sylvia is proud to serve her community as an LVN - serving others is a trait she has carried with her throughout her life.

“I have always been a caring type, helping people when they needed it,” she said. **“It feels good knowing I am helping others with what they are needing - making them feel better or to protect them.”**

Sylvia advises residents who are facing struggles and looking to better their lives to pursue their goals and don't give up when obstacles arise.

“What they are going through can be temporary,” she said. **“If they stay positive, positive things will happen.”**



Section II | General Operating Information

Section II. A. | Housing Stock Information

Section II. A. i. Actual New Project Based Vouchers

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

PROPERTY NAME	NUMBER OF VOUCHERS NEWLY PROJECT-BASED (Planned*)	NUMBER OF VOUCHERS NEWLY PROJECT-BASED (Actual)	STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
NA	0	0	NA	NA	NA
Total:					
Planned or Actual Newly Project-Based	0	0			

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

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

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

We added no Project-Based vouchers during the FY23 Plan Year.

Section II. A. ii. Actual Existing Project Based Vouchers

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

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS (Planned*)	NUMBER OF PROJECT-BASED VOUCHERS (Actual)	STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
Gardens at San Juan	31	31	Leased / Issued	No	Mixed-income Community



East Meadows	8	8	Leased / Issued	No	Initial phase of Choice Neighborhood
Wheatley Park Senior	36	36	Leased / Issued	No	Final phase of Choice Neighborhood
Woodhill	35	35	Leased / Issued	No	Beacon Community - 10 support Next Step Housing Program (FY21-1 Activity) & 25 support VASH PBVs (Note: VASH PBVs are not funded through MTW and are only subject to specific MTW policies per HUD approval)
Rosemont at Highland Park	20	20	Leased / Issued	No	Beacon Community - supports Family Homeless Referral Program (FY15-3 Activity)
Total: Planned and Actual Existing Project-Based	130	130			

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

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

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

None.

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

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



ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN THE PLAN YEAR

PH: No change.

HCV: Added 70 Fair Share vouchers to the MTW program. Total MTW adjusted baseline denominator for vouchers is 12,421.

LNT: Added multiple properties to the MTW Local Non-Traditional housing stock: San Juan Square II, Woodhill, The Ravello, Bella Claire, Towering Oaks, Churchill Estates, Claremont, Warren House, Homestead, Monterrey Park, La Providencia, and Castle Point. They had a combined average of 1,187 unit months leased during FY2023.

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

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

Grant	Grant Amount	FY Beginning Cumulative Expended	FY End Cumulative Expended	Expended During FY2023	Remaining To Expend	% Expended
2020 Lead Based Paint	\$4,861,055	\$0	\$31,760	\$31,760	\$4,829,295	1%
2020 CFP	\$13,141,540	\$9,768,600	\$10,329,535	\$560,935	\$2,812,005	79%
2021 CFP	\$13,184,301	\$3,094,387	\$10,550,675	\$7,456,288	\$2,633,626	80%
2022 Safety & Security	\$250,000	\$0	\$0	\$0	\$250,000	0%
2022 CFP	\$16,156,991	\$0	\$3,487,123	\$3,487,123	\$12,669,868	22%
2023 CFP	\$16,484,164	\$0	\$0	\$0	\$16,484,164	0%
TOTAL FY23			\$24,399,093	\$11,536,106	\$39,678,95	

Property	Description
Blanco	Emergency Air Cooled Chiller Compressor
Cheryl West	Roof Replacement
Cross Creek	Parking Lot Repair and Resurfacing
Highview	Structural Investigation and Drainage Improvement Design



Lewis Chatham	MEP Consultant Emergency Generator Replacement
Lincoln	Connect Home - Computer Lab Site; A/E Site Survey-Design; New Windows; LBP Assessment
Madonna	Natural Gas System-Boiler Rm- Parking Lot; A/E Feasibility Study; Floor Drains
Mirasol Target Site	Roof Replacement
Mission Park	Roof Replacement
PHA Wide	Operations 1406; Administration 1410; CFP PM-Inspector Salaries
PHA Wide	CFFP Debt Service
PHA Wide	Environmental Reviews
Parkview	MEP Plumbing Repairs
Riverside	S&S Solar Lights and Wireless Cameras; LBP Assessment; Siding Repairs; Foundation; A&E Services
T.L. Shaley	Burn Unit Duplex Reconstruction; Unit Conversion - 829 Rita
Victoria Plaza	Comprehensive Modernization
Villa Tranchese	Fire Protection Improvements; MEP Consultant Elevator Repairs; MEP Repairs
Villa Veramendi	S&S Solar Lights and Wireless Cameras; Roof Replacement
W.C. White	MEP Consultant Emergency Generator Replacement

Section II. B. Leasing Information

Section II. B. i. Actual Number of Households Served

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

NUMBER OF HOUSEHOLDS SERVED THROUGH:	NUMBER OF UNIT MONTHS OCCUPIED or LEASED* Planned^^	NUMBER OF UNIT MONTHS OCCUPIED or LEASED* Actual	NUMBER OF HOUSEHOLDS SERVED** Planned^^	NUMBER OF HOUSEHOLDS SERVED** Actual
MTW Public Housing Units	71,388	65,808	5,949	5,484



Leased				
MTW Housing Choice Vouchers (HCV) Utilized	148,212	124,572	12,351	10,381
Local, Non-Traditional: Tenant-Based	N/A	N/A	N/A	N/A
Local, Non-Traditional: Property-Based	3,264	20,796	272	1,733
Local, Non-Traditional: Homeownership	N/A	N/A	N/A	N/A
Planned and Actual Totals:	222,864	211,176	18,572	17,598

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

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

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

Please describe any differences between the planned and actual households served:

The organization served fewer households than planned in FY2023. This is due to lingering operational, administrative, and housing market challenges which affected many organizations in the wake of the Pandemic. However, the organization developed and implemented several strategies to increase its utilization during FY2023, and was able to increase its MTW compliance from 94% to 96% over the fiscal year. As of August, 2023, its MTW compliance sits at 97%.

The organization planned to serve 18,572 total households but was only able to serve 17,598. For public housing, it planned to serve 5,949 households and served 5,484. For HCV, it planned to serve 12,351 households and served 10,381. The organization also planned to serve 272 LNT households and exceeded this by serving 1,733.

During FY2023, the organization took several new steps to address the operational, administrative, and housing market challenges which affected its leasing. For HCV, the organization increased payment standards twice, and implemented a Owner Incentive Program to increase landlord participation. It used new marketing strategies utilizing social media to showcase properties. It developed a resident retention plan for Beacon Communities that engages with residents 120 days, 90 days, and 60 days prior to lease expiration and



offers incentives for renewing leases early. The organization also formed new partnerships with local organizations to increase housing referrals. To address staffing issues, the organization used new approaches, utilizing targeted outsourcing and temp workers, while also focusing on training new hires to decrease processing delays. Additionally, the organization increased its MTW LNT housing stock by adding 12 new properties which had a combined average of 1,733 unit months leased during FY2023.

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY (NAME and NUMBER)	NUMBER OF UNIT MONTHS OCCUPIED or LEASED Planned^^	NUMBER OF UNIT MONTHS OCCUPIED or LEASED Actual	NUMBER OF HOUSE-HOLDS SERVED Planned^^	NUMBER OF HOUSE-HOLDS SERVED Actual
Tenant-Based	Name/#	#	#	#	#
Property-Based	FY2011-1e: Preservation & Expansion	3,264	20,796	272	1,733
Homeownership	Name/#	#	#	#	#
Planned and Actual Totals		3,624	20,796	272	1,733

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

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

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

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

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

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Public Housing	The post-pandemic labor shortage has impacted our ability to hire maintenance technicians, which is impacting our ability to turnover vacant units in a timely manner. Opportunity Home is exploring new recruitment techniques, to include partnering with trades skills



	training programs to provide an employment pathway for skilled workers, to fill vacancies in the maintenance technician position.
MTW Housing Choice Voucher	The organization continues to experience low staffing levels and a decrease in landlords willing to accept vouchers as well as other rental market challenges. The organization anticipates issues related to low staffing will resolve in FY2024 due to current recruitment efforts as well as procuring an outside vendor to help address the backlog of recertifications. In addition, on July 1, 2023 the organization announced the Owner Incentive Program which will provide \$500 to owners who participate in the HCV and Mainstream program under new contracts.
Local, Non-Traditional	None.

Section II. C. Waiting List Information

Section II. C. i. Actual Waiting List Information

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

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST STATUS (OPEN, PARTIALLY OPEN OR CLOSED)	WAS THE WAITING LIST OPENED DURING THE PLAN YEAR
Section 8 Tenant Voucher	Voucher	6,395	Open enrollment between 6/29/22 through 7/13/22, currently closed	Yes, partially
La Posada Mod Rehab	Site-based	43,238	Currently closed as of 8/13/23	Yes
Prospect Hill Mod Rehab	Site-Based	1,970	Currently closed as of 8/13/23	Yes
Serento Mod Rehab	Site-Based	28,071	Currently closed as of 8/13/23, no longer contracted with S8	Yes



Public Housing	Public Housing Waiting List Households	59,531	Open	Yes
Accessible Unit	For applicants who require a 504 accessible unit	854	Open	Yes
Elderly Mix Public Housing	For applicants who are 62 and above or who have a documented disability (they may be under the age of 62).	2,483	Open	Yes
Family Public Housing	For applicants who are in families	18,859	Open	Yes
East Meadows PBV	Project Based Voucher Site Based	16,136	Closed as of 6/21/21	No
Gardens at San Juan Square PBV	Project Based Voucher Site Based	34,986	Closed as of 6/21/21	No
Wheatley Park Senior PBV	Project Based Voucher Site Based	1,279	Closed as of 8/13/23	Yes, partially
PBV Referred Beacon	Project Based Voucher Site Based	11	Not open to public, used for S8 Special Referrals	No
Emergency Housing Voucher WL	This waitlist is used exclusively for EHV referrals from our partner SARAH.		Private waitlist not open to public, used for EHV referrals	No

Please describe any duplication of applicants across waiting lists:

Total number of unique applicants is 97,049

Section II. C. ii. Actual Changes to Waiting List in the Plan Year

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



WAITING LIST NAME	DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST
Public Housing Site based, Accessible Unit, Elderly Mix Public Housing, Family Public Housing	This waitlist became closed to future applicants effective midnight January 14, 2022. Future PH applicants will be added to 3 new PH waitlists: Family, Elderly Mix, and Accessible Unit.
Section 8 Tenant Voucher	This waitlist was open for 15 days in September 2021 to accept 5,000 applications and for 15 days beginning June 29, 2022 to accept 12,000 applications. There were a total of 10,464 applicants who applied, therefore all applicants were lottery winners. The organization is currently preparing to reopen the Section 8 Tenant Voucher waitlist for 15 days starting on November 1st, 2023.

Section II. D. Information on Statutory Objectives and Requirements

Section II. D. i. 75 percent of Families Assisted Are Very Low Income

INCOME LEVEL	NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR
80%-50% Area Median Income	187
49%-30% Area Median Income	69
Below 30% Area Median Income	30
Total Local, Non-Traditional Households Admitted	286

Section II. D. ii. Maintain Comparable Mix

HUD will verify compliance with the statutory requirement that MTW PHAs continue to serve a comparable mix of families by family size by first assessing a baseline mix of family sizes served



by the MTW PHA prior to entry into the MTW demonstration (or the closest date with available data) and compare that to the current mix of family sizes served during the Plan Year.

BASELINE MIX OF FAMILY SIZES SERVED (upon entry to MTW)

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

* "Non-MTW Adjustments" are defined as factors that are outside the control of the MTW PHA and/or unrelated to the MTW PHA's local MTW program. An example of an acceptable "Non-MTW Adjustment" would include demographic changes in the community's overall population. If the MTW PHA includes "Non-MTW Adjustments," a thorough justification, including information substantiating the numbers given, should be included below. MTW PHAs must continue to adhere to all fair housing obligations as detailed in the MTW Certifications of Compliance.

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

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

MIX OF FAMILY SIZES SERVED (in Plan Year)

FAMILY SIZE	BASELINE MIX PERCENTAGE**	NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	36%	7,260	41%	15%



2 Person	16%	3,387	19%	20%
3 Person	18%	2,658	15%	-16%
4 Person	13%	2,125	12%	-19%
5 Person	8%	1,227	7%	-23%
6 Person	6%	941	5%	-24%
TOTAL	100%	17,598	100%	

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

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

^^ The percentages in this column should be calculated by dividing the number in the prior column for each family size by the “Total” number of households served in the Plan Year. These percentages will reflect adjustment to the mix of families served that are due to the decisions of the MTW PHA. Justification of percentages in the current Plan Year that vary by more than 5% from the Baseline Year must be provided below.

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

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

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

San Antonio city, Texas					
		2016-2020 Estimates	2011-2015 Estimates	Statistical Significance	Percent Change
Population	Under 18 years	24.8%	25.9%	Yes	-4%
	62 years and over	15.2%	14.0%	Yes	9%

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



San Antonio city, Texas					
		2016-2020 Estimates	2011-2015 Estimates	Statistical Significance	Percent Change
Households by Type	Households with one or more people under 18 years	33.1%	36.2%	Yes	-9%
Percentage of families and people whose income in the past 12 months is below the poverty level	With related children of the householder under 18 years	20.0%	23.2%	Yes	-14%

Source: American Community Survey Comparative Social Estimates (CP02) and Comparative Economic Estimates (CP03); 2020 and 2015 Five-Year Estimates

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

San Antonio city, Texas					
		2016-2020 Estimates	2011-2015 Estimates	Statistical Significance	Percent Change
Bedrooms	Total housing units	555,138	535,145	Yes	
	No bedroom	3.30%	2.40%	Yes	4%
	1 bedroom	17.10%	16.60%		38%
	2 bedrooms	24.30%	24.50%		3%
	3 bedrooms	37.90%	39.00%	Yes	-1%
	4 bedrooms	15.00%	15.20%		-3%
	5 or more bedrooms	2.40%	2.30%		-1%

Source: American Community Survey Comparative Housing Estimates (CP04); 2020 and 2015 Five-Year Estimates

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

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



MTW ACTIVITY (NAME and NUMBER)	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY*	MTW PHA LOCAL DEFINITION OF SELF-SUFFICIENCY
FY2014-6: Rent Simplification	3	Definition: PH household who is paying a flat rent for at least 6 months or a HCV household utilizing a zero HAP voucher for at least 6 months.
FY20-1: College and University Homeless Assistance Program	0	
Across all PH and HCV households under MTW	23	
	3	(Households Duplicated Across MTW Activities)
	23	Total Households Transitioned to Self-Sufficiency

* Figures should match the outcome reported for all activities where the goal of increased self-sufficiency is used in Section IV of this Annual MTW Report.



Section III | Proposed MTW Activities

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



Section IV | Approved MTW Activities

This section includes a report out on all MTW Activities by their status.

Summary

Below is a list of approved MTW activities in the implemented status for FY2023.

Current Activity	Status
11-1e- Preservation and Expansion of Affordable Housing	Implemented/Ongoing
11-9- Allocate tenant-based voucher set-asides for households referred by non-profit sponsors who provide supportive services	Implemented/Ongoing
13-2- Simplified Earned Income Disregard (S-EID) (Public Housing)	Closed Out
13-4- HQS Inspection of Opportunity Home-owned non-profits by Opportunity Home inspectors	Implemented/Ongoing
14-3- Faster Implementation of Payment Standard Decreases (HCV)	Implemented/Ongoing
14-6- HCV Rent Reform	Implemented/Ongoing
15-2- Elderly Admissions Preference at Select Public Housing Sites	Implemented/Ongoing
15-3- Modified Project Based Vouchers	Implemented/Ongoing
19-1- Local Implementation of SAFMR	Implemented/Ongoing
19-2- Alternate Recertification Process (PH and HCV)	Implemented/Ongoing
20-1- College & University Homeless Assistance Program	Implemented/Ongoing
20-3- Family Self Sufficiency (FSS) Program Streamlining	Closed Out
21-1- Next Step Housing Program (THRU Project)	Implemented/Ongoing
21-2- Limiting increases in rents	Implemented/Ongoing
22-1- Opportunity Home Partnerships Providing Basic Needs for Residents Through Income Exclusions	Implemented/Ongoing
23-1 FY2023-1 Property-based local, non-traditional rental subsidy program (referred to locally as PH-like)	Approved/ Not yet Implemented



Section IV. A. Implemented Activities

FY2011-1e | Preservation and Expansion of Affordable Housing

Plan Year Approved, Implemented, Amended

This activity was approved and implemented in the FY 2010-2011 MTW Plan.

Description/Impact/Update

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

Impact & Update: This activity is implemented, ongoing, and on schedule. The tables below compare the baselines and benchmarks for each metric. All outcomes have met the benchmarks and no explanation is therefore necessary. This fiscal year, the organization used MTW flexibilities to preserve affordable housing units at 12 multi-family properties. The total unit count across all properties is 1,841 with 1,724 affordable at 80% or below. See Section V for more information.

HUD Standard metrics

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	0	0	0	Benchmark met



HC #2: Units of Housing Preserved

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	0	0	1,724	Benchmark met

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.



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

Plan Year Approved, Implemented, Amended

This activity was approved and implemented in the FY 2010-2011 MTW Plan.

Description/Impact/Update

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

Impact & Update: This activity is fully implemented, ongoing, and on schedule. At fiscal year end, the organization had secured partner-provided supportive services for 285 households housed through the set-aside voucher programs; an increase of 45 from last year. The organization has replaced the previous Housing Stability indicators with a new indicator, Median Tenure of Households Served. The initial benchmark of 2 years for this indicator was met. The tables below compare the baselines and benchmarks for each metric. As indicated in the table, the organization continues to work with referring partners to increase utilization and facilitate stable housing.

HUD Standard metrics

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of households receiving services aimed to increase housing choice (increase).	0	Up to 340	285	Benchmark is not met but it is trending in the right direction. It increased by 45



households compared to last year.

Opportunity Home metrics

Median Tenure

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Median tenure or length of stay in the set-aside program	2 year	2 years	2.8 years	Benchmark met

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: The organization replaced the Maintain Households Served metrics with Median Tenure of Households Served.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: The organization continues to work with partners for utilization.



FY2013-4 | HQS Inspection of Opportunity Home-owned non-profits by Opportunity Home inspectors

Plan Year Approved, Implemented, Amended

This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY 2012-2013 MTW Plan. Implementation began on January 1, 2013.

Description/Impact/Update

Description: This activity allows Opportunity Home inspectors (instead of third-party contractors) to inspect and perform rent reasonableness assessments for units at properties that are either owned by Opportunity Home under the organization's non-profit portfolio, Beacon Communities, or owned by an Opportunity Home-affiliate under the organization's partnerships portfolio.

Impact & Update: This activity is implemented, ongoing, and on schedule. The tables below compare the baselines and benchmarks for each metric. All outcomes have met the benchmarks and no explanation is therefore necessary.

HUD Standard metrics

CE #1 | Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Total cost of the task in dollars (decrease).	\$76.32 per inspection	\$55.46 per inspection	2,797 inspections \$58,345 savings	Benchmark met

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2014-3 | Faster Implementation of Payment Standard Decreases

Plan Year Approved, Implemented, Amended

This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY 2013-2014 MTW Plan.

Description/Impact/Update

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

Impact & Update: The SAFMRs all increased in FY2023; therefore, this waiver was not utilized during the fiscal year.

HUD Standard metrics

CE #1 | Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Total cost of the task in dollars (decrease).	12,129 Annual Average Households Served (FY2014) multiplied by \$568.43	12,129 Annual Average Households Served (FY2014) multiplied by \$568.43	NA	NA

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2014-6 | HCV Rent Reform

Plan Year Approved, Implemented, Amended

Previously approved

This activity was approved as two separate activities and subsequently combined into one activity. (FY2014-6: Rent Simplification (HCV) and FY2015-4: Simplified Utility Allowance Schedule)

Both activities are designed to work together to reduce cost and increase cost effectiveness. For FY 2014-6 Rent Simplification, the Agency received HUD approval as part of the FY 2013-2014 Plan and began implementation in July 2014. For FY 2015-4: Simplified Utility Allowance Schedule, the Agency received HUD approval as part of the FY2014-2015 MTW Plan and began implementation in January 2015.

This activity is designed to meet the statutory objective of increasing cost effectiveness, and was originally approved as part of the FY 2014-2015 MTW Plan.

Description/Impact/Update

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

(1) Rent Simplification Description: Previously, rent calculation was based on 30% of the participant's adjusted monthly income. This activity lowers the percentage used to calculate rent to 27.5% of monthly gross income for all MTW HCV participants and new admissions, and eliminates deductions (i.e., medical and child care) with minimal impact to the participant's rent portion. Additionally, the organization will not disregard the participant's income using the traditional Earned Income Disallowance (EID) calculation.

The per-unit cost will be calculated by the total housing assistance payments divided by the total number of units leased each month. The housing assistance payments expense will be obtained from the monthly financial statements and the total units will be obtained from the Unit Month Report. The organization will conduct time studies to verify the number of hours that staff spends calculating tenant rent portion. The quality control score will be obtained from an Access database..

(2) Description: Prior to this activity, the Agency conducted annual reviews and periodically re-established a Utility Allowance Schedule to represent reasonable utility cost expectations as part of a tenant's lease. The Utility Allowance Schedule is based on utility surveys and analysis of the type of structure, bedroom size, appliances provided by the tenant, and type of appliances (gas/electric).

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



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

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

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

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

The flat utility allowance will not be granted in the case of tenant-provided appliances, which are not considered tenant-supplied or -paid utilities. The organization will continue to use current market consumption data to determine when adjustments to the simplified schedule are needed (upon change of more than 10% in rates).

Hardship Policy: Households that experience a rent increase of \$26 or more due to the rent simplification calculation will be granted a hardship exemption and have the household’s TTP calculated in accordance with 24 CFR 5.628 (i.e., non-MTW TTP calculation). Participants who are granted a hardship exemption will remain exempt until their rent portion falls below the \$26 threshold. Hardship exemptions under this provision will be verified at each recertification.

On June 13, 2019, the Agency received HUD approval to extend these MTW Agreement provisions to its HUD-VASH program. The Agency implemented the extension of this waiver to the HUD-VASH Program in FY2020.

Impact & Update: This activity is implemented, ongoing, and on schedule. There are no concerns with the cost-savings indicator. The organization did see an increase in the error rate. High staff turnover and the resulting lost knowledge base contributed to data entry mistakes which in turn caused the error rate to increase. New QA/QC procedures have been implemented to ensure utility allowance rates are being correctly input.

HUD Standard metrics

CE #1 | Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Total cost of the task in dollars (decrease).	1 hours per processed file	.25 hours per processed file	4,003 files processed	Benchmark met



\$76,798 in savings

CE #3 | Decrease in Error Rate of Task Execution

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Average error rate in completing a task as a percentage (decrease).	11%	40%	48%	Benchmark not met

SS #8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of households transitioned to self sufficiency (increase). HCV household utilizing a zero HAP voucher for at least 6 months.	0	0	3	Benchmark met

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: Adjusted the Benchmark for CE #3 to 40%. This target is more reasonable considering the long term staffing issues the organization is faced with. Most of the staff are new, and turnover remains high. This contributes to the higher than normal error rate.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: The benchmark for indicator CE #3 was not met. The same issues which contributed to the high error rate during the previous fiscal year are still present. High staff turnover and the resulting lost knowledge base contributed to data entry mistakes which in turn caused the error rate to remain above the benchmark.



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

Plan Year Approved, Implemented, Amended

This activity is designed to meet the statutory objective of increasing housing choices for low-income families and was originally approved as part of the FY2014-2015 MTW Plan and implemented November 1, 2014.

Description/Impact/Update

Description: This activity establishes a 4-to-1 elderly admissions preference at specific communities in order to increase housing choices for elderly households.

The goal of the activity is to address continuing concerns of elderly residents at specific communities regarding lifestyle conflicts between elderly and non-elderly residents. Property Management's ability to address these conflicts is reduced significantly when the ratio of non-elderly to elderly residents rises above a certain proportion. The 4-to-1 admissions preference is proposed in order to create and maintain an optimal mix of elderly and non-elderly residents in each community.

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

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

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

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



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

Impact & Update: This activity is implemented, ongoing, and on schedule. The tables below compare the baselines and benchmarks for each metric. The benchmarks have been met within a reasonable / acceptable margin.

HUD Standard metrics

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	337	Benchmark met
Total	231	378	337	
Fair Avenue	110	173	156	
WC White	38	60	59	
Lewis Chatham	60	95	96	
Marie McGuire	23	50	26	

Opportunity Home metrics

Elderly Household Percentage

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Percentage of units occupied by elderly households	Percentage of units occupied by elderly households prior to implementation of the activity	Expected percentage of units occupied by elderly households after implementation of the activity	73%	Benchmark met
Total	51%	80%	73%	



Fair Avenue	51%	80%	75%
WC White	51%	80%	80%
Lewis Chatham	51%	80%	83%
Marie McGuire (added FY22)	34%	80%	43%

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2015-3 | Modified Project Based Vouchers (MPBVs)

Plan Year Approved, Implemented, Amended

This activity was approved in FY 2014-2015 and implemented in the same fiscal year. It has been amended two times since implementation.

FY 2019-2020 Amendments:

- Allocated eighty (80) additional project-based vouchers to support the follow initiatives:
 - THRU Project: Up to ten (10) modified PBVs at Opportunity Home properties will be committed to support a local non-profit organization, THRU Project, in their mission to help foster youth aging out of the foster care system.
 - Family Homeless: Up to twenty (20) modified PBVs at Opportunity Home properties will be committed to support the South Alamo Regional Alliance for the Homeless (SARAH). SARAH is the local Continuum of Care Lead Agency charged to create an improved service system that effectively provides support, coordination, and housing to all homeless populations within San Antonio and Bexar County, with a primary focus on moving individuals and families out of homelessness efficiently and permanently.
 - Beacon Communities or Partnerships: Up to fifty (50) modified PBVs at one of Opportunity Home's Beacon or Partnership properties. These units will support a new workforce initiative as outlined in the proposed activity, FY2020-4: Time-Limited Workforce Housing Pilot Program.
 - Beacon Communities: Up to thirty (30) modified PBVs at a new Opportunity Home - Beacon development. These units will support a new homeless college program as outlined in the proposed activity, FY 2020-2: St. Phillips College Homeless Program (SPC-HP).
- Adopted an alternative waitlist policy for the modified PBVs committed that support the THRU Project, Family Homeless Initiative, Workforce Initiative, and St. Phillips College Homeless Program so that the units would be reserved for direct referrals from these partners. (24 C.F.R. 983.251: How participants are selected)
- Received waiver to remove the twenty-five percent (25%) per project cap for the Agency's modified project based units.

FY 2020-2021 Amendments:

- Relocated ten (10) MPBVs previously approved under this activity to a new activity, FY 2021-1: Next Step Housing Program (THRU Project).
- Removed the plan to commit 30 modified project based vouchers to support a college homeless program at a tiny home development. This development is no longer moving forward.
- Committed 44 modified project based vouchers at a new development. 100 Labor, an approximately 213-unit multifamily project, is located at 100 Labor Street. The project is



expected to cost approximately \$54,599,095. This project is planned to receive gap financing through the Agency's Moving to Work funding flexibility.

- Family Homeless: Twenty (20) MPBVs were allocated to Rosemont at Highland Park, a property in the Agency's Beacon Communities Portfolio. Due to lack of vacancies, the Agency plans to allocate these vouchers across multiple properties to ensure they are utilized and occupancy needs are met.
- FY2020-4: Time-Limited Workforce Housing Pilot Program: Fifty (50) PBVs have been allocated to St. John's Square, a new property to be constructed under the Agency's Partnerships Portfolio.
- Received waiver to determine contract rents and increases and to determine the content of contract rental agreements that differ from the currently mandated program requirements in the 1937 Act and its implementing regulations. In alignment with the agency's goal to increase housing choice, this waiver also allows the organization to analyze the MAFMRs and SAFMRs and use the higher payment standard on future MPBV contracts.
- Received waiver to remove the requirement that an independent entity must determine the initial contract rent and annual redetermination of rent. This waiver allows the organization to determine the contract rent in accordance with PBV regulations. Current regulations require the organization to rely on a third-party to initiate the HAP contract and adjust the rent at any request for rental increase. PBV regulations for determining rent to owner, on the other hand, specify that the amount of rent to owner must be set at the lower of:
 - an amount based off payment standard minus UA;
 - the reasonable rent (determined by a third party); or
 - the rent requested by the owner.

Description/Impact/Update

Description: This activity modifies the standard Project Based Voucher program in two ways. First, this activity allows the organization to commit vouchers to developments in the organization's new and existing properties. The vouchers increase the number of units that are affordable to households based on their actual ability to pay. For example, a tax credit rent affordable to a 30% AMI household will be affordable to a 4-person household earning \$17,640 or more. However, many households earn much less than that, and a 4-person household earning \$10,000 (typical for Opportunity Home-assisted households) is not able to afford a tax credit rent affordable to a 30% AMI household. the organization may commit vouchers to any Opportunity Home owned or controlled development. This activity applies only to commitment of vouchers to Opportunity Home owned or controlled units. Any commitment of vouchers to privately-owned developments will be made through a competitive process outside the scope of this activity.

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



FY2011-8 provided a tenant-based voucher to a household after two years in the local project based set aside unit.

Impact & Update: This activity is implemented, ongoing, and on schedule. The tables below compare the baselines and benchmarks for each metric. The benchmarks have been met within a reasonable / acceptable margin. At fiscal year end, the organization had not project-based any new vouchers under this activity as planned. This activity continues to provide deeper affordability to households as a result of the income-based rents versus tax-credit restricted rents. Per the metric table, the actual AMI level of households is well below the upper AMI limit and targeted upper AMI limit.

HUD Standard metrics

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	0	0	0	
				Benchmark met
Previously added units				
Gardens at San Juan Square (FY15)		31	31	
East Meadows (FY17)		8	8	
Wheatley Senior Park Senior Living (FY18)	0	36	36	
Woodhill (FY20)		10	10	
Rosemont at Highland Park (FY20)		20	20	

Median Household Income

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Median income of households living in local project based set-aside voucher units, by income bracket	AMI upper limit of households living in units	Targeted AMI upper limit of households living in units		Benchmark met



80% AMI	80% AMI	75% AMI	NA - no households
60% AMI	60% AMI	55% AMI	NA - no households
50% AMI	50% AMI	45% AMI	38% AMI
30% AMI	30% AMI	25% AMI	15% AMI

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: None.



FY2019-1 | Local Implementation of SAFMR

Plan Year Approved, Implemented, Amended

This activity was approved in FY 2018-2019 and implemented in the same fiscal year.

- FY 2018-2019: Phase I was approved and implemented
 - Established 2-Tier Policy Map
 - Set a subsidy cap of \$1.5M for higher cost areas
 - Set payment standard schedule outside the 90-110% of the MAFMR and SAFMRs
 - Established an exception overlay
- FY 2019-2020: Phase II was approved and implemented
 - Expanded the number of small areas from two (2) to ten (10),
 - Eliminated the subsidy cap from Phase I,
 - Set payment standard schedule outside the 90-110% of the MAFMR and SAFMRs, and
 - Updated the exception overlay mechanism.

Description/Impact/Update

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

Impact & Update: This activity is implemented, ongoing, and on schedule. This fiscal year the organization has continued to experience operational and administrative challenges in addition to unprecedented rental market pressures impacting the housing choice voucher program. Despite this, the organization is still seeing a higher proportion of households moving to areas of the jurisdiction where they previously were not (see HC#5). For further context, there were 711 households that moved to a higher ZIP code tier in FY23 compared to 430 in FY22. and 371 new households in FY23 compared to 190 in FY22.

HUD Standard metrics

HC #5: Increase in Resident Mobility

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of households able to move to a better unit and/or neighborhood of opportunity as a	41%	41%	47%	Benchmark met



result of the activity
(increase).
"Better" defined as
moving to Groups
4-10

Opportunity Home metrics

Lease-up Success Rate by Post-Move Group

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Percent of vouchers issued that were leased-up within 120 days	89%	86%	Group 1 - EO: 40% Group 2: 53% Group 2 - EO: 20% Group 3: 51% Group 3 - EO: 50% Group 4: 49% Group 5: 57% Group 6: 54% Group 7: 49% Group 8: 43% Group 9: 58% Group 10: 77%	This indicator is intended to help the organization monitor whether anyone grouping is experiencing relatively lower lease up success rates that may or may not be related to payment standards

Average # of days searching by Post-Move Group

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Average number of days between the date the voucher is issued and the date the request for tenancy (RTA) is approved.	58 days	58 days	Group 1: 72 Group 1 - EO: 130 Group 2: 88 Group 2 - EO: 106 Group 3: 95 Group 3 - EO: 240 Group 4: 88 Group 5: 81 Group 6: 94 Group 7: 98 Group 8: 77 Group 9: 76 Group 10: 81	This indicator is intended to help the organization monitor whether anyone grouping is experiencing relatively lower lease up success rates that may or may not be related to payment standards

Average HAP by Group



Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Average Housing Assistance Payment by Group	Group 1: \$601	Group 1: \$601	Group 1: \$587	This indicator is intended to help the organization monitor whether anyone grouping is experiencing relatively lower lease up success rates that may or may not be related to payment standards
	Group 1 - EO: \$609	Group 1 - EO: \$609	Group 1 - EO: \$564	
	Group 2: \$608	Group 2: \$608	Group 2: \$620	
	Group 2 - EO: \$591	Group 2 - EO: \$591	Group 2 - EO: \$687	
	Group 3: \$614	Group 3: \$614	Group 3: \$696	
	Group 4: \$620	Group 3: \$614	Group 3 - EO: \$638	
	Group 5: \$690	Group 4: \$620	Group 4: \$696	
	Group 6: \$603	Group 5: \$690	Group 5: \$815	
	Group 7: \$707	Group 6: \$603	Group 6: \$777	
	Group 8: \$847	Group 7: \$707	Group 7: \$919	
Group 9: \$755	Group 8: \$847	Group 8: \$887		
Group 10: \$876	Group 9: \$755	Group 9: \$1,050		
		Group 10: \$876	Group 10: \$1,500	

Households moving to a better neighborhood by Post-Move Group

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Percentage of households self-reporting that they consider the unit for which they submitted a request to be in a better neighborhood than their current place of residence on post-move surveys (increase).	87%	87%	In FY2024, the organization may adjust the metric and/or baselines and benchmarks to reflect the new data collection effort through a new surveying function	Due to the pandemic, the survey used for this indicator was put on hold. The organization has developed a new organization-wide surveying function and is exploring the feasibility of incorporating this question or a derivative in forthcoming survey efforts.

HCV Concentration by Group

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
HCV households living in each Group as a percentage of total	Group 1: 8% Group 2: 8% Group 3: 10% Group 4: 3% Group 5: 2%	Group 1: 8% Group 2: 8% Group 3: 10% Group 4: 3% Group 5: 2%	Group 1: 5% Group 2: 6% Group 3: 7% Group 4: 3%	This indicator is intended to help the organization monitor whether anyone



renter households	Group 6: 3%	Group 6: 3%	Group 5: 2%	grouping is experiencing relatively lower lease up success rates that may or may not be related to payment standards
	Group 7: 2%	Group 7: 2%	Group 6: 2%	
	Group 8: 0%	Group 8: 0%	Group 7: 3%	
	Group 9: 1%	Group 9: 1%	Group 8: 1%	
	Group 10: 1%	Group 10: 1%	Group 9: 1%	
			Group 10: 1%	

I. **Actual Non-Significant Changes:** Opportunity Home increased payment standards twice during FY23 to keep up with rising rents. The organization also updated zip code assignments based on analysis of FY2023 SAFMRs.

II. **Actual Changes to Metrics/Data Collection:**

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

III. **Actual Significant Changes:** None.

IV. **Challenges in Achieving Benchmarks and Possible Strategies:** The most significant challenge for this activity continues to be the impacts of the pandemic and the current local market conditions. Additionally, we have lost nearly half of our landlords since the Pandemic. Because of this, improving current utilization in the housing choice voucher program is still the top priority for the organization. Some strategies the organization is implementing are:

- Increasing the initial 60 day time period for voucher holders to find an apartment to 120 days, with an automatic 60 day extension once the 120 days expires.
- Initiating a landlord incentive program which will grant participating landlords a \$500 payment incentive to accept MTW Vouchers.
- Planning on increasing payment standards again in FY24 with the goal of making all tiers above 100% of the median



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

Plan Year Approved, Implemented, Amended

This activity is designed to achieve the MTW statutory objective to reduce cost and achieve greater cost effectiveness in Federal expenditures, by providing an alternate schedule for the annual reexamination process, specific PH review procedures, and certification methods of income and assets. The use of oral verifications reduces the organization's administrative costs for postage, paper and envelopes when mailing written third party verification to the client's employer. The activity was approved in the FY 2018-2019 MTW Plan and implemented in FY 2018-2019.

In FY2023, the activity was amended as follows:

- (1) change to the alternate schedule for the housing choice voucher programs and public housing program; all households were moved to triennials.
- (2) adding alternate payment standard increase procedures.

Description/Impact/Update

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

1) Alternate Recertification Schedule (PH and HCV)

This activity established biennial and triennial schedules for recertifications for the low income public housing and housing choice voucher programs. The Agency has been using alternative schedules since 2011. In FY2023, the agency updated the schedule for all households to triennials. Beginning FY2016, the organization created a local form with an expiration date of 39 months to replace the HUD-9886 Form with its 15 month expiration date. In the future, the organization may create its own local forms with different expiration dates or other elements to accommodate this activity.

2) Alternate PH Review Procedures (PH only)

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



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

3) Alternate Income Verification Methods (PH and HCV)

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

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

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

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

On June 13, 2019, the Agency received HUD approval to extend these MTW Agreement provisions to its HUD-VASH program. The Agency implemented the extension of this waiver to the HUD-VASH Program in FY2020.

(4) Implementation of Payment Standard Increases at Request for Rental Increase (HCV)

Typically, when the payment standard amount is increased, the increased payment standard is applied at the family's next regular reexamination. In order to reduce tenant rent burden due to approved rental increases during interim recertification years, this activity allows the organization to apply the increased payment standards at each approved request for rental increase.

Impact & Update: This activity is implemented, ongoing, and on schedule. The tables below compare the baselines and benchmarks for each metric. The CE #3 error rate metric remained high during FY23. However this was expected, considering that there is still a backlog of certifications due to



unprecedented volume of interim recertification requests, resulting from income and household composition changes during the pandemic. It should be noted that the organization processed a larger than normal number of recertifications in FY23 than in previous years. The organization also updated the schedule for all recertification schedule to triennials for all households.

HUD Standard metrics

CE #1 | Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of the task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	HCV: \$479,520	HCV: \$152,264	HCV: \$81,998	Benchmark met
	PH: \$221,778	PH: \$73,926	PH: \$71,928	
	Total: \$701,298	Total: \$226,190	Total: \$153,926	
Savings:	Savings: \$475,108	Savings: \$547,372		

CE #3 | Decrease in Error Rate of Task Execution

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage)	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	HCV: 16%	HCV: 25%	HCV: 20%	Benchmark not met
	PH: 45%	PH: 40%	PH: 46%	

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: The organization updated the schedule for all households to triennials and added alternate payment standard increase procedures.

Challenges in Achieving Benchmarks and Possible Strategies: Staffing issues pose a serious challenge as most staff are newly hired. There is still a large backlog of recertifications from the pandemic, which resulted in a larger than normal volume being processed in FY 2022-23 compared



with the prior year. This coupled with staffing challenges contributed to the error rate remaining high. The move to a triennial schedule should eventually decrease the volume of recertifications which should help decrease staff workload and the error rate.



FY2020-1 | College & University Homeless Assistance Programs

Plan Year Approved, Implemented, Amended

This activity is designed to achieve the MTW statutory objective to increase housing choices, by providing homeless college students stable housing. The activity was approved in the FY 2019-2020 MTW Plan and implemented in FY 2020-2021.

Description/Impact/Update

Description: The activity supports the creation of a homeless set-aside program(s) in partnership with local college(s) and university(ies) to address the local housing needs of homeless college and/or university students.

The organization is tackling this local housing need with a tenant-based set-aside voucher. Because these set-asides will have time limits, alternative eligibility requirements, and are married to homeless college/university pilot program(s), they are managed and reported on separately from the organization's set-asides allocated under FY2011-9.

This activity enables the organization to set-aside tenant-based housing choice vouchers for households referred by Alamo community colleges. Initially, 20 vouchers were set-aside for Palo Alto College and 30 for St. Philip's College, now all 50 vouchers may be utilized at any of the 5 Alamo community colleges. The organization may set-aside additional vouchers to support additional college(s) and/or university(ies) who enter into a partnership with the organization.

Students seeking housing vouchers through the Homeless Assistance Program(s) must meet criteria outlined by the partner organization. Partner Programs may have slightly different college/university program eligibility requirements. Eligibility for Opportunity Home housing will remain consistent across all programs. Students must adhere to both sets of requirements.

Students receiving housing assistance through this set-aside must meet Opportunity Home eligibility criteria for income levels, background check and lawful residency. Students will follow all other voucher policies including MTW rent calculations (see FY2014-6: HCV Rent Reform), MTW mandatory orientation (see FY2014-2: Early Engagement), MTW alternative payment standard schedules (see FY2019-1: Local Small Area Fair Market Rent Implementation), and MTW alternative examinations (see FY2019-2: Alternate Recertification Process (PH and HCV)). Students have up to one semester after graduation to secure housing at which point students are no longer eligible for the housing voucher.

In addition, this proposed activity is designed to meet the requirements of 24 CFR 5.612 and Section 211 of the Department of Housing and Urban Development Appropriations Act, 2019, which establish



parameters within which Section 8 assistance can be provided to individuals enrolled as students in institutes of higher education. Per those parameters, Opportunity Home will not provide assistance to any student who meets all of the following criteria:

- is under 24 years of age;
- is not a veteran;
- is unmarried;
- does not have a dependent child;
- is not a person with disabilities, as such term is defined in section 3(b)(3)(E) of the United States Housing Act of 1937 (42 U.S.C. 1437a(b)(3)(E)) and was not receiving assistance under such section 8 as of November 30, 2005;
- is not a youth who left foster care at age 14 or older and is at risk of becoming homeless; and
- is not otherwise individually eligible, or has parents who, individually or jointly, are not eligible, to receive assistance under section 8 of the United States Housing Act of 1937 (42 U.S.C. 1437f).

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

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

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

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



voucher. However, Opportunity Home will continue to assess if there is a need for continued assistance and will consider a preference for the HCV wait list.

Impact & Update: Although the initial implementation for this activity experienced challenges, it is progressing past them. The organization served 36 student households this year out of the maximum number of 50, which was a large increase from the 20 served in the previous year. This activity has also allowed the organization and its partners to understand more fully the scope of homelessness for our local student populations. As a result, our partners have been able to increase awareness of the issue amongst its student population and are more successful in identifying students who are experiencing homelessness. As a result, the organization is currently discussing the possibility of expanding voucher allocations to meet the growing need.

HUD Standard metrics

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	Housing units of this type prior to implementation of the activity (number).	Expected housing units of this type after implementation of the activity (number).	Actual housing units of this type after implementation of the activity (number).	Benchmark met
Number of new housing units made available	0	50	50	

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected number of households receiving these services after implementation of the activity (number)	Actual number of households receiving these services after implementation of the activity (number).	Benchmark not met
Households Assisted by Services that Increase Self Sufficiency	0	50	36 student households	

SS #5: Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self sufficiency (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected number of households receiving these services after implementation of the activity (number).	Actual number of households receiving these services after implementation of the activity (number).	Benchmark not met
Households Assisted by Services that Increase Self Sufficiency	0	50	36 student households	

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: We removed the metrics tracking the performance of the individual colleges involved and replaced them with a single metric which combines them.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: Many of the challenges which have reduced the effectiveness of this activity in the past are still present. The COVID Pandemic delayed referrals and the delivery of partner services at implementation which prevented this activity from meeting initial milestones. Staffing shortages, both with Opportunity Home and its partners, continue to be a challenge. Another challenge is that potential participants, who may benefit from this activity, are deemed ineligible because they do not meet the current qualifying criteria. To remedy this, the organization wants to adjust the MOU for eligibility requirements to include "an unhealthy living environment" as a circumstance which would qualify potential participants.



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

Plan Year Approved, Implemented, Amended

This activity is designed to meet the statutory objective of increasing housing choices. The activity was approved in the FY 2020-2021 MTW Plan.

Description/Impact/Update

Description: The housing assistance provided by the organization is intended to allocate vouchers to youth aging out of foster care who are at risk of homelessness. The voucher provides the youth the ability to lease decent, safe, affordable housing in the private housing market.

Partner Program Overview

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

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

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

Activity Overview

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

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

¹ Youth may currently be in extended foster care.



Year 1 (12 months)

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

Years 2 and 3 (24 months)

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

Alignment with other MTW activities

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

Impact & Update: This activity is in its second year of implementation but is still behind schedule. At the end of FY2023, the organization had five youth housed through this small program.

HUD Standard metrics

HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	0	Year 1: 10 PBVs Year 2: up to 20 (10 PBVs 10 TBVs) Year 3 and beyond: up to 30 (10 PBVs, 20 TBVs)	20 PBVs committed	Benchmark met

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0	Year 1: 10 youth Year 2: up to 20 Year 3 and beyond: up to 30	5	Benchmark not met

SS #5: Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self sufficiency (increase).	0	Year 1: 10 youth Year 2: up to 20 Year 3 and beyond: up to 30	5	Benchmark not met

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: Due to the delay in leasing up the committed PBVs, the benchmarks for the second year of implementation (FY2022) were reset using year 1 benchmarks. Because of this, the first set of youth entered their second year of housing in FY2023.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: This pilot program has offered many opportunities for the organization to test and learn how to partner with another organization to meet the unique needs of youth aging out of foster care. The design of the housing assistance has presented challenges for students as well as property management. Students do not have location



choice as a result of the project-based housing. In addition, property management has faced challenges with balancing occupancy needs with ensuring units are available for students as soon as possible. As a result, the organization is exploring whether to administer these vouchers in the same manner as the Foster Youth to Independence (FYI) vouchers, which serve the same population and may address both of the current challenges. The organization has applied for these vouchers and will review this activity as part of the upcoming planning cycle for FY2025. Another possible solution being explored is to allow the project based voucher to be allocated at additional properties.



FY2021-2 | Limiting increases in rents

Plan Year Approved, Implemented, Amended

This activity is designed to increase housing choices for low-income families who might be experiencing a loss of income or other economic hardship, and are unable to pay additional rent. The activity was approved in the FY 2020-2021 MTW Plan.

Description/Impact/Update

Description: The local rental market has seen unprecedented impacts from the ongoing pandemic. The original intent of the activity was to temporarily cap rental rate increases at 3% and then sunset after 24 months, or sooner, if the national funding situation improved, and the organization was able to meet MTW requirements of serving substantially the same number of households.

In FY2022 the organization reviewed this activity and determined that an increase from 3% to 5% would balance out the priority to protect clients from large rent increases with the need to support voucher holders in being competitive tenants in the rental market. In addition, the organization added a limit to the number of rental increase requests to one per year. Both were approved in the FY2022 MTW Plan.

The rental increase cap was removed in FY2023. Overall, based on metrics and feedback from landlords and tenants the organization believes the temporary cap achieved its intended impact of protecting residents during the first year of the pandemic when we were faced with unprecedented challenges. The organization believes the removal of the cap will allow tenants to be more competitive in the market.

Impact & Update: The average rent increase was \$129.06 in FY2023. This is above the benchmark of \$26.30. A factor that explains this increase is that the organization removed the rental increase limit entirely beginning June 1, 2023. The limit of one rental increase request per year is still in effect.

HUD Standard metrics

HC #4: Displacement Prevention

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
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Number of households at or below 80% AMI that would lose assistance or need to move (decrease). If units reach a specific type of household, give that type in this box.	230	230	N/A	The organization no longer uses a CAP amount.
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Average Rent Increase

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average rent increase	\$70.16 average requested increase	\$26.30 average accepted rent increase	\$129.06 average accepted rent increase	Benchmark not met

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: The organization is experiencing a backlog of rental increase requests from 2022. Although the average accepted rent increase exceeded our benchmark, that is unsurprising considering that we removed the limit on rental increase amounts and reduced the number of rental increase requests to one per year. Because of the removal of the rental increase cap, which was the fundamental component of this activity, we are exploring closing out this activity and incorporating the limit to rental increase requests into the 19-2 Alternate Recertification activity.



FY2022-1 | Opportunity Home Partnerships Providing Basic Needs for Residents Through Income Exclusions

(currently named: Opportunity Home Partnerships Providing Basic Needs for Residents Through Income Exclusions)

Plan Year Approved, Implemented, Amended

This activity is designed to meet the statutory objective of increasing housing choices. In addition, this activity is in alignment with the Agency’s strategic outcome to pursue partnerships that result in residents having access to basic non-housing needs. By excluding these contributions from the annual income, clients will be able to receive additional local support and not have their housing assistance negatively impacted. The activity was approved in the FY 2021-2022 MTW Plan.

Description/Impact/Update

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

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

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

Impact & Update: This activity is implemented, ongoing, and on schedule. The organization was able to exceed the expected benchmark for leveraged funds but fell short of the households receiving contributions targets. As the organization continues to engage in new partnerships, additional contributions and services will be added to the metric tracking.

HUD Standard metrics

HC #7: Households Assisted by Services that Increase Housing Choice

Unit of	Baseline	Benchmark	Outcome	Benchmark
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Measurement			Achieved?
Number of households receiving services aimed to increase housing choice (increase).	0	Estimated 1,500 served monthly or 18,000 served annually for food assistance (this may include one household being served multiple months)	11,494 Benchmark not met

CE #4 | Increase in Resources Leveraged

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	0	Estimated \$700,000 leveraged annually for food assistance	\$2,756,862 (food assistance and in-kind value of referrals and services)	Benchmark met Increase in documentation for In-Kind value of referrals and services contributed to the dramatic increase

Actual Non-Significant Changes: None.

Actual Changes to Metrics/Data Collection: None. The organization will update metrics including benchmarks when new partnerships are established.

Actual Significant Changes: None.

Challenges in Achieving Benchmarks and Possible Strategies: The organization was initially challenged during the early implementation of this activity with establishing formal processes for not only entering into new partnerships, but establishing data sharing agreements, as well as communicating to staff, and setting up internal controls to ensure residents are receiving the exclusion. The organization continues to train those who are entering exclusions into the system, work with its partners, and it has recently convened an internal third party agreement committee to leverage cross departmental support for the partnerships supporting this activity.



Section IV. B. Not Yet Implemented Activities

Not Yet Implemented Activities: MTW activities in which the MTW PHA is not actively engaged but is preparing to implement in the future.

FY2023-1 | Property-based local, non-traditional rental subsidy program (referred to locally as PH-like)

Plan Year Approved, Implemented, Amended

This activity is designed to meet the statutory objectives of increasing housing choices for low-income families. The activity was approved in the FY 2022-2023 MTW Plan and is expected to be implemented in March of FY2024 when the first development that utilizes this activity, Snowden, begins leasing.

Description/Update

Background: The Agency has identified a local housing need for more affordable housing that provides income-based rents for households earning up to 80% AMI. While other housing programs (i.e. tax-credits) offer housing units with relatively affordable rents and reserve these for extremely low income households, the rents are still quite unaffordable for these households. Currently the Agency is estimating that 30% of households on its waiting list have household incomes at or below 15% AMI. An additional 40% are between 15% and 30% AMI.

Under the organization's broader uses of funds authority, Attachment D, the Agency may use MTW funding for local, non-traditional units providing that the activities meet the requirements of the MTW statute. This activity proposed the creation of a new property-based local, non-traditional MTW rental housing program.

This activity leverages existing authorizations in Attachment D and specified in FY2011-1e which allow the agency to invest MTW funds to preserve and expand affordable housing. Local, non-traditional units (LNT) are defined as units that will be rented to or sold to families whose incomes are at or below 80% of AMI, but that are not public housing or project-based Housing Choice Voucher units.

The proposed LNT program will operate in accordance with the Agency's public housing program as codified in the Admissions and Continued Occupancy Policy (ACOP). For consistency and efficiency, all public housing MTW waivers will be applied to this program unless noted otherwise. The LNT program will operate a separate waitlist and establish a local preference for existing public housing residents.

Currently, the Agency owns several real estate properties and plans to self-develop new



multi-family properties at these sites. Below is the list of current new development projects. As the Agency identifies new projects, those will be listed in the Agency's annual plans and/or reports. Projects are also listed in Appendix E: Asset Management Plan.

Expected in FY2024 or later:

- **Snowden Senior Apartments:** a 135-unit new construction apartment complex for seniors 62 years of age and older. The new 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 this new Project-based local, non-traditional rental subsidy program.
- **Woodhill:** a 532-unit family development that is 90% affordable with 479 units reserved at 80% AMI and below and the remaining are market-rate. In FY2021, per FY 2021-1 and FY2015-3, the organization has committed 10 modified project-based vouchers at the property. In addition, the organization has 25 VASH PBVs committed. Per FY2011-1e, the organization has also invested MTW funds for preservation work resulting in 469 units added as local non-traditional units (479 affordable minus 10 MPBVs). Per this activity, 50 of the 469 units will have the PH-like program added and will continue to be counted under LNT.
- **Alazan Courts:** The organization has hired a master planner for this project. Community engagement has begun and the organization anticipates using this program as part of the re-development of the public housing property.
- **Artisan at Springview:** This new development is planned to be a 325 unit community and may include units subsidized by this program.

Impact & Update: This activity has not been implemented yet. The first property which will utilize this activity will be the currently under construction Beacon property, Snowden, which will allocate 54 units as part of this activity. Snowden is currently expected to begin turning buildings in March 2024.

HUD Standard metrics



HC #1: Additional Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.	NA	54	NA	Not yet Implemented



Section IV. C. Activities On Hold

On Hold Activities: MTW activities that were previously implemented, that the MTW PHA stopped implementing, but that the MTW PHA plans to reactivate in the future.

Not Applicable



Section IV. D. Closed Out Activities

The organization is closing out two activities: FY2013-2, which is being superseded by FY2024-1, and FY2020-3, whose function will be repurposed as a waiver to the 14-6 activity.

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

I. Plan Year Approved, Implemented, Closed Out

This activity was approved in FY2012-2013 and implemented in FY 2013-2014. This activity has been amended as follows:

- FY 2014-2015: Removed Family Self-Sufficiency (FSS) from the list of approved self-sufficiency programs due to the Agency’s inability to reconcile FSS program requirements with this waiver.
- FY 2015-2016: Established the requirement that families complete financial literacy classes.

II. Explain why the MTW activity was closed out

This activity was originally implemented to support the Social Innovation Fund (SIF) Jobs Plus Pilot (referred to as Westside Jobs Plus Program)-- which ended services at Alazan and Mirasol on March 31, 2016. Households enrolled in S-EID through this pilot were grandfathered into the incentive and allowed to continue their participation in S-EID until expiration of their term.

This activity is planned for close out during FY2023 and will be superseded by FY2024-01 Elimination of Earned Income Disregard.

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

- Discussion of the final outcome and lessons learned: This activity will be superseded by a new activity, FY2024-01 Elimination of Earned Income Disregard. The organization is anticipating changes as a result of HUD’s HOTMA Final Rule guidelines on January 1, 2024 which will eliminate EID. In the meantime, the organization will utilize the new 24-1 activity. Once the HOTMA change goes into effect, the organization will begin closing out the new 24-1 activity.
- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): Not applicable.
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable):

CE #3 | Decrease in Error Rate of Task Execution

Unit of Measurement	Baseline	Benchmark	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22
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Average error rate in completing a task as a percentage (decrease).	13.22	10.62	13.22	19	16.31	No Data	4.28	4.76	6.35	NA - Covid	10.1
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SS #5: Households Assisted by Services that Increase Self Sufficiency

Unit of Measurement	Baseline	Benchmark	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22
Number of households receiving services aimed to increase self sufficiency (increase).	FY13-FY14: 40	FY13-14: 80										
	FY15: 5	FY15-22: 200	0	80	101	207	196	120	82	25	7	5
	FY16-FY22: 0											

SS #8: Households Transitioned to Self Sufficiency

Unit of Measurement	Baseline	Benchmark	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22
Number of households transitioned to self sufficiency (increase).	0	0	0	0	0	0	1	1	0	0	0



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

I. Plan Year Approved, Implemented, Closed Out

This activity is designed to achieve the MTW statutory objective to reduce cost and achieve greater cost effectiveness in Federal expenditures, by creating administrative efficiencies in the Family Self-Sufficiency Program. The activity was approved in the FY 2019-2020 MTW Plan, and will be closed out in the FY 2022-23 MTW Report.

II. Explain why the MTW activity was closed out

The new FSS final rule eliminated the need for this activity to address the 120-day rule. The modified contract element is still needed due to the FY2014-6 Rent Reform activity. In an effort to streamline activity reporting and group waivers working together, this waiver will be moved under FY2014-6 and the FY2020-3 activity will be closed out in the FY 2023 Report.

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

- Discussion of the final outcome and lessons learned: None.
- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): Not applicable.
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable): Not applicable.

CE #1 | Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	FY20	FY21	FY22
Total cost of the task in dollars (decrease).	FY20: \$1,159	FY20: \$281			
	FY21: \$536	FY21: \$130	\$878.3	\$406.41	\$1,127.46
	FY22: \$1,488	FY22: \$361			



Section V | Planned Application of MTW Funds

Section V. A. | Financial Reporting

Section V. A. i. | Available MTW Funds in the Plan Year

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

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

Sources of MTW Funds include the following:

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

Section V. A. ii. | Expenditures of MTW Funds in the Plan Year

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

Projects	Cumulative Expenditure as of 6/30/2023	
Program Administration and Implementation of MTW Initiatives	\$	2,035,288
Public Housing Operating Shortfall		10,716,839
Expansion of Public Housing Wi-Fi		147,846
Lincoln Predevelopment Costs		231,395
Development of Labor Street Multifamily Property		605,622
Alazan Courts Predevelopment Costs		141,638
Woodhill Bonds Pay-off		5,706,866
Acquisition of San Juan II		900,000
Acquisition of Ravello Apartments		1,584,638
Snowden Development Funding		1,071,465
Bristol at Somerset Loan		1,000,000
Beacon Debt Payoff		12,852,350
Total	\$	36,993,947



Section V. A. iii. | Describe Application of MTW Funding Flexibility

APPLICATION OF “MTW FUNDING” FLEXIBILITY

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

1. Program Administration and Implementation of MTW Initiatives

The organization uses Moving to Work funds to support the Community Development Initiatives Department for MTW program administration and implementation. These funds allow the organization to provide higher quality supportive services to residents than would otherwise be permitted by grant funding alone. In addition, the organization can more effectively engage with partners and leverage resources for the benefit of the residents.

- **Enhanced Resident Engagement:** MTW funds were used to enhance existing resident engagement efforts including hiring a Resident Leadership Coordinator to assist Public Housing residents in forming and running resident councils including additional planning and administrative support for the expansion of resident engagement activities.
- **Food Distributions:** MTW funds were used to continue to assist with food distributions for The organization residents.
- **Jobs Plus Program:** MTW funds were used in addition to grant funds to support the administration of the Jobs Plus Program at Lincoln Heights. The Jobs Plus program helps residents receive training and find employment opportunities. The organization partners with Alamo Workforce Solutions to identify in-demand occupations, as well as employers willing to provide training or educational assistance.
- **Resident Apprentice:** MTW funds also support the Resident Apprenticeship Program which provides meaningful work experience for residents. The organization has found that this program is an effective strategy to engage residents in educational, training, workforce development, and other self-sufficiency programs.
- **ConnectHomeSA:** The Agency uses MTW funds to support ConnectHomeSA. This program provides computer training courses. When residents complete six courses they earn a digital device.
- **Expansion of PH WiFi:** As part of The organization’s Road to Digital Inclusion initiative, MTW funds will be used to narrow the digital divide and bring much needed Internet connectivity and accessibility. This will include broadband service for Public Housing communities.
- **Choice Endowment:** MTW funds were used in conjunction with grant funding to continue supportive services to residents as part of the Choice Neighborhood Initiative.
- **Youth Programming:** MTW funds were used on two partnership projects that will serve The organization youth through educational and afterschool programming onsite at public housing communities.
- **Opportunity Home Affordable Connectivity Outreach Grant Program:** Opportunity Home received a grant from the Federal Communications Commission on 6/7/23. The grant award was for \$125,000 for three years to pay for a Coordinator to sign as many HCV and



PH residents to the Affordable Connectivity Program. The organization is matching \$43,986.38.

SUMMARY:

The work of the Community Development Initiatives (CDI) department is largely focused on fulfilling Opportunity Home's Strategic Goal 1, to empower and equip families to improve their quality of life and achieve economic stability. Accordingly, staff works to provide services onsite and to offer opportunities to create a sense of place and community. Due to reorganization in Opportunity Home, CDI is undergoing a name change and will be referred to as Resident Engagement (RE) in future reporting.

Below is a summary of the department's major accomplishments and activities from July 1, 2022 to June 30, 2023.

Table 1. Summary of CDI Accomplishments from July 1, 2022 to June 30, 2023

Target	Accomplishment	Status
Host 375 events/activities with 4,500 participants.	CDI hosted and assisted 865 events with 9,808 resident participants	Exceeded target
Maintain 30 resident councils	5 active resident councils.	Below Target
8,250 individuals served; \$325,000.00 assistance value quarterly.	1,347 food distribution events with 11,627 total individuals served with an in-kind value of \$1,322,989.81	Exceeded target
750 referrals made quarterly through Resident Opportunities & Self-Sufficiency (ROSS), Family Self-Sufficiency (FSS) program, and Jobs Plus (JP).	10,067 ROSS, FSS, and JP referrals for service made, averaging 2,517 referrals per quarter	Exceeded target
1,200 FSS participants enrolled annually	921 FSS participants enrolled during the fiscal year.	Below target
1 resident council training offered quarterly	0 resident council training offered this fiscal year	Below Target
3 Early Engagement Program sessions with 500 total Public Housing (PH) and Housing Choice Voucher (HCV) participants each quarter	0 - currently in the process of redesigning Program on Hold EEP.	Program on Hold
50 new PH and HCV participants to receive Computer Training	975 Class Hours. 138 Distributed Devices: 65 laptops, 73 monitors and accessories, 16 residents have checked out loaner laptops. 113 ACP Enrollments. 72 properties have public WIFI with over 23,000 documented users.	Exceeded
-	74 ROSS, FSS, and JP residents enrolled in training or education	Ongoing



-	53 ROSS, FSS, and JP residents obtained a certification and 9 earned their high school diploma or GED	Ongoing
-	645 ROSS, FSS, and JP assessments completed and 166 ROSS/JP/FSS service plans created.	Ongoing
-	1787 bundles of school supplies and books were distributed with an in-kind value of \$26,805	Ongoing
-	26 Resident Scholarships awarded totaling \$31,500. 10 Joshua Longoria Passion For Life Memorial Scholarships totaling \$5,000. 38 REACH awards totaling \$1330.00.	Ongoing

CDI HOSTED EVENTS:

Between July 1, 2022 and June 30, 2023, the CDI department hosted 201 events/activities and assisted 664 partner-hosted events, for a total of 865 events with 9,808 resident participants.

Table 2. CDI Hosted and Assisted Events from July 1, 2022 to June 30, 2023

Event Type	PH/HCV Family Events	Elderly/Disabled Events	Total Events
Education	51	62	113
Nutrition	3	13	16
Arts	3	11	14
Employment	10	2	12
Recruitment	50	35	85
Training	3	1	4
Parenting	4	2	6
Leadership	1	2	3
Community Building	22	395	417
Financial Literacy	4	-	4
Digital Literacy	9	27	36
Youth Services	1	-	1
Other/Admin*	7	20	27
Health	17	110	127
Total	185	680	865

* Other/Admin events include those that do not fall into other event types or serve an administrative function. Examples include Registration Events, Rental Assistance Fairs, Fire Safety Presentations, and Transportation events.

FOOD DISTRIBUTIONS:

Table 3. Food Distributions from July 1, 2022 to June 30, 2023

Program Served	Distribution	# Events	# Units Served	In-Kind Amount
Elderly/Disabled Services (EDS)	HOPE Commodities	193	5,253	\$643,755.15
	Commodity Supp.			
	Food Program (CSFP)	192	4,905	\$565,226.58
	Meals on Wheels	0	0	\$0



HEAL (formerly COSA Lunches)	884	1,5491,336	\$89,012.58
Other distributions	1	26	\$520.00
EDS Only Total	1,270	11,73311,520*	\$1,298,514.31
Emergency Distributions**	77	107	\$24,475.50
Total	1,344	11,84011,627	\$1,322,989.91

*# Units Served does not represent the number of unique households served as units were served to many of the same households during separate food distribution events.

** Emergency Food Distributions paid for by Opportunity Home.

REFERRALS FOR SERVICES:

From July 1, 2022 to June 30, 2023, CDI department's Resident Opportunities and Self-Sufficiency (ROSS), Family Self-Sufficiency (FSS), and Jobs Plus (JP) programs made a total 10,067 referrals for services, averaging 2,517 referrals each quarter.

Table 4. ROSS, FSS, and JP Program Service Referrals from July 1, 2022 to June 30, 2023

Referral Type	No. of Referrals
Basic Needs Related Services	205
Childcare Services	66
Digital Inclusion Related Services	118
Education Related Services	1,117
Employment Related Services	5,022
Financial Management Related Services	240
Food Services	140
Health and Safety Related Services	79
Housing or Utility Services	183
Legal Services	16
Other*	2,795
Transportation Services	55
Youth Services	31
Total	10,067

* Other includes but is not limited to: Community Service, FSS Program, Holiday Gift, MTW Enrollment, Public Assistance, Resident Ambassador Program, Resource Fair, ROSS, Section 3 Program.

- 2. Public Housing Operating Shortfall:** MTW funds were used to mitigate Public Housing losses for fiscal year 2023. The funds enabled Public Housing to fulfill financial obligations and sustain operations of the program.
- 3. Expansion of Public Housing Wi-Fi:** As part of the Opportunity Home Road to Digital Inclusion initiative, MTW funds were used to narrow the digital divide and bring much needed Internet connectivity and accessibility to the Public Housing portfolio. This includes funding bandwidth, WI-FI management, installation, labor and support of the expanded network.
- 4. Lincoln Predevelopment Costs:** MTW funds were used for pre-development activities including a master planner, appraisals, architectural services, environmental assessments, legal counsel, surveys, and development consultants for Lincoln Heights, a 338 units public housing development.



5. **Development of Labor Street Multifamily Property:** MTW funds were used towards the construction of the 100 Labor Multifamily Redevelopment Project.
6. **Alazan Courts Predevelopment Costs:** MTW funds were used to begin the master planning process for the redevelopment of the Alazan Courts including a commitment to being responsive to the needs of the residents, neighborhood and surrounding community including building higher quality housing.
7. **Woodhill Bonds Pay-off:** MTW funds were used to pay the balance of bonds. Woodhill is a 532-unit multi-family asset and is expected to add 416 new households to the LNT reporting depending on tenant-based voucher leasing and occupancy.
8. **San Juan II Acquisition:** MTW funds were used to memorialize the loan from Las Varas PFC to the San Antonio Development Corporation (SAHDC). The property has a total of 252 units under the Local, Non-Traditional MTW project based program and is expected to add an estimated 61 new households to the LNT reporting depending on tenant-based voucher leasing and occupancy.
9. **Ravello Apartments:** MTW funds were used to pay for the acquisition and long term capital repairs and improvements at the Ravello apartments. The property has a total of 252 units under the Local, Non-Traditional MTW project based program and is expected to add an estimated 189 new households to the LNT reporting depending on tenant-based voucher leasing and occupancy.
10. **Snowden Development Funding:** MTW funds were used for the development and construction of Snowden Apartments. The property will have a total of 135 units; 54 units will be under the new Income-based Rental Assistance Program (MTW Activity 23-1) while the remainder will be tax-credit and reported under the Local, Non-Traditional MTW project based program. An estimated total of 135 new households will be added to the LNT reporting depending on tenant-based voucher leasing and occupancy.
11. **Bristol at Somerset Loan:** MTW funds were invested in Bristol at Somerset as a bridge loan. The property has a total of 348 units under the Local, Non-Traditional MTW project based program and is expected to add 348 new households to the LNT reporting depending on tenant-based voucher leasing and occupancy.
12. **Beacon Debt Payoff:** MTW funds were used to pay off high-interest debts including transaction costs and minimal outstanding balances for properties in the Beacon Communities portfolio.
 - a. Bella Claire: 67-unit, multi-family asset and is expected to add 62 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
 - b. Castle Point: 220-unit, multi-family asset and is expected to add 203 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
 - c. Churchill Estates: 40-unit, multi-family asset and is expected to add 34 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
 - d. Claremont: 4-unit, multi-family asset and is expected to add 2 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
 - e. Homestead Apartments: 157-unit, multi-family asset and is expected to add 128 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
 - f. Monterrey Park: 200-unit, multi-family asset and is expected to add 188 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.



- g. La Providencia: 90-unit, multi-family asset and is expected to add 85 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
- h. Towering Oaks: 128-unit, multi-family asset and is expected to add 64 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.
- i. Warren House: 7-unit, multi-family asset and is expected to add 6 units to the LNT reporting depending on tenant-based voucher leasing and occupancy.

Section V. A. | Local Asset Management Plan

- i. Is the MTW PHA allocating costs within statute? Yes
- ii. Is the MTW PHA implementing a local asset management plan (LAMP)? No
- iii. Has the MTW PHA provided a LAMP in the appendix? No
- iv. If the MTW PHA has provided a LAMP in the appendix, please describe any proposed changes to the LAMP in the Plan Year or state that the MTW PHA does not plan to make any changes in the Plan Year. N/A



Section VI | Administrative

Section VI. A. | Reviews, Audits and Inspections

Opportunity Home had 518 EHS (Exigent Health and Safety) issues that required action. Most EHS issues were related to missing or non-functioning smoke detectors or blocked egress. The organization abated all within 24 hours.

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

Section VI. B. | Evaluation Results

Opportunity Home is not currently engaged in any organization-wide evaluations of its MTW program. There were no further PHA-directed evaluations during FY23.

Section VI. C. | MTW Statutory Requirement Certification

See the following page.

Section VI. D. | MTW Energy Performance Contract (EPC) Flexibility Data

Not Applicable.



Certification of MTW Statutory Compliance

Opportunity Home San Antonio hereby certifies that it (the organization) has substantially met the three statutory requirements of:

1) Assuring that at least 75 percent of the families assisted by the organization are very low-income families: At fiscal year-end, 98% of public housing and voucher households were very low-income (<50% AMI). During the fiscal year, 89% of new admissions across all programs were very low-income (<50% AMI).

	Total Households	Below 50% AMI	% Below 50% AMI
Public Housing	5,484	5,384	98%
Vouchers	10,381	10,163	98%
Total	15,865	15,546	98%

New Admissions	Total Households	Below 50% AMI	% Below 50% AMI
Public Housing	548	535	98%
Vouchers	1,048	1,036	99%
LNT	286	99	35%
Total	1,882	1,670	89%

2) Continuing to assist substantially the same total number of eligible low-income families as would have been served had the amounts not been combined: The organization's FY2023 MTW families served (annual average) is 17,530 out of 18,170 MTW adjusted baseline denominator (96%). Per PIH 2013-2, the organization is in the Substantially Compliant – Nominal Dip determination.

	MTW Baseline	FY2023 Average	MTW Baseline Compliance Calculation*
Public Housing	5,749	5,523	96%
Vouchers	12,421	10,290	83%
LNT at Admissions	--	1,756	--
Total	18,170	17,530	96%

*Calculations follow PIH 2013-02 Baseline Methodology

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



Mix of Family Sizes Served	MTW Baseline	FY2023 Percentage (FYE)	Absolute Change	Percent Change
1-person	36%	41%	5%	15%
2-person	16%	19%	3%	20%
3-person	18%	15%	-3%	-16%
4-person	15%	12%	-3%	-19%
5-person	9%	7%	-2%	-23%
6-person+	7%	5%	-2%	-24%


Ed Hinojosa, Jr. President & CEO

9/29/23
Date





MTW Report

FY22-23

October 18, 2023



Move to Work Designation

Overview

Allows Opportunity Home to *Improve the lives of our residents by providing quality affordable housing and building sustainable, thriving communities* in ways that are different than other PHAs

MTW Toolbox

- 1 Regulatory Waivers
- 2 Funding Fungibility

Funding Fungibility

MTW SOURCES OF FUNDS

Dept of Housing and Urban Development



MTW USES OF FUNDS



Statutory Objectives



Cost Efficiency/ Effectiveness

Reduce cost and achieve greater cost effectiveness in Federal expenditures.



Housing Choice

Increase housing choices for low income families.



Self-Sufficiency

Give incentives to families with children where the head of household is working, seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient.

Annual Process

MTW Report

Opportunity Home submits the annual MTW Report to HUD on or before Sept. 30 every year.

The report is submitted using HUD Form 50900 and provides updates on the use of MTW waivers and the use of MTW funds.

JULY - SEPT.

- Policy and Planning facilitates end-of-year review meetings for all MTW activities
- Departments submit data according to form requirements

SEPT. 30

- Submit report to HUD

OCT. - JUNE

- HUD Review and Acceptance

General Operating Information

Key Statutory Stats

- 97% serving substantially the same
- 98% of PH and AHP households are very low income (50% AMI)
- 89% of new admissions in PH, AHP, and LNT are very Low income (50% AMI)

MTW Housing Inventory Changes

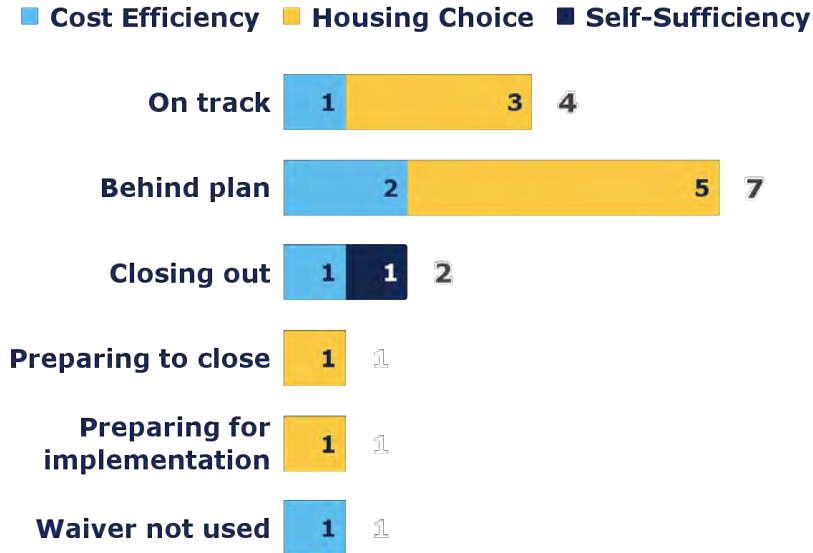
- Public Housing: No changes
- MTW Vouchers: Added 70 Fair Share vouchers
- Local Non-Traditional: Added 1,187 unit months leased

Other Operating Stats

- 97,049 on a waitlist
- \$11M in Public Housing capital expenditures

MTW Activities

Use of Regulatory Waivers



Four activities are meeting metric benchmarks (On track)

Seven activities are meeting some but not all metric benchmarks (Behind plan)

- Challenges included voucher utilization, low voucher success rates, long voucher search times, and elevated error rates in file processing due to historically high turnover

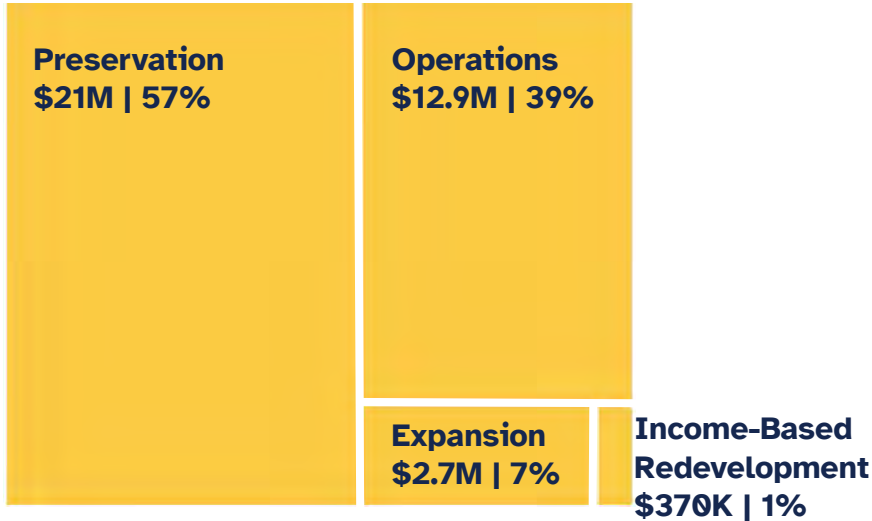
Two activities are being closed out

- New HUD rules negate need for waivers and supporting grants end

Zero activities are off track (meeting none of the benchmarks)

MTW Initiatives

Use of MTW Funds



Housing Preservation

- Acquisition of Ravello, San Juan II, and investments in Beacon Communities properties

Housing Expansion

- Bristol at Somerset, 100 Labor, Snowden

Income-Based Redevelopment

- Alazan and Lincoln Pre-development

Operations

- Resident services program administration, Public Housing operations, and expansion of WiFi

Next Steps

HUD Review

The FY2023 MTW Report is currently under review by HUD.

Approval is anticipated by June 2024.

FY2025 Planning

Start the planning process by using FY2023 MTW Report's results

- Incorporate resident feedback gathered from strategic plan surveys
- Align the plan with the priorities set by the strategic plan, values, and evaluation results
- Ensure plan is responsive and supportive of the implementation of HOTMA changes
- Coordinate with internal departments on
 - Program policy updates
 - Capital plans
 - Housing expansion plans

Questions?

Decade of Demographics

Today

01

Background

02

Demographic Trends

03

Geographic Distributions

04

Mobility Patterns

Background

Our Demographic Tracking Journey and What's Ahead



Page 150 of 240

2010-2014

Policy and Planning Data Program

2012-2015

3 Demographic Reports
2 Income Profile Reports

2016

Established an ongoing Demographic Tracker

2023

A decade of data in the tracker

2024

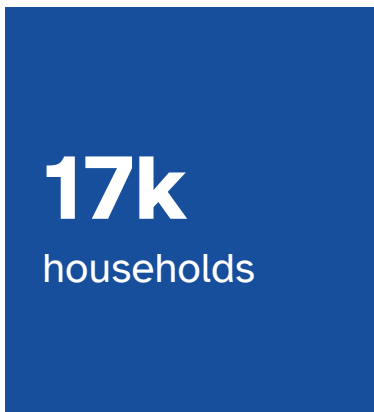
Automate processing in the warehouse

2025

Migrate the tracker to a more mature visualization tool and make it available in a Data Portal

Who We Serve

Public Housing and Voucher Programs serve over **42,000 individuals**



94%

with one head
of household

46%

with children

2.5

household size

\$11k

Median income

52%

with fixed income
(SS, SSI, Pension)

32%

with earned
income
(Wages)

Who We Serve (2014 to current)

Public Housing and Voucher Programs

94%

with one head of household

15,760 householders

▲ 1.4%

Trendline



46%

with children

7,600 households

▼ 7.8%

Trendline



2.5

household size

▼ 0.2%

Trendline



\$11k

Median income

▲ \$530

Trendline



52%

with fixed income

8,700 households

▼ 2.1%

Trendline



32%

with earned income

5,300 households

▲ 1.8%

Trendline



(SS, SSI, Pension)

*2015 to current

(Wages)

*2015 to current

Who We Serve (2014 to current)

Public Housing and Voucher Programs

94%

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5,300 households

▲ 1.8%

Trendline



(Wages)

*2015 to current

Population Pyramid Comparison

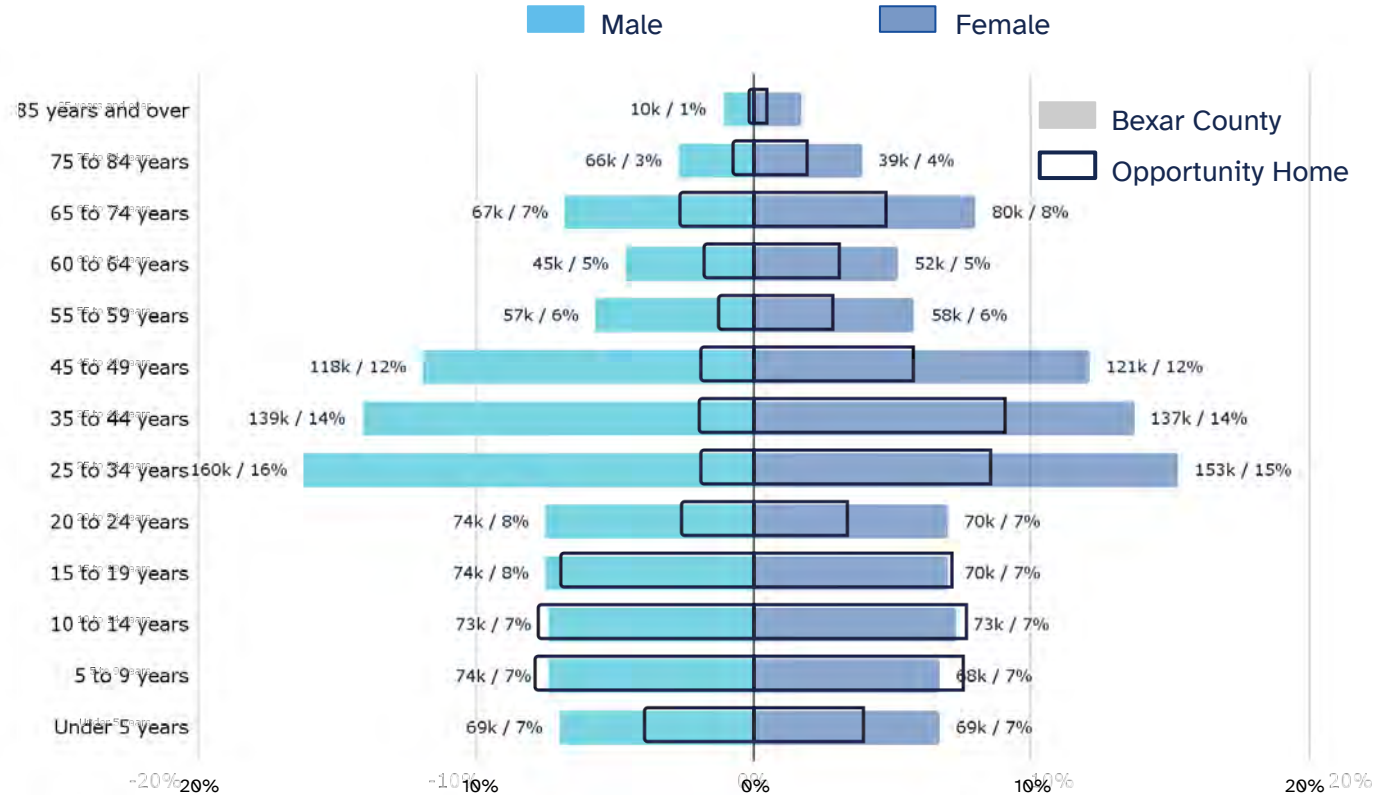
Age-Sex Composition

Bexar County

Opportunity Home

1

Resident population does not have the same composition as the county.



Aging Population

2012 vs 2023 Age-Sex Population

Proportions

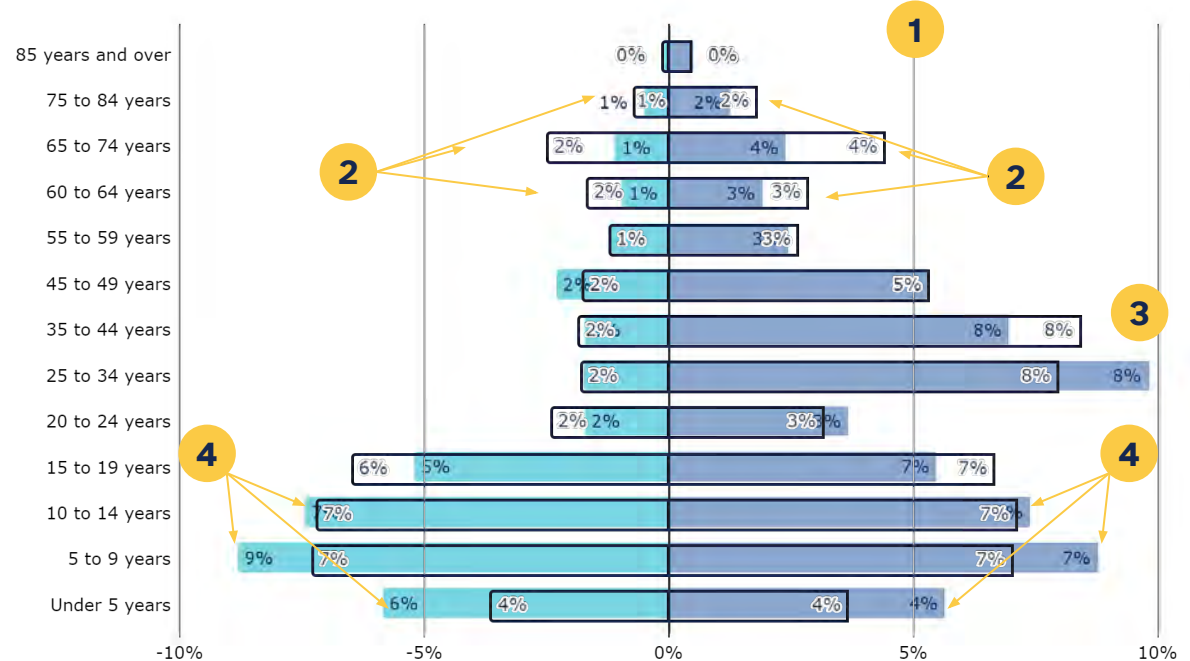
Opportunity Home Residents by Age and Sex Proportions

Public Housing and Assisted Housing Program Residents, 2012 and 2023



Key Observations

- 1** The majority of adults continue to be female
- 2** Serving a higher proportion of older adults (60+)
- 3** Serving a higher proportion of females who are 35-44 years old and a corresponding lower proportion of 25- to 34-year-olds
- 4** Serving a lower proportion of 0- to 14-year-olds



Who We Serve (2014 to current)

Public Housing and Voucher Programs

94%

with one head of household

15,760 householders

▲ 1.4%

Trendline



46%

with children

7,600 households

▼ 7.8%

Trendline



2.5

household size

▼ 0.2%

Trendline



\$11k

Median income

▲ \$530

Trendline



52%

with fixed income

8,700 households

▼ 2.1%

Trendline



(SS, SSI, Pension)
*2015 to current

32%

with earned income

5,300 households

▲ 1.8%

Trendline



(Wages)
*2015 to current

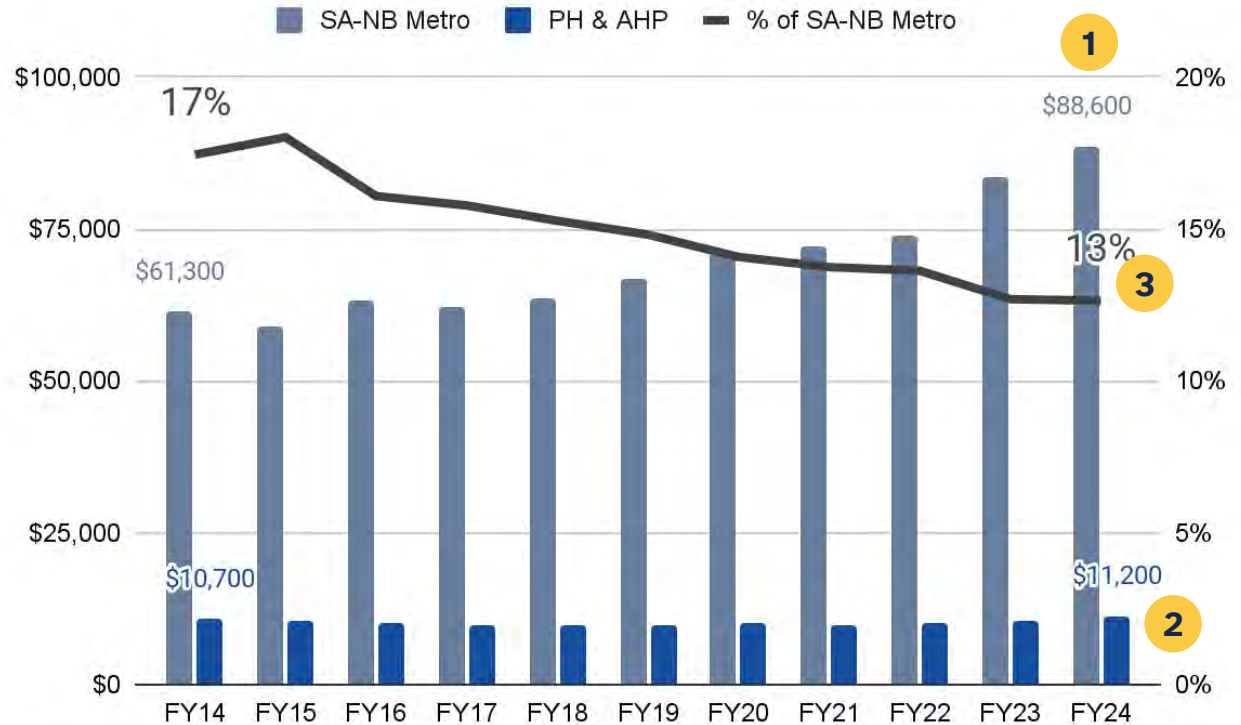
Area Median Income (AMI)

2014 to Present Trends

San Antonio - New Braunfels Metro Area

Residents in PH & AHP

- 1** Local area income is increasing
- 2** Resident income is not increasing
- 3** Resident income as a percentage of local income has decreased by **4%**



Resident Income by Income Profile

2016 to Present Trends

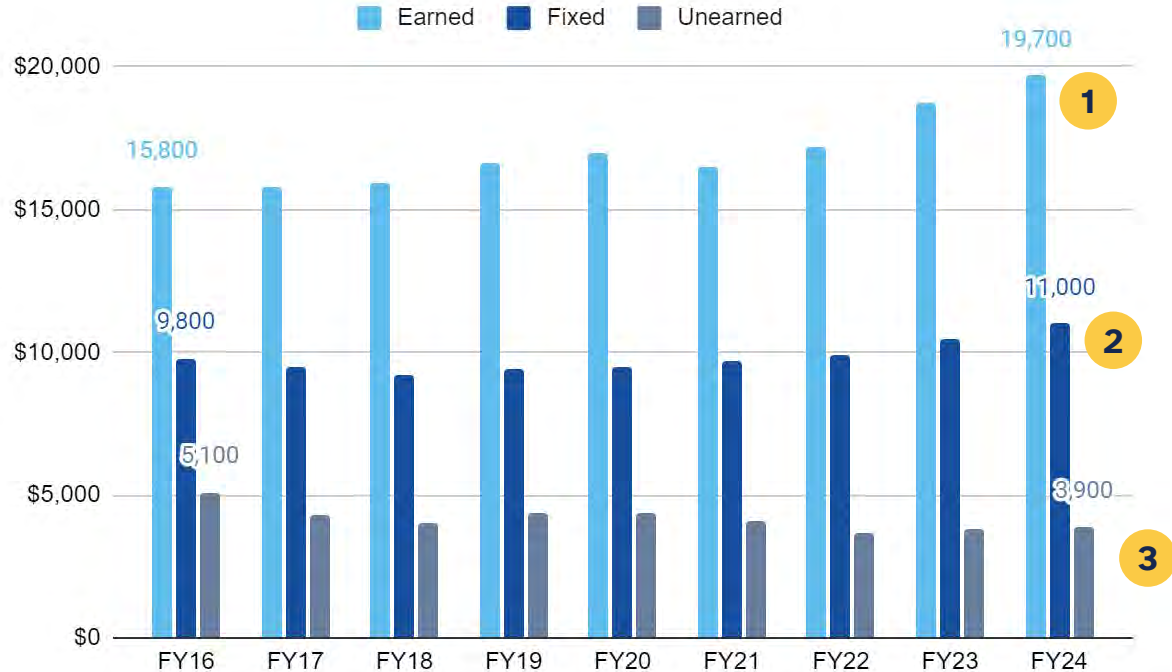
Key observations

- 1 Earned income households have experienced a 25% increase in median household income (+\$3,900)
- 2 Fixed income households have experienced a 12% increase (+\$1,200)
- 3 Unearned income households have experienced a 24% decrease (-1,200)

Earned: households where at least one member is earning a wage and/or receiving unemployment benefits

Fixed: households with at least one member of the household receiving fixed income and no member is receiving earned income and/or unemployment benefits

Unearned: households receiving unearned income or no income. These households do not have any earned, fixed, or unemployment income



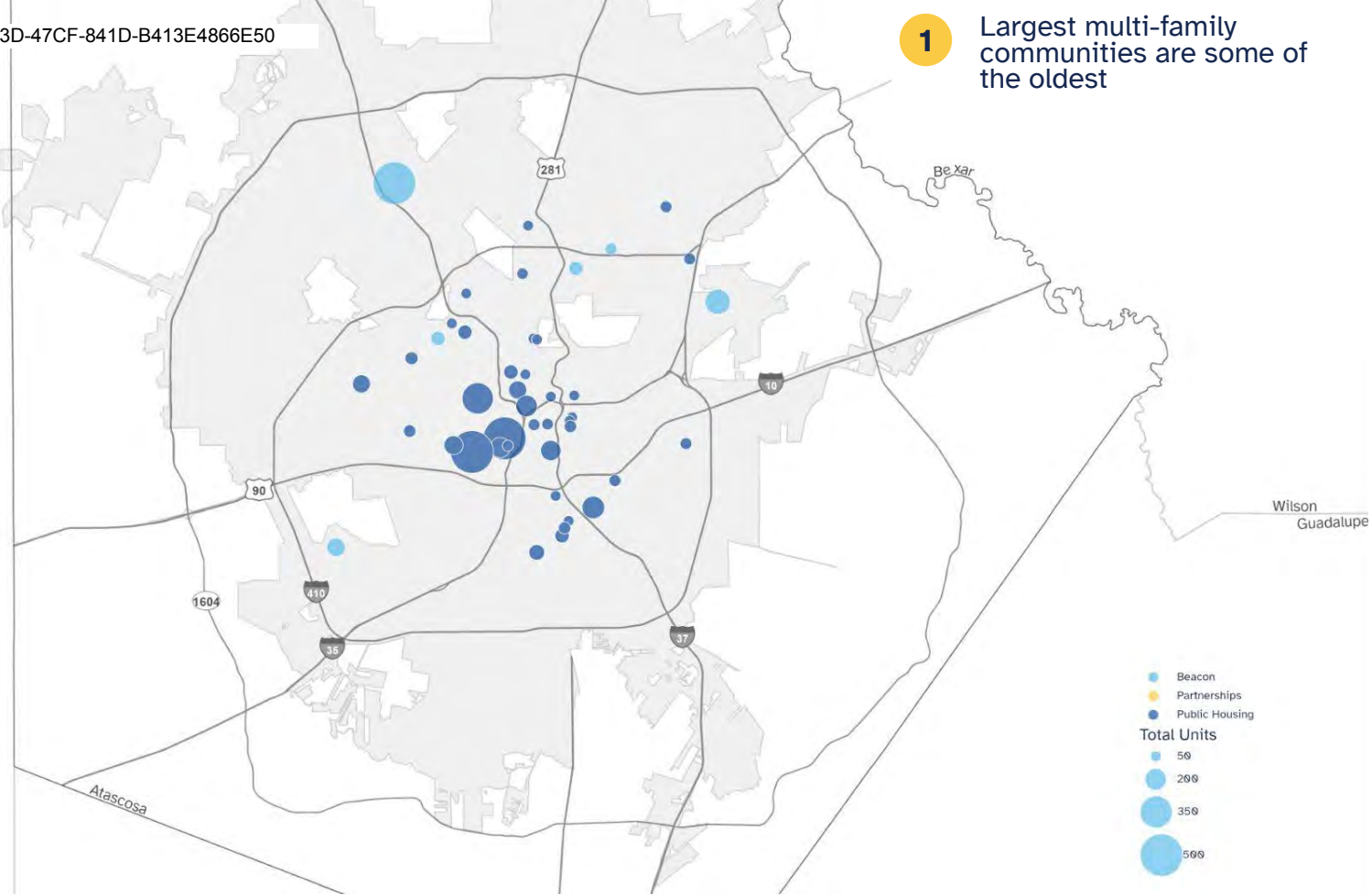
Current Property by Year Built and Total Units

Geographic Distributions

1

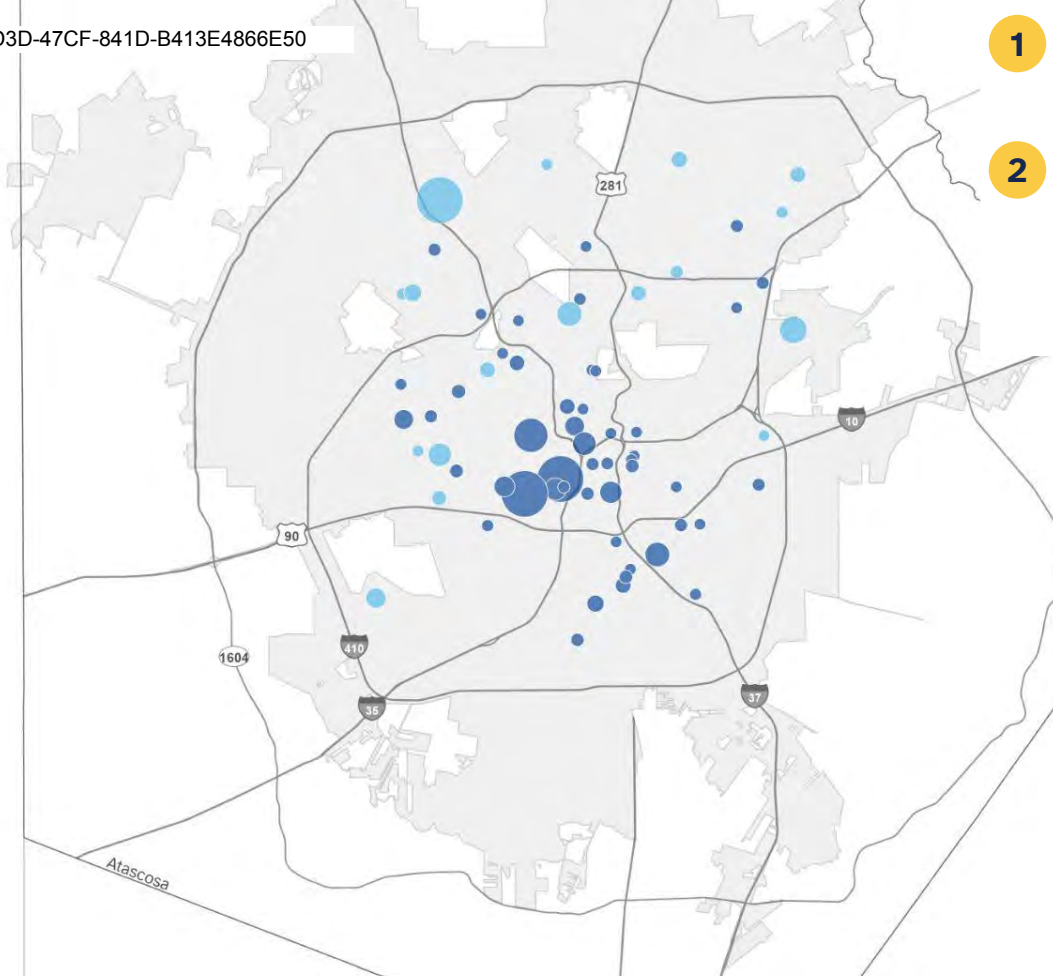
Largest multi-family communities are some of the oldest

1930-1970



Bandera

1980-1990



1

Largest multi-family communities are some of the oldest

2

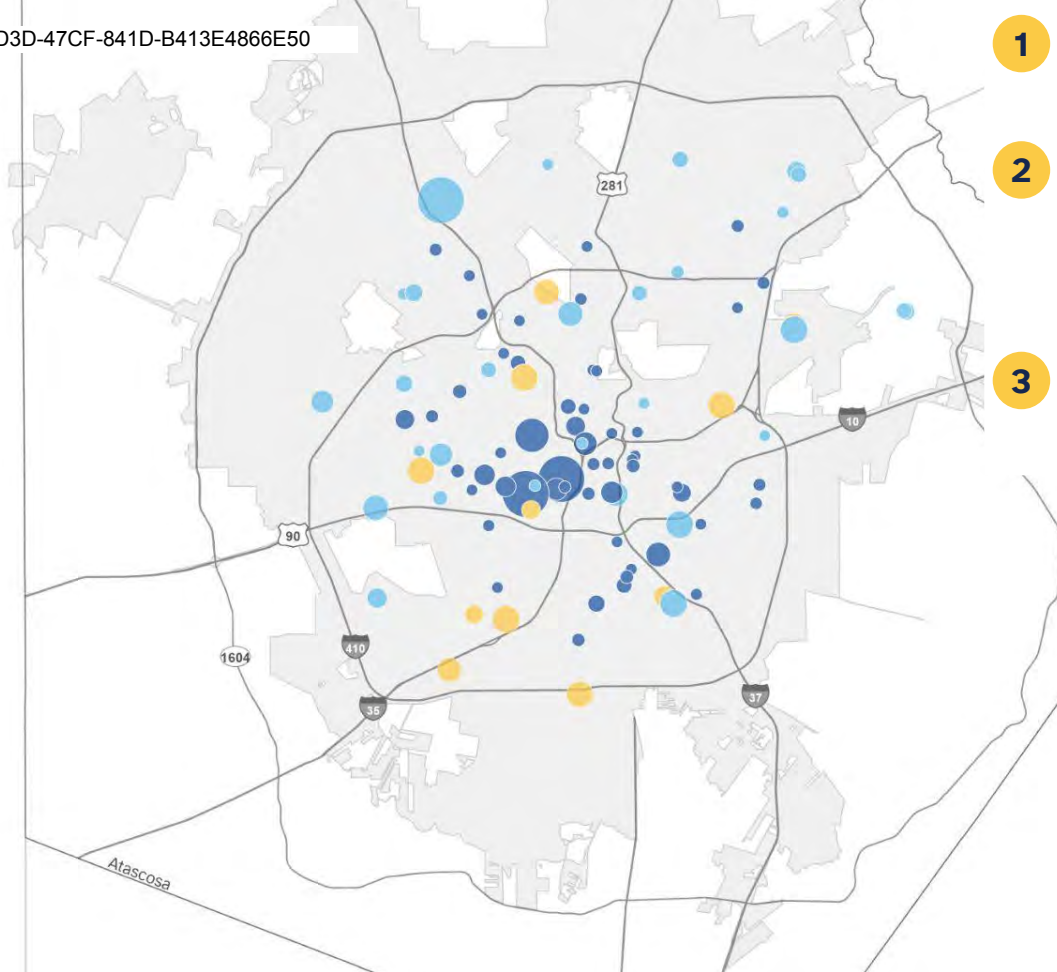
Distribution of unit inventory staying mainly within Loop 410, but see some smaller properties just outside Loop 410 to the north



Wilson
Guadalupe

Bandera

2000s



1

Largest multi-family communities are some of the oldest

2

Distribution of unit inventory staying mainly within Loop 410, but see some smaller properties just outside Loop 410 to the north

3

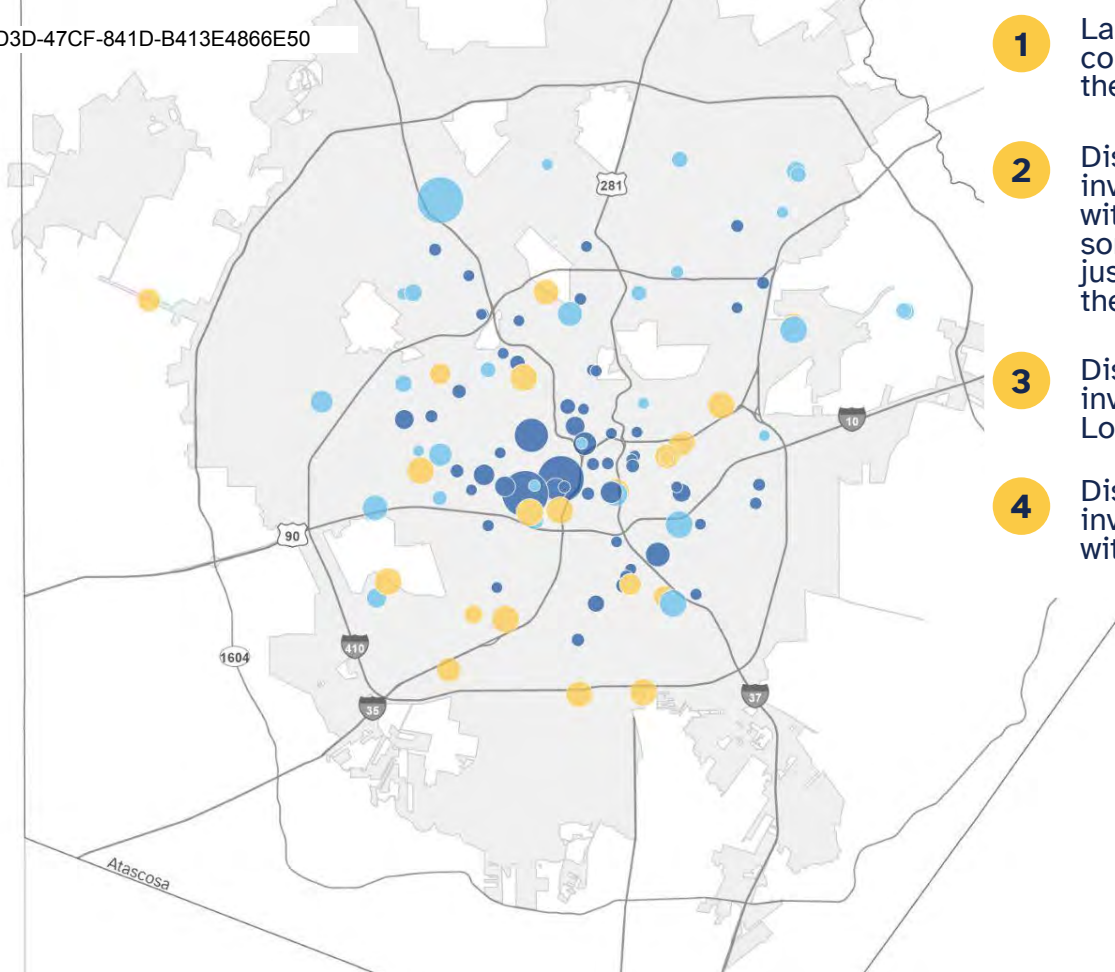
Distribution of unit inventory mainly within Loop 410

Wilson
Guadalupe



Bandera

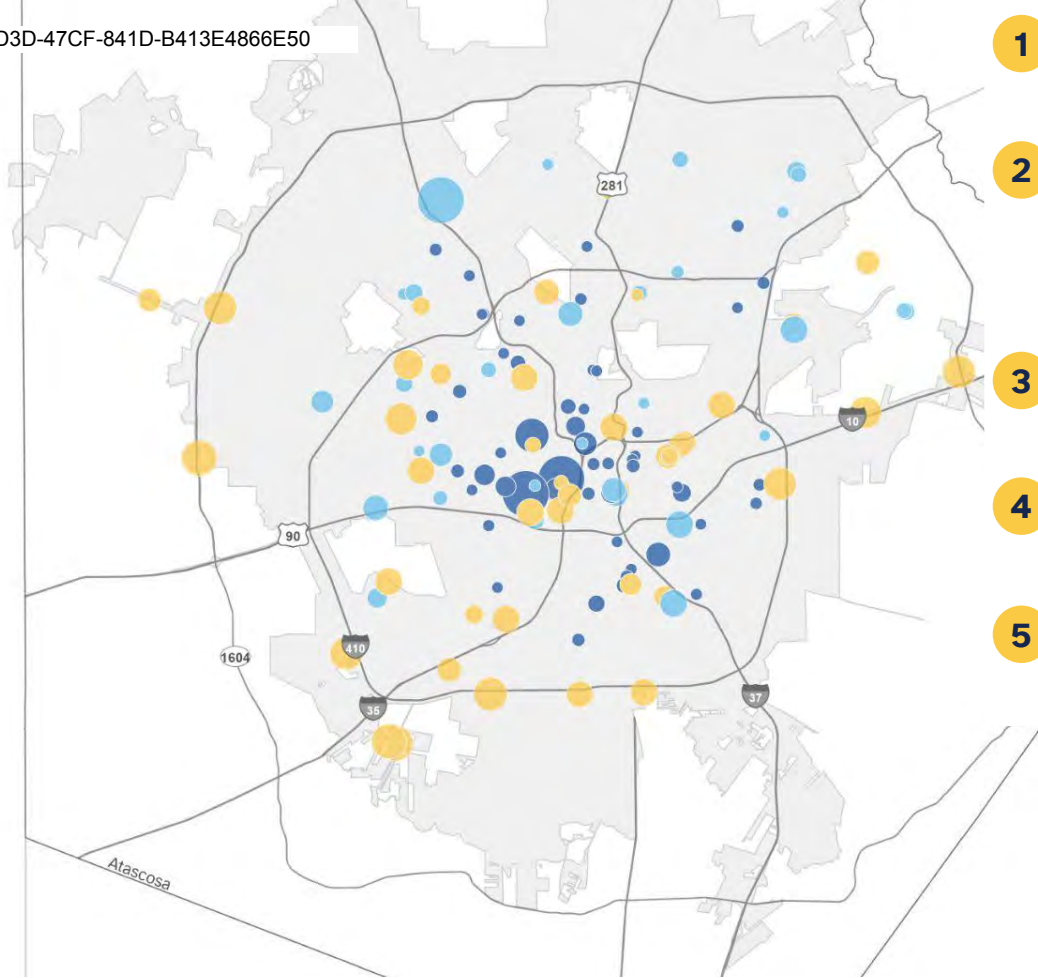
2010s



- 1 Largest multi-family communities are some of the oldest
- 2 Distribution of unit inventory staying mainly within Loop 410, but see some smaller properties just outside Loop 410 to the north
- 3 Distribution of unit inventory mainly within Loop 410
- 4 Distribution of unit inventory staying mainly within Loop 410



2020s



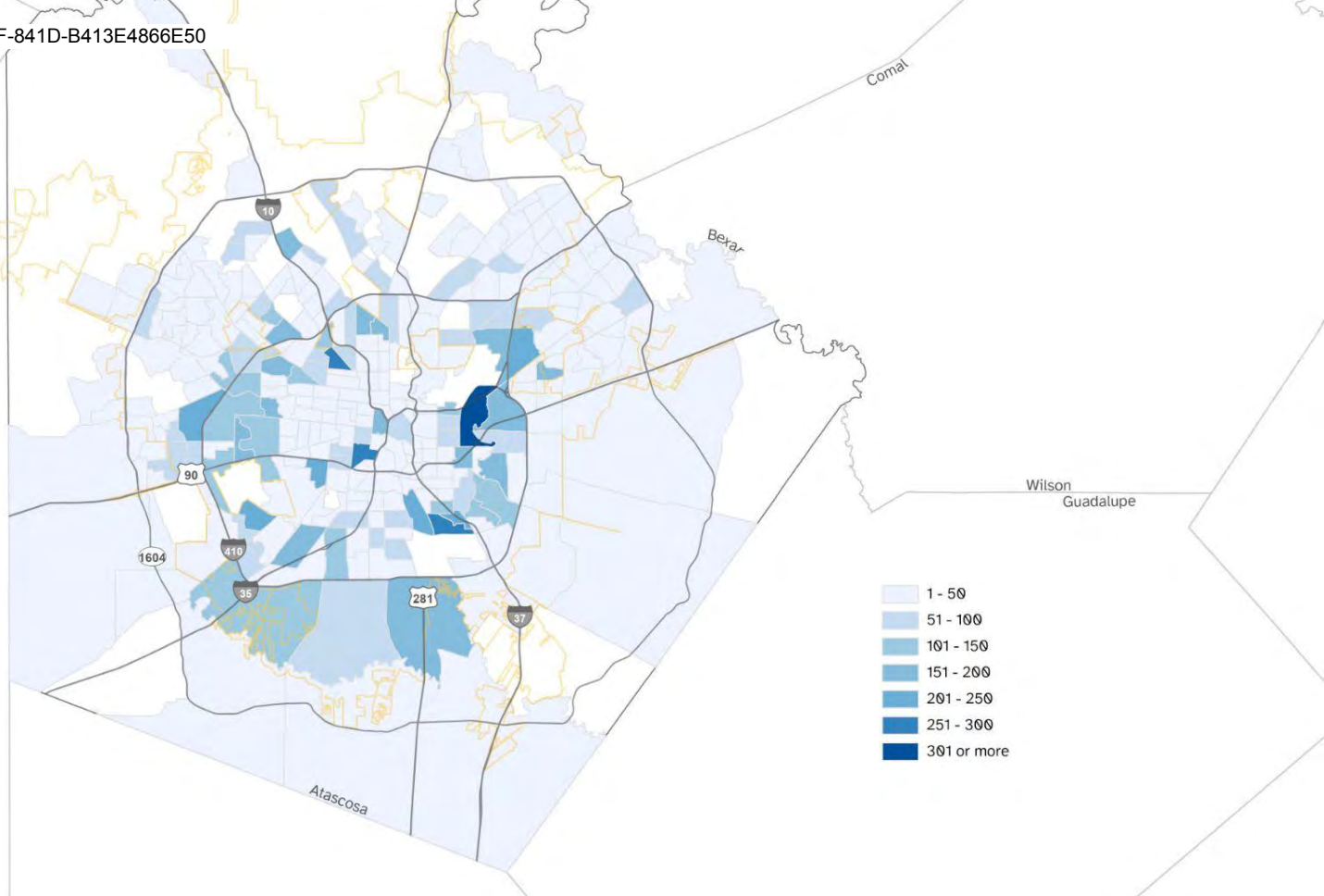
- 1 Largest multi-family communities are some of the oldest
- 2 Distribution of unit inventory staying mainly within Loop 410, but see some smaller properties just outside Loop 410 to the north
- 3 Distribution of unit inventory mainly within Loop 410
- 4 Distribution of unit inventory staying mainly within Loop 410
- 5 Distribution of unit inventory shift to the west, south, and east -- but not the north, northeast



Voucher Distribution Trends (2017 to present)

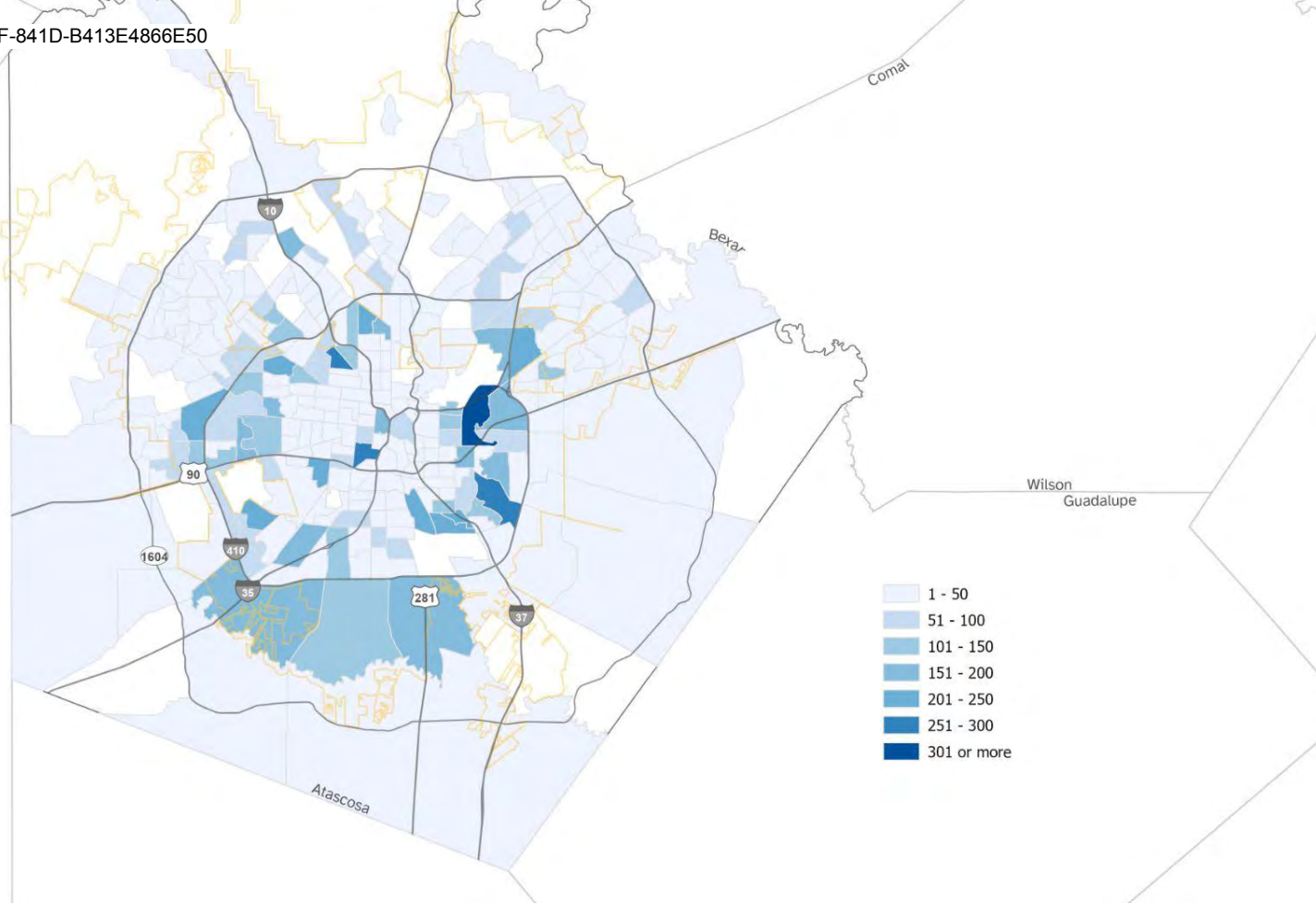
Geographic Distributions

Medina
2017

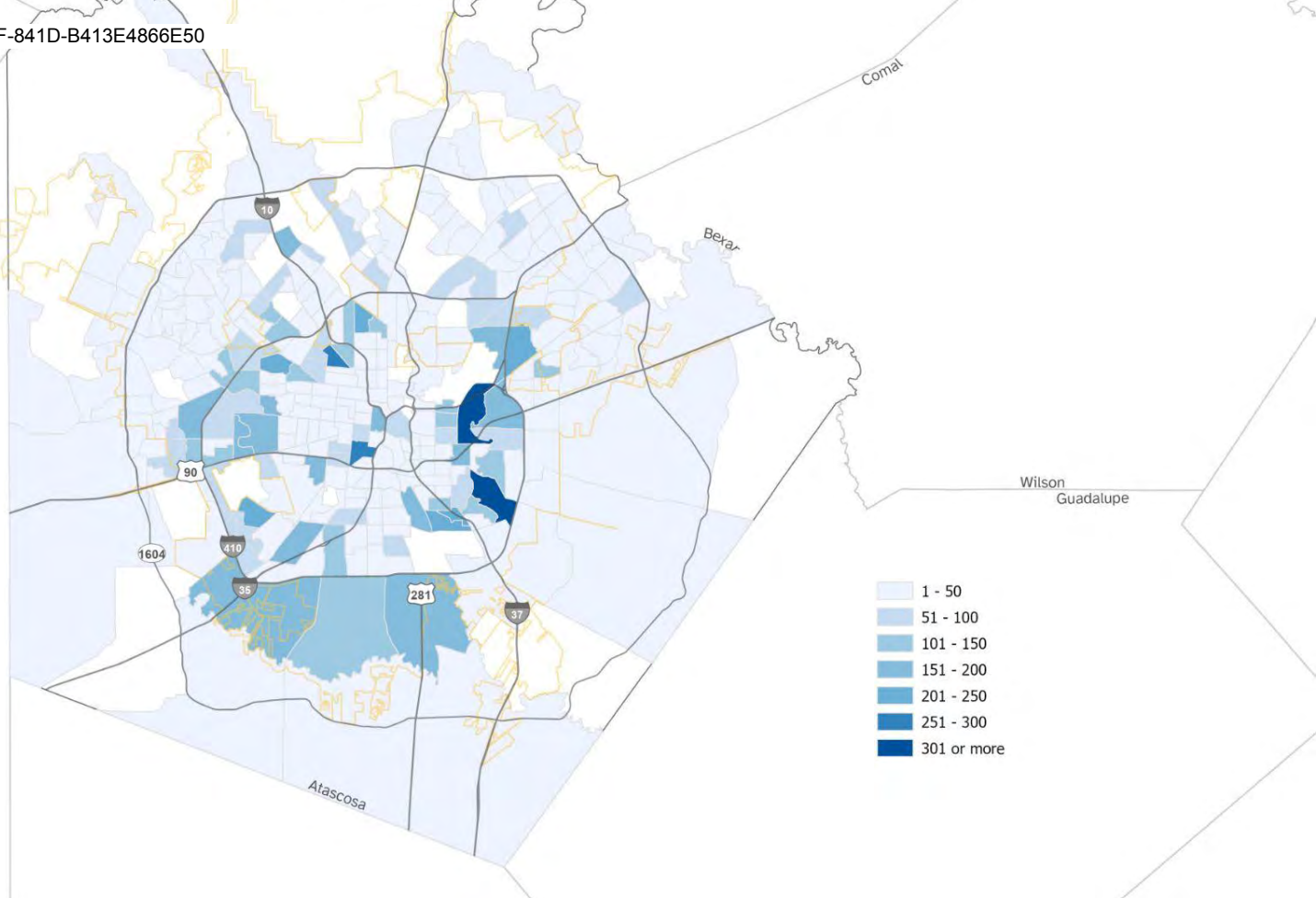


- 1 - 50
- 51 - 100
- 101 - 150
- 151 - 200
- 201 - 250
- 251 - 300
- 301 or more

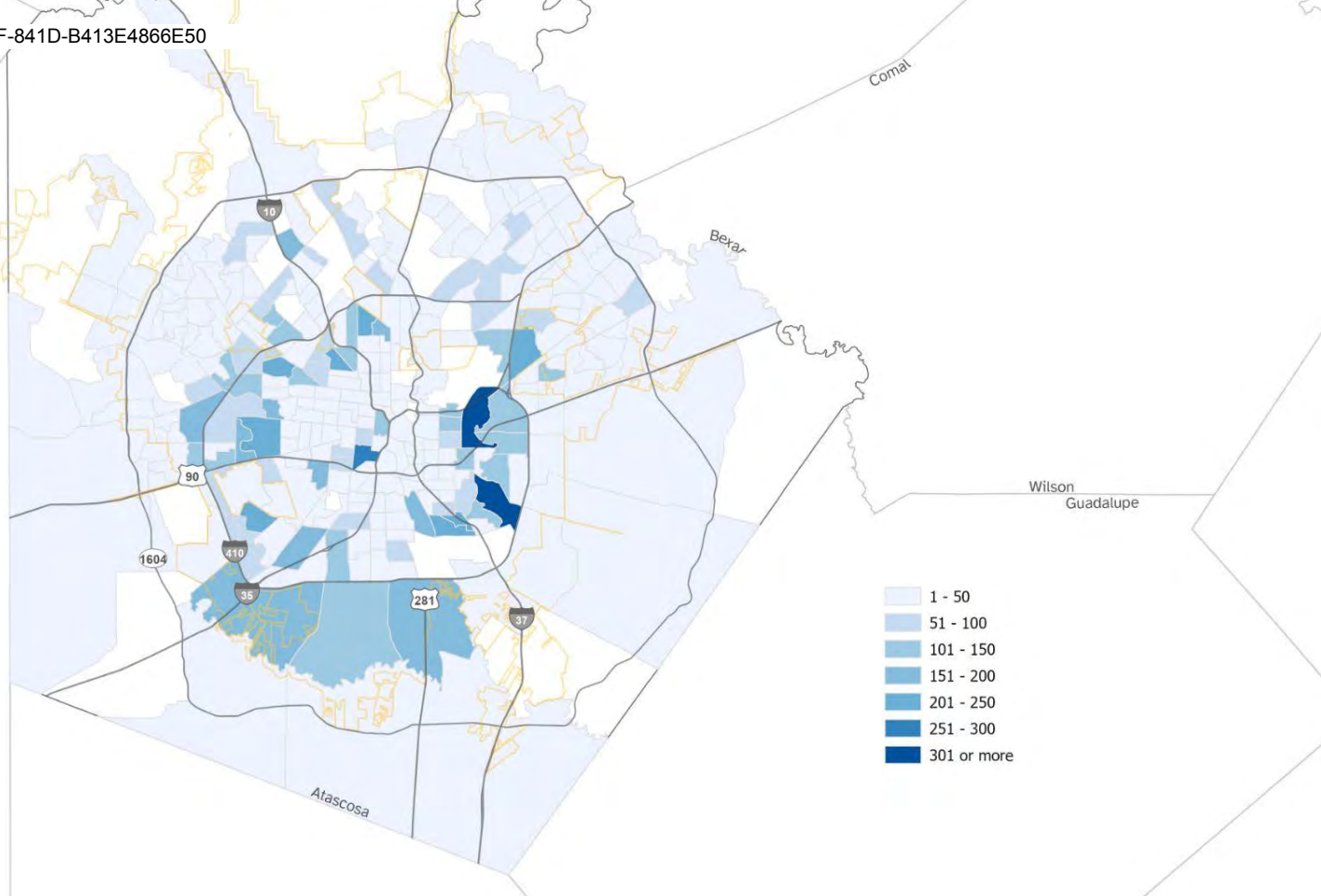
Medina
2018



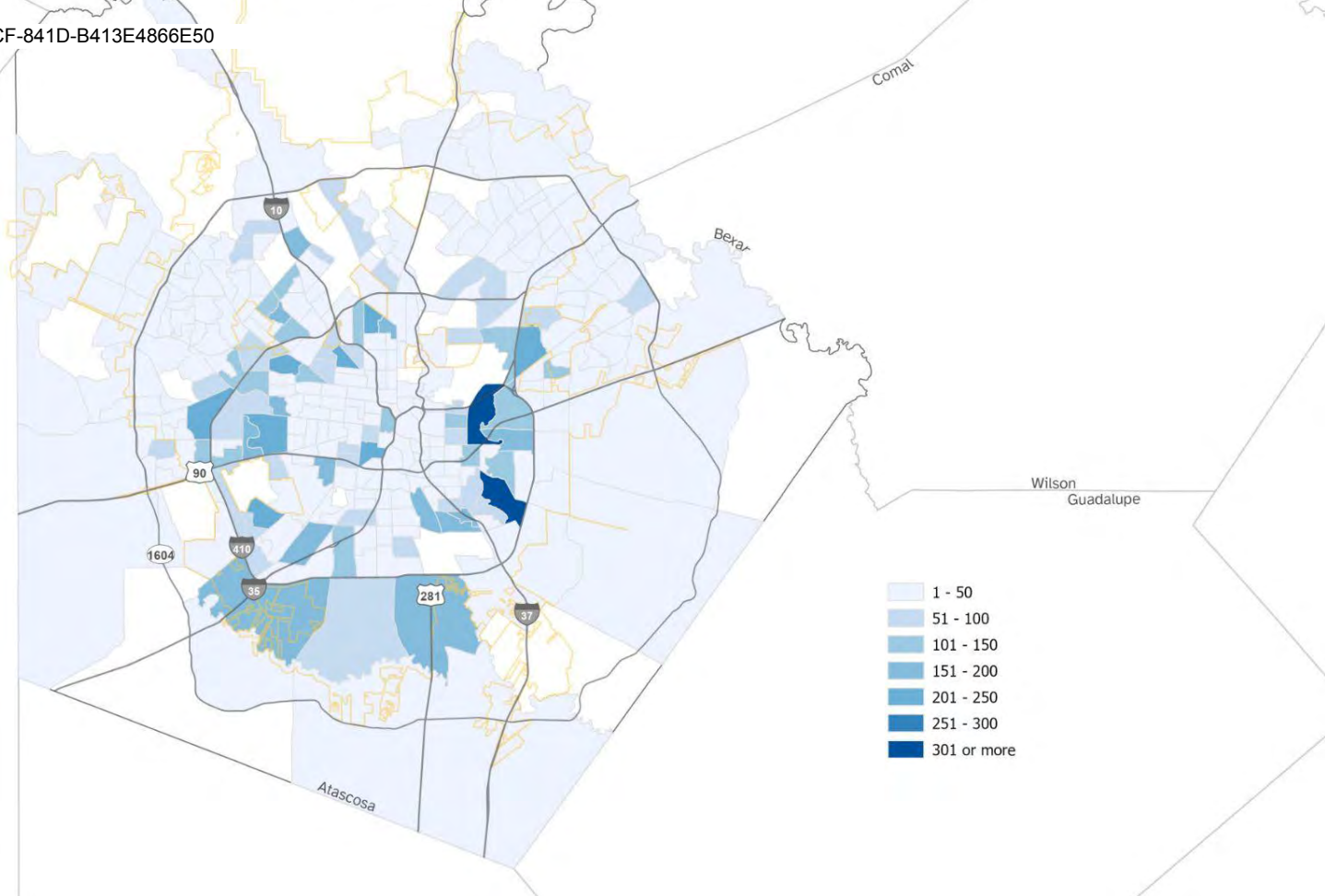
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2019



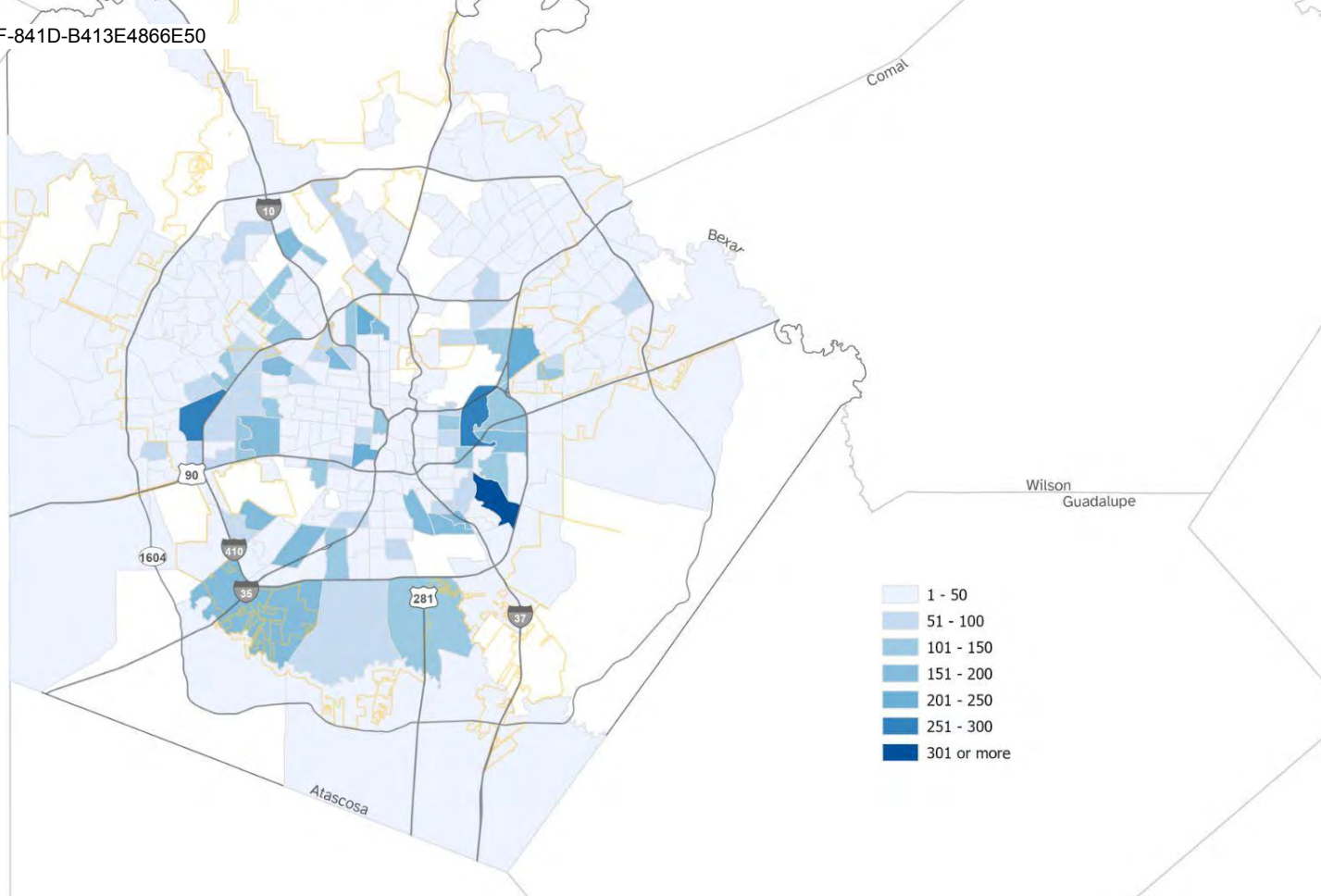
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2020



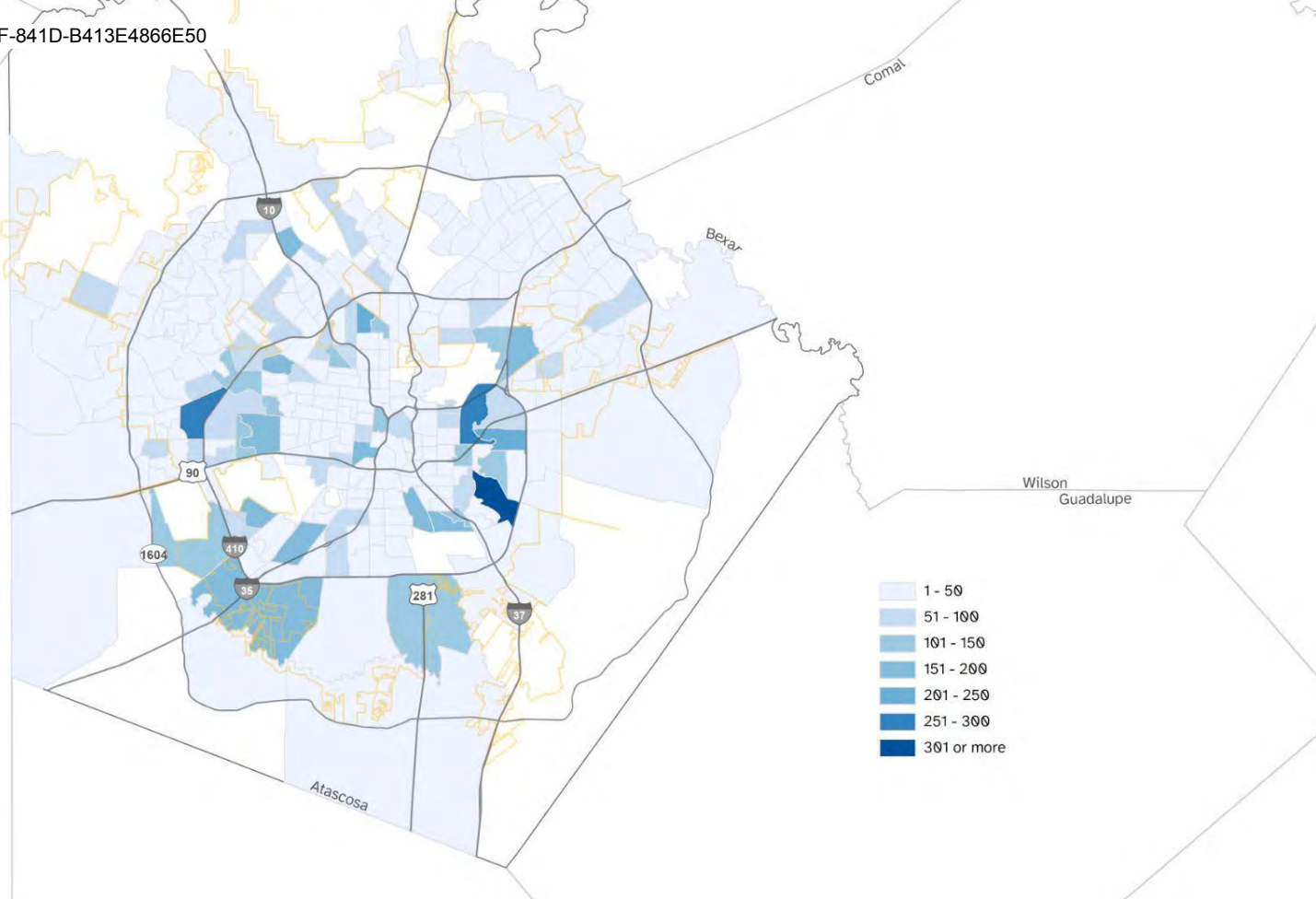
Medina
2021



Medina
2022

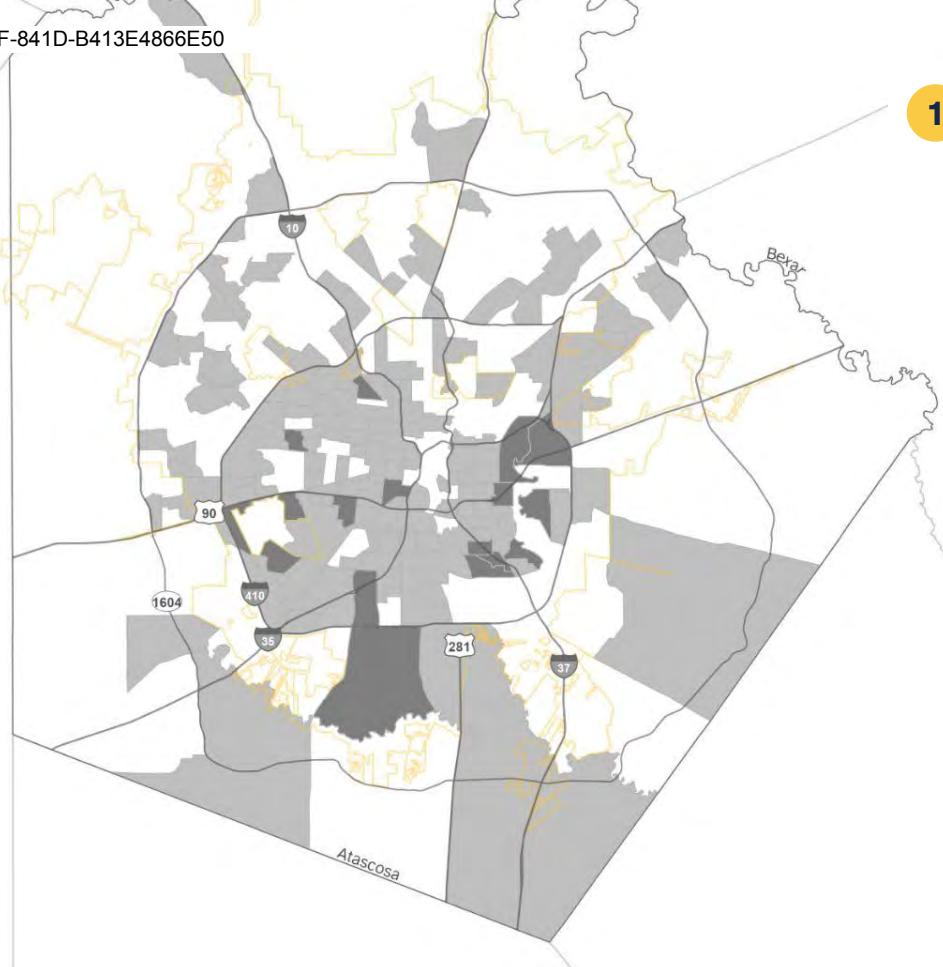


Medina
2023



1

Decreasing trends in voucher utilization inside Loop 410 and in other pockets outside Loop 410



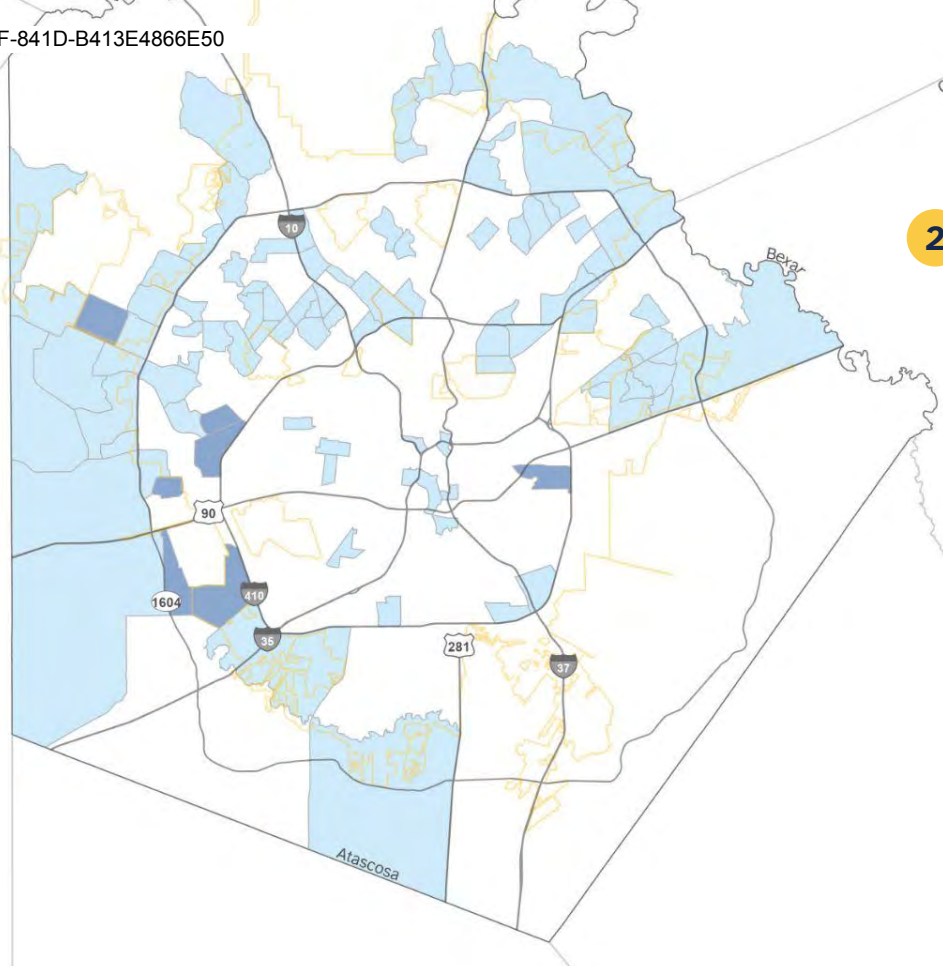
■ 50 vouchers or more decrease
■ Less than 50 voucher decrease

Medina

Comal

Bexar

Wilson
Guadalupe



2

Increasing trends in voucher utilization outside Loop 410

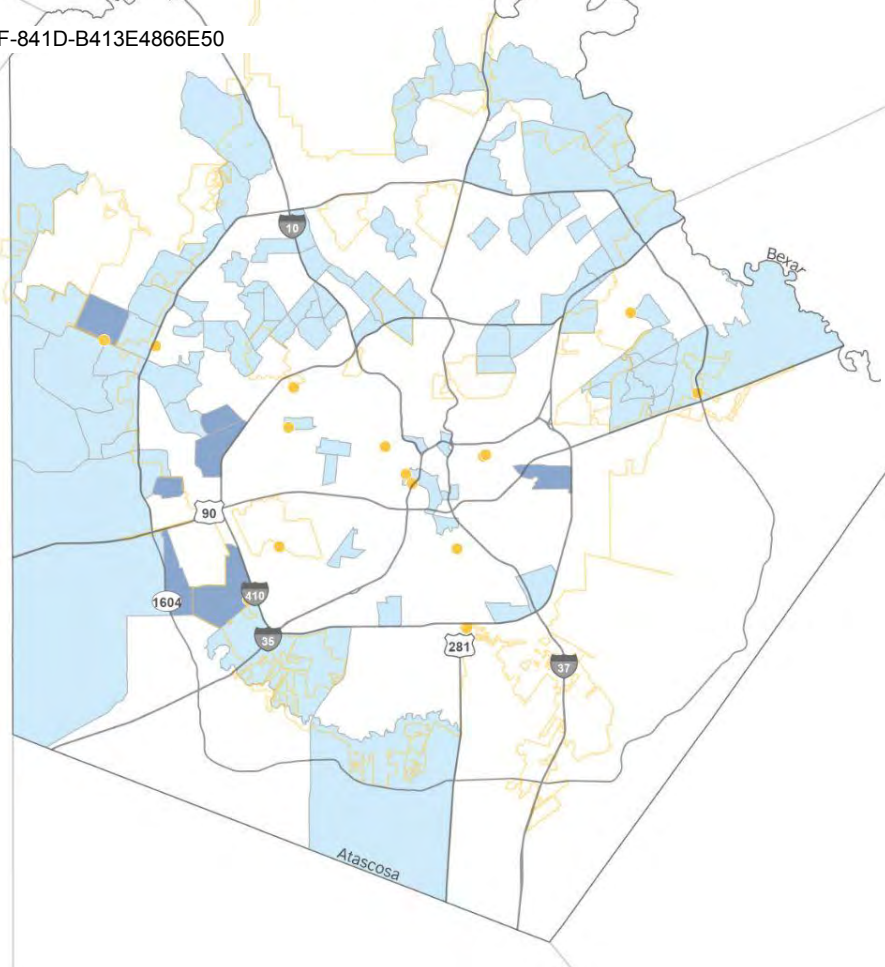
- 1-50 voucher increase
- More than 50 voucher increase

Medina

Comal

Bexar

Wilson
Guadalupe



2

Increasing trends in voucher utilization outside Loop 410

3

Opportunity Home inventory additions since 2017 overlap with some but not all voucher increases

- Beacon
- Partnerships
- Public Housing
- 1-50 voucher increase
- More than 50 voucher increase

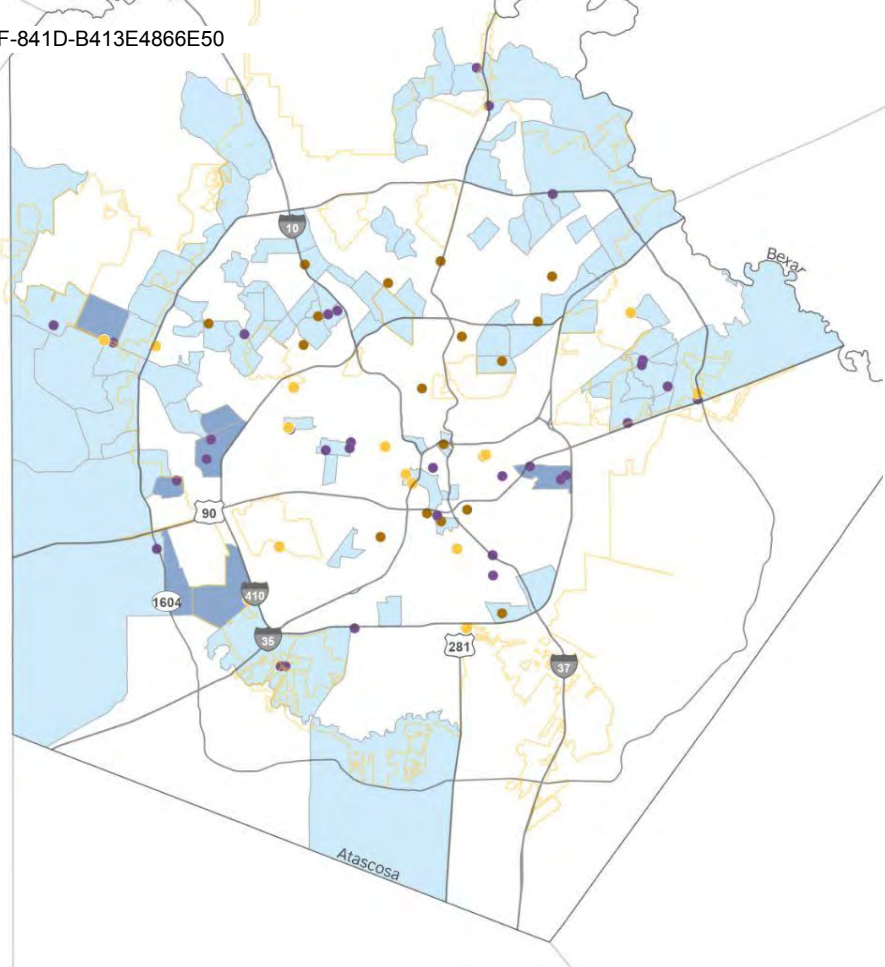
Atascosa

Medina

Comal

Bexar

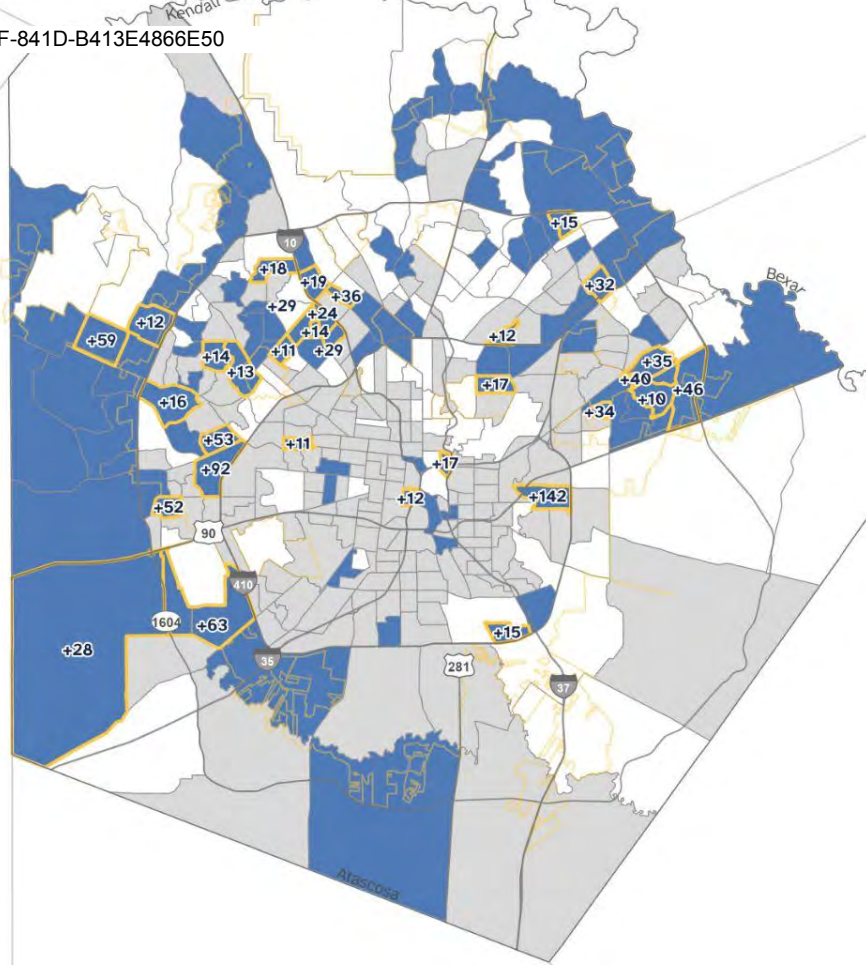
Atascosa



- 2** Increasing trends in voucher utilization outside Loop 410
- 3** Opportunity Home inventory additions since 2017 overlap with some but not all voucher increases
- 4** Additional affordable inventory since 2017 is likely driving some but not all of the areas with increases



Medina

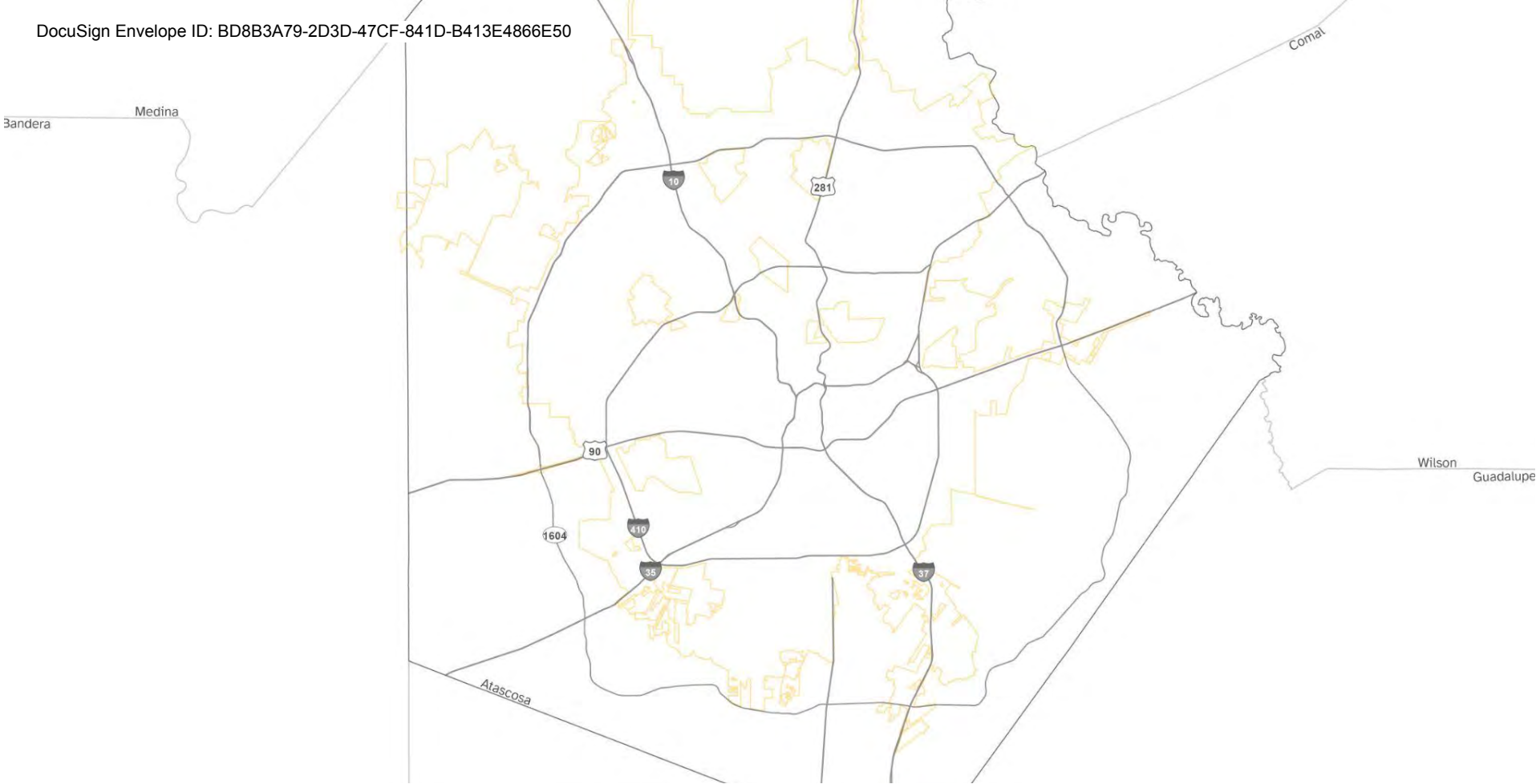


- 1 Decreasing trends in voucher utilization inside Loop 410 and in other pockets outside Loop 410
- 2 Increasing trends in voucher utilization outside Loop 410
- 3 Opportunity Home inventory additions since 2017 overlap with some but not all voucher increases
- 4 Additional affordable inventory since 2017 is likely driving some but not all of the areas with increases
- 5 Most areas with at least a 10 voucher increase are near or outside Loop 410



Voucher Mobility Patterns 2017 to 2023

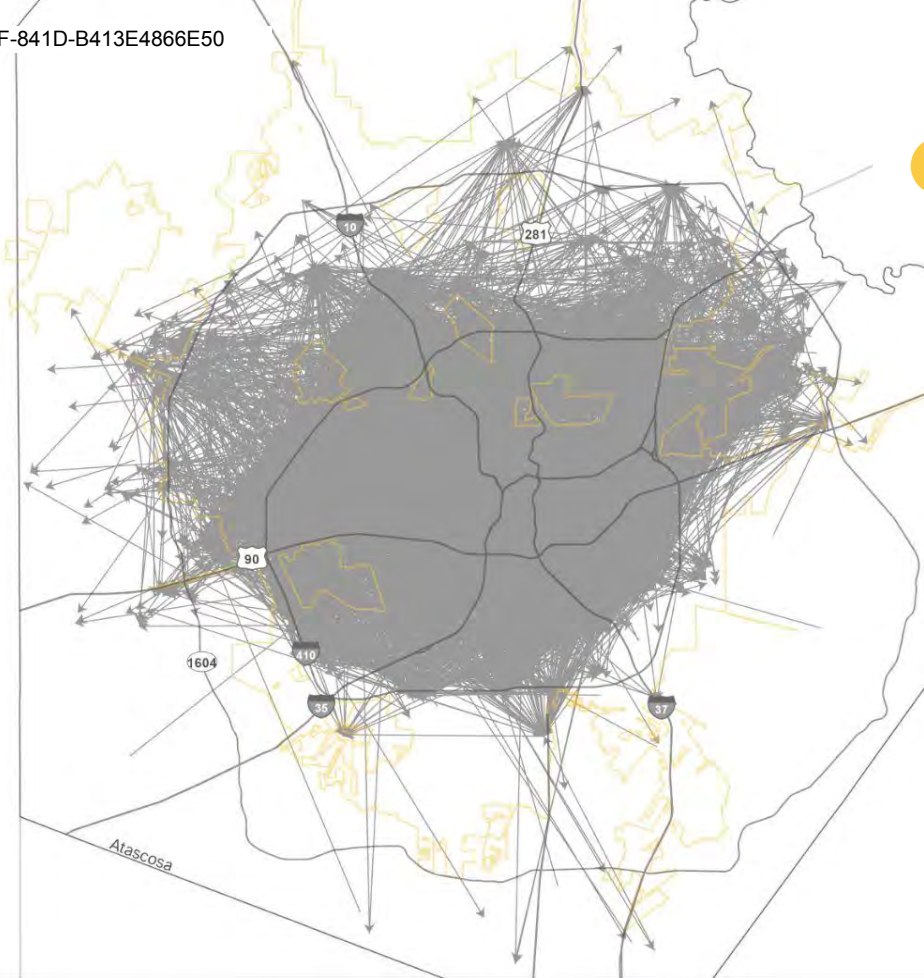
Mobility Patterns



Bandera Medina

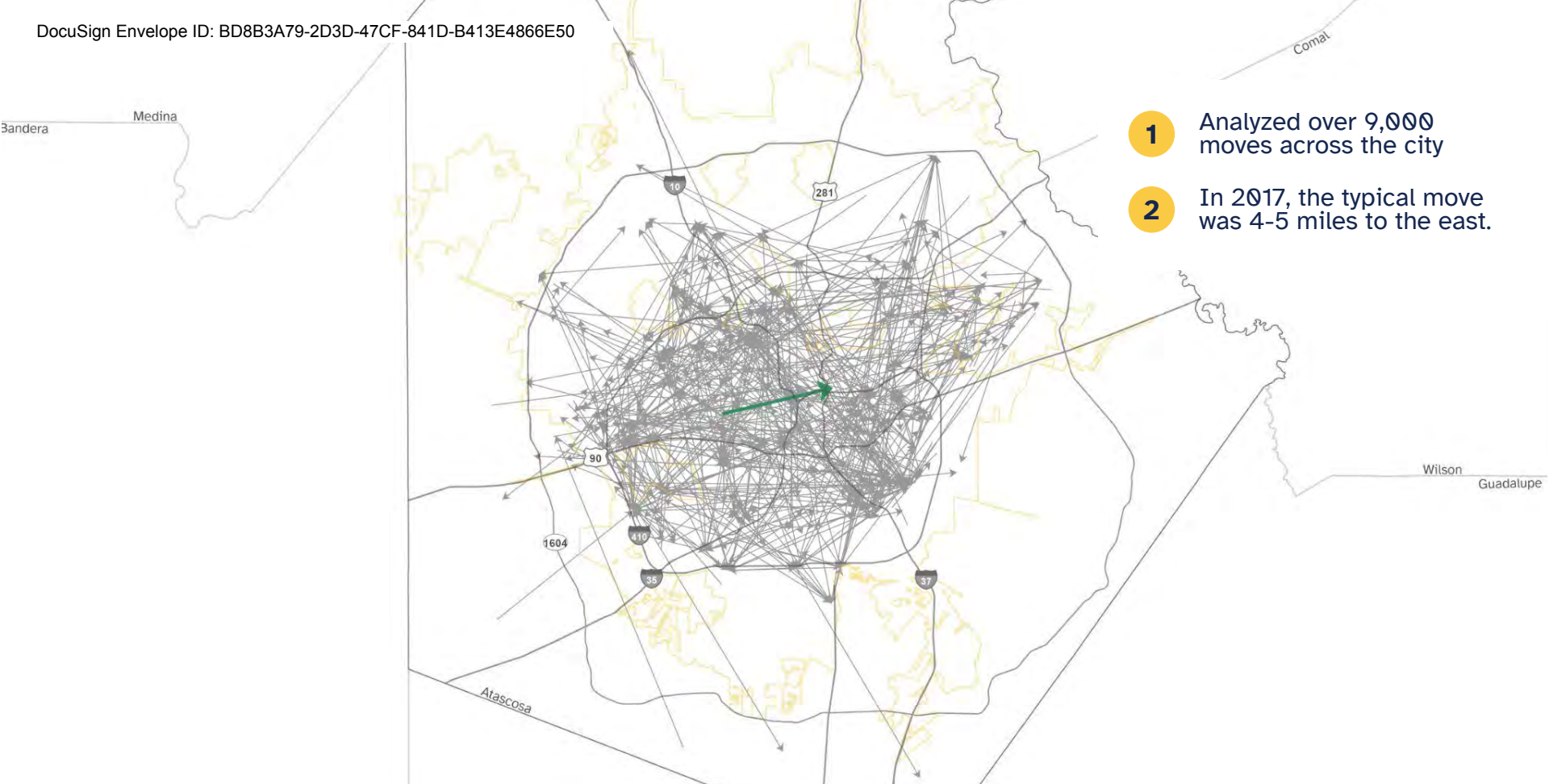
Comal

1 Analyzed over 9,000 moves across the city



Wilson Guadalupe

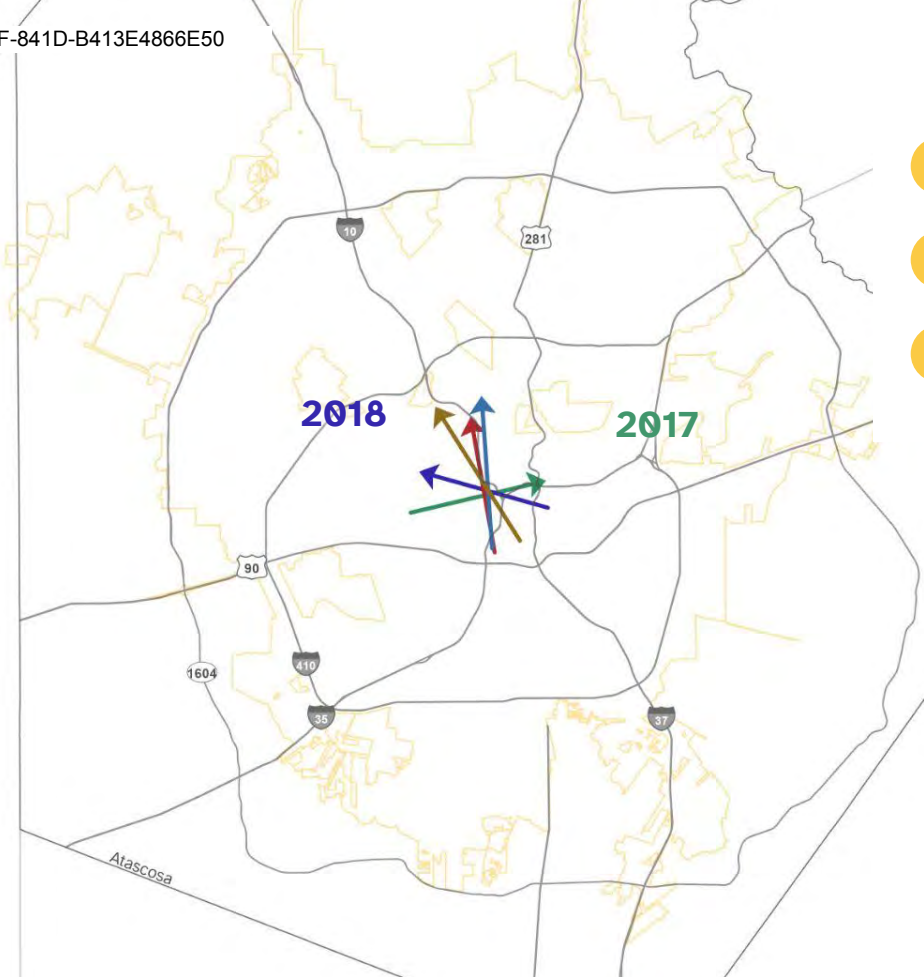
Atascosa



- 1 Analyzed over 9,000 moves across the city
- 2 In 2017, the typical move was 4-5 miles to the east.

Bandera Medina

Comal

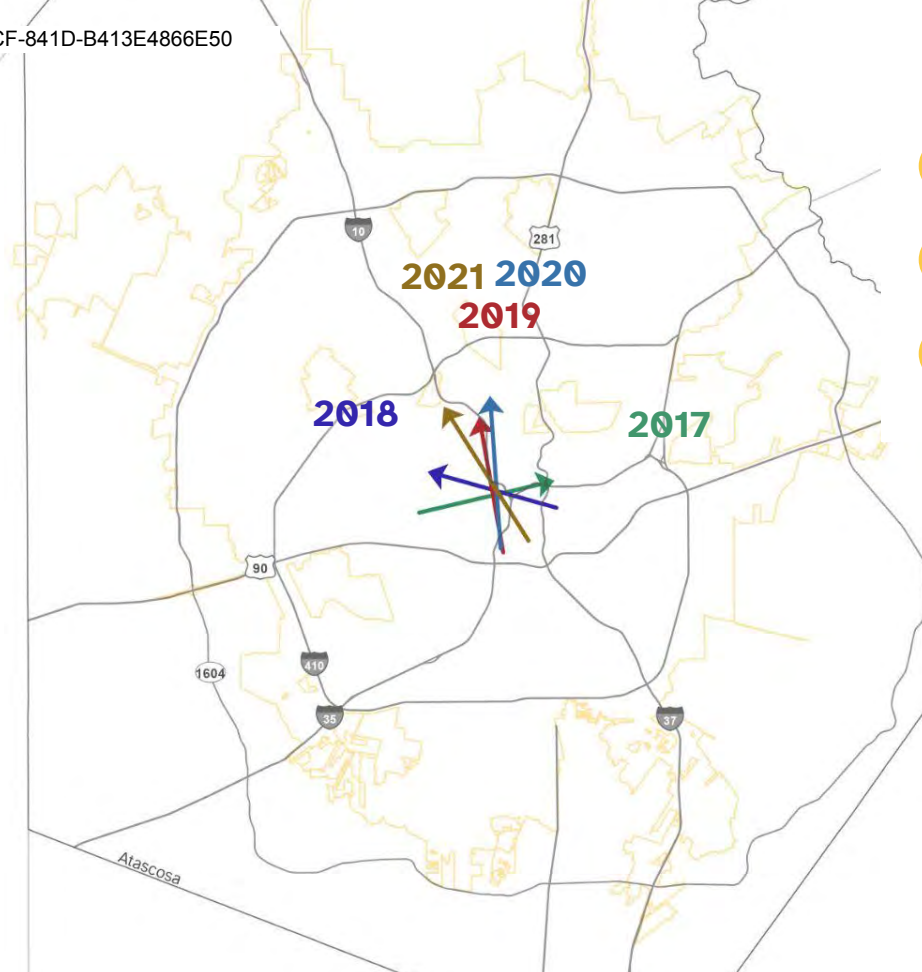


- 1** Analyzed over 9,000 moves across the city
- 2** In 2017, the typical move was 4-5 miles to the east.
- 3** After 2017, the typical move changed directions to the west and then north.

Wilson Guadalupe

Atascosa

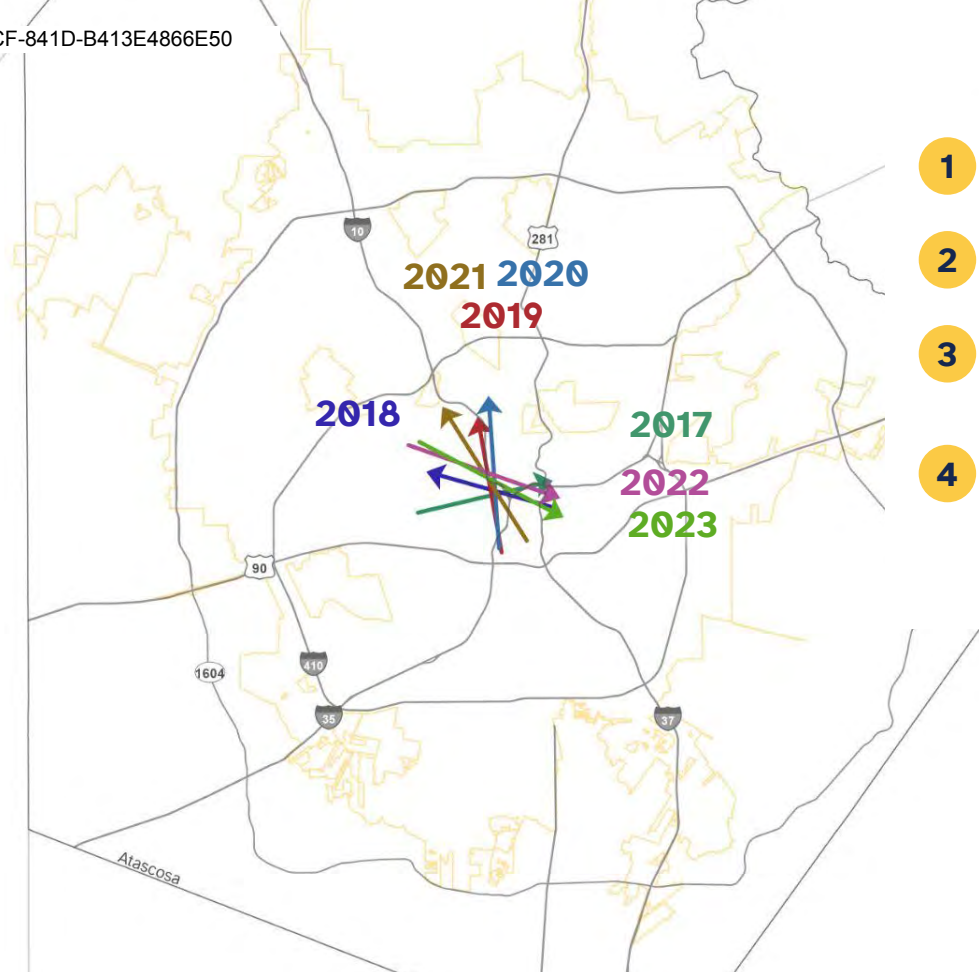
Bandera Medina



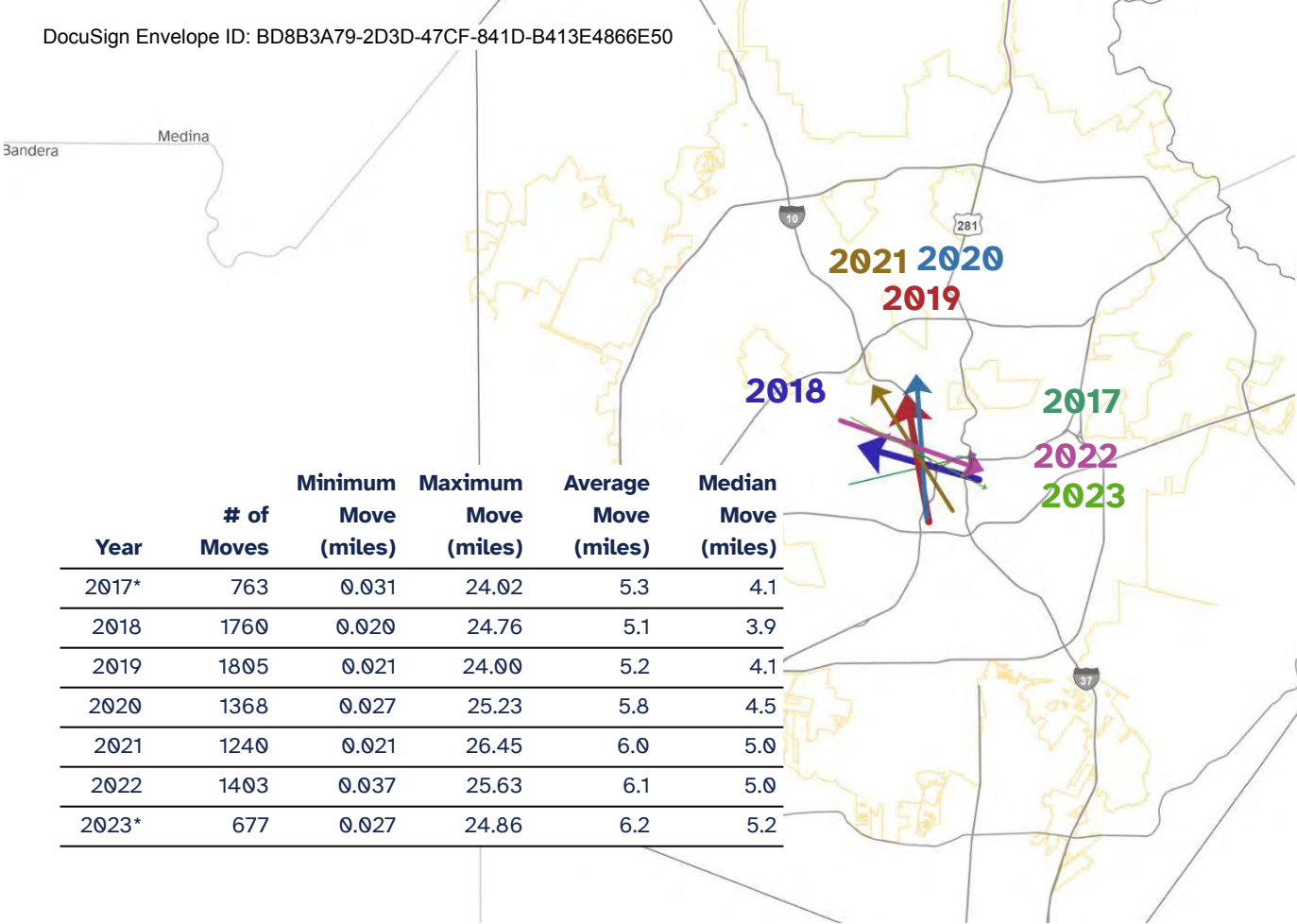
- 1 Analyzed over 9,000 moves across the city
- 2 In 2017, the typical move was 4-5 miles to the east.
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Wilson Guadalupe

Bandera Medina

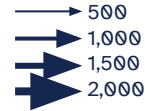


- 1 Analyzed over 9,000 moves across the city
- 2 In 2017, the typical move was 4-5 miles to the east.
- 3 After 2017, the typical move changed directions to the west and then north.
- 4 In the last two years, the typical move has been towards the southeast, covering a slightly longer distance of 5-6 miles.



Year	# of Moves	Minimum Move (miles)	Maximum Move (miles)	Average Move (miles)	Median Move (miles)
2017*	763	0.031	24.02	5.3	4.1
2018	1760	0.020	24.76	5.1	3.9
2019	1805	0.021	24.00	5.2	4.1
2020	1368	0.027	25.23	5.8	4.5
2021	1240	0.021	26.45	6.0	5.0
2022	1403	0.037	25.63	6.1	5.0
2023*	677	0.027	24.86	6.2	5.2

- 1 Analyzed over 9,000 moves across the city
- 2 In 2017, the typical move was 4-5 miles to the east.
- 3 After 2017, the typical move changed directions to the west and then north.
- 4 In the last two years, the typical move has been towards the southeast, covering a slightly longer distance of 5-6 miles.
- 5 There were more moves in 2018 and 2019.



Looking Ahead

- Continue learning and exploring other observations and analyses that can inform how we can improve our services and programs
- Enable Opportunity Home to have conversations with other organizations or institutions about systems level challenges and opportunities

Questions?

From Awareness to Action

Navigating the Path to Equity, Diversity, and Inclusion



Dr. Jeneise Briggs

Director of Equity, Diversity, and Inclusion

Terminologies

Housing Justice is both the process and outcome of creating a housing system where housing is recognized as a fundamental human right and a public good, ensuring that everyone has access to affordable and dignified housing.

Source: Grounds Works consulting and the Leading with Equity workgroup

Equity means delivering our services in a way that results in **fair and equal outcomes**. Equity ensures that systems, including policies, programs and rules, do not create unfair results.

Policy and Planning

- Equity, Diversity, and Inclusion (EDI) Framework
- Equity Scorecard and Strategy Map
- Equity and Theory of Change
- Equity Leadership Workshops / Presentations
- Equity Policy / Process Reviews
- Inclusive Community Engagement Guide

Racial Equity

Ensuring that all people experience well-being in a just society, regardless of their racial or ethnic identity



Individual Level

An individual's identity is not predictive of their day-to-day experiences and life outcomes



Organizational level

An employee's identity is not predictive of their ability to join, be developed, belong, succeed, progress, and be respected in the workplace



Community Level

The community's culture, systems and structures facilitate the thriving of individuals from all identity groups

Opportunity Home

EDI Domains/Framework

Change the Narrative



Cultural (group identities)

Reduce stereotypes
and increase cultural
competence

Change your Mind



Individual (beliefs, biases
and behaviors)

Change the Rules



Institutional (rules and
structures)

Reform inequitable systems
by changing the rules

Outcome

Equity: Residents' race does not determine any housing assistance or support service outcomes

% of **residents** say that Opportunity Home advances equity

% of **employees** say that Opportunity Home advances equity

% of **community** say that Opportunity Home advances equity

T1 Strategy

Residents are aware of and understand equity and how it impacts them

Residents live in units that are designed for accessibility and aging in place

Organizational culture reflects and advances Equity

Policies, processes, and performance evaluations are equitable

Equity leader locally

Equity leader nationally

Residents live in neighborhoods that benefit from equitable investment across systems

Department

EDI Department
Page 194 of 240

Early Successes + Policy Changes Underway

Early Successes and Policy Changes Underway

Policy on "**over-housing**" in relation to changes in family composition

MTW Equity Analysis — Equity Impact Analysis Framework

Digital Equity | ConnectHomeSA

Criminal history background **screening policies**

Implementing new **payment standards** for residents before their biennial / triennial recertification appointments

Tenant **fee structure** for Public Housing and Beacon Properties

Embedding equity in the HCV waitlist

JEDI Workgroup



DIVERSITY
of people
perspective



EQUITY
in policy, practice
& Position



INCLUSION
via power, voice &
organizational culture



JUSTICE
with equal rights &
equitable
opportunities

JEDI Workgroup Cross Functional Action Team

- Employee Handbook (Largest policy document)
- JEDI Cafe (Intranet)
- Inclusive Language Guide
- Equity, Diversity, and Inclusion Communications Plan
- Celebratory Calendar of Events
- Business Plans for Proposed Equity Goals

JEDI Workgroup Cross Functional Action Team

- New Hire Orientation (Values Orientation)
- Racial Equity Institute Trainings
- Affordable Housing Challenges for People of Color in San Antonio
- JEDI Equity Workshop (Upcoming)
- EDI Marketing Materials (Upcoming)

Key Takeaways

Equity Leadership Workshops/Presentations

Fall Equity Retreat FY2022

- **Focus on Educating and Building Awareness** — establish “Equity Mentors” to support current employees and review the hiring process to prioritize diversity.
- **Individuation** — evaluate individuals based on their personal characteristics rather than group affiliations. **Revise the HR process to implement a blind approach.**

Key Takeaways

Equity Leadership Workshops/Presentations

Fall Equity Retreat FY2022

- **Develop a balanced scorecard and make it highly visible** — the scorecard should include measurable behavioral changes, such as employee satisfaction surveys and exit interviews, as well as measurable representation changes like attrition, succession, etc.
- **Action Recommendation** — implement stay interviews in addition to, or instead of, exit interviews. Address issues proactively instead of waiting for someone to leave.

Key Takeaways

Equity Leadership Workshops/Presentations

Advancing Equity in the Housing Sector | DreamWeek 2023 Panel Discussion
Exchanging Ideas. Inspiring Discussion. Igniting Change.

- Paco Gonzaba from Gonzaba Medical Group, Misty Harty from YWCA San Antonio, La Juana Chambers Lawson from Tacit Growth Strategies and Dr. Jeneise Briggs and Kristen Carreon from Opportunity Home.
- **Goal: Establish a Local Equity Alliance**

Key Takeaways

Equity Leadership Workshops/Presentations

Operationalizing Racial Equity Leadership to Support Diverse Teams

- Building equity knowledge and skills is a good place to start, but don't wait until staff reach an “expert” level to begin using equity tools.
- Racial equity core team members represent diversity in race/ethnicity, gender identity, teams and positionality / functions within the organization.

Key Takeaways

Equity Leadership Workshops/Presentations

Operationalizing Racial Equity Leadership to Support Diverse Teams

- Medium-to-long-term investment in, and commitment from, team members is crucial for sustaining equity leadership.
- Regularly collecting, analyzing and reporting disaggregated data is essential for operationalizing equity.
- **Action: Implement changes to our driver's license requirements on job applications — an idea that originated with the JEDI team.**

Partnerships

City of San Antonio
**Budget Equity
Tool Workshop**

**Advancing Equity in
the Housing Sector**
A DreamWeek and
Opportunity Home
Discussion

**CLPHA Housing
Is Summit**
Co-presented with the
YWCA of San Antonio

**Local Equity
Alliance**

**YWCA San Antonio
Business Cohort**



City of San Antonio | Budget Equity Tool Workshop





Circles of Change for Continual Learning (CCCL)

- Microaggression and Its Psychological Impact in the Workplace
- The Genealogy of Housing in San Antonio (How Did We Get Here? Unpacking the History of Housing in San Antonio)
- Ageism in the Workplace
- Neurodiversity
- Inclusive Leadership
- The Intersectionality of Bias and Decision-Making
- Navigating Difficult Conversations
- Compassion Fatigue and Burnout
- Ongoing Racial Equity Trainings (REI)

Our EDI journey is not a sprint

Short Term

Change in access, support, knowledge, skills, attitudes, interest, commitment, and developed policies and/or execution of agreements

Medium Term

Changes in behavior, adoption of policies, decision-making and system change

Long Term

Change in conditions — social, economic, civil and environmental

(i.e., residents live in neighborhoods that benefit from equitable investments)

**“Start where you are.
Use what you have.
Do what you can.”**

—Arthur Ashe



Questions?

Dr. Jeneise Briggs, *Director of EDI*
jeneise_briggs@homesa.org | 210.557.4341

Customer Service Update

October 18, 2023

Agenda

01 Current Situation

**02 Challenges
and Solutions**

03 The Future

04 ROI and Costs

**05 Opportunity
Call Statistics**

**06 Technology
Equity**

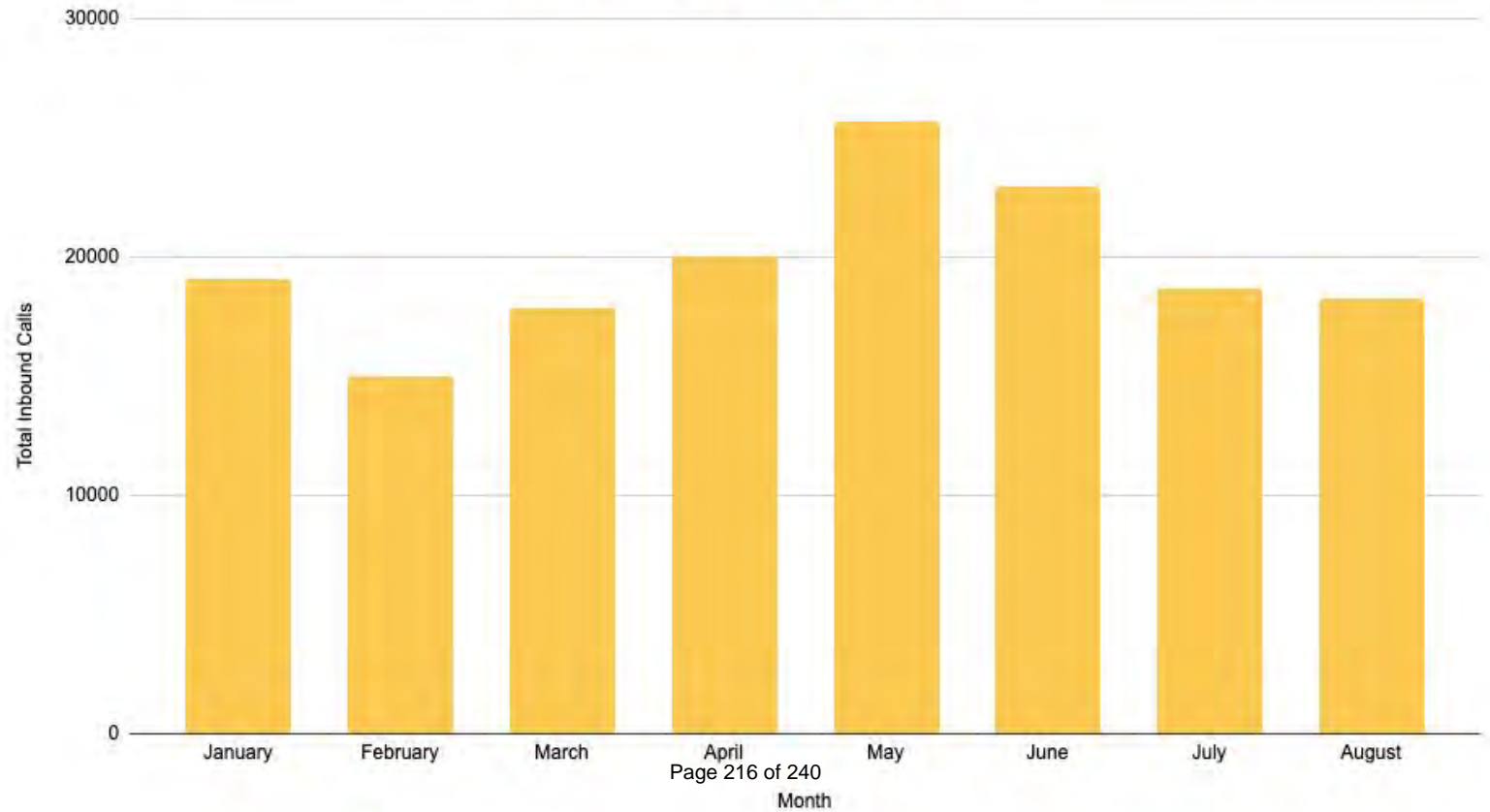


Call Volume

- Call volume to our main phone line (210.477.6000) has significantly increased since the onset of COVID-19 operations.
- There are 2-3 CSRs dedicated to taking calls, which is an increase from our previous staffing levels. The rest of the team supports in-person lobby visits and other inquiries.
- On average, we are able to answer approximately 2,500 calls per month. We track this manually using a Google Form.

	March	April	May	June	July	August		
Total Inbound Calls	19102	15023	17847	20048	25685	22984	18647	18280

Total Inbound Calls per Month



Operations Improvements

Client Services Team

Although positions have been added to support phones and the lobby, we are continuing to work on staffing all positions.

Other Solutions

Finalizing an RFP to solicit the implementation of a Resident Portal with a mobile app to allow 24/7 access to information. Additionally, finalizing an RFP to redesign the lobby to improve customer experience.

Assisted Housing Programs

The majority of calls answered pertain to Assisted Housing Programs.

The department contracted two vendors to assist with processing the backlog of recertification files.

The department has been working to produce videos that answer residents' frequently asked questions, including those on Housing Quality Standards (HQS), the Request for Tenancy Approval (RTA) process, and How to Search with a Voucher.

Business Challenges

- Less than desirable customer service experience
- Huge attrition and CSR turnover
- Call volumes have increased to an overwhelming level
- Lack of automated tracking mechanism for support provided
- Limited automation to handle simple inquiries
- No digital engagement options to drive efficiencies

RingCentral Concerns

Although data on the calls received comes from RingCentral, the data on the calls answered is **collected manually**.

- CSRs log each call through a Google Form, specifying the call reason.

Calls are counted multiple times **based on the number of prompts** selected or transfers.

- Limited business insights into call volume statistics

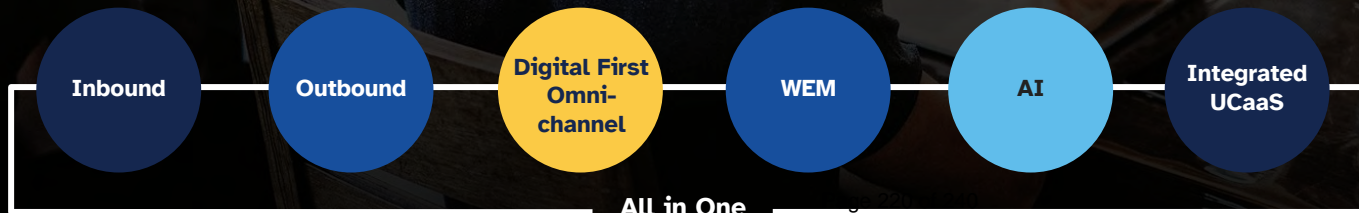
Calls stay in the **queue for 15 minutes** before being prompted to leave a voicemail.

Call Center Transformation

Customer Engagement + Reshaping our Customer Service Model

RingCentral Collaborative Contact Center

Effortless Customer + Agent Experience



Ring Central UCaaS and CCaaS

UCaaS

Unified Collaboration as a Service

- Voice / Telephone
- IM/SMS Messaging
- VM, Single Layer Queue Menu
- Collaboration
- Single-Use Interface
- Remote and On-Premise Access from Laptops

Collaborative Contact Center

CCaaS

Call Center as a Service

- Routing
- Queuing
- Recording
- Self-Service Options
- IVR
- Digital Channels
- CRM Integration
- Call Hold Management
- Analytics / Reporting and Dashboarding
- AI

PHASE 1

Implement RingCentral Contact Center

- Improve business insights with real-time dashboards and historical reporting
- Leverage disposition codes and tags to understand and track why people are reaching out
- Offer callbacks in queue to help manage spikes in call traffic and reduce the volume of voicemails
- Leverage voicemail interactions for after-hours routing to agents in the morning
- Eliminate duplicate phone calls
- After-Service Customer Survey

PHASE 2

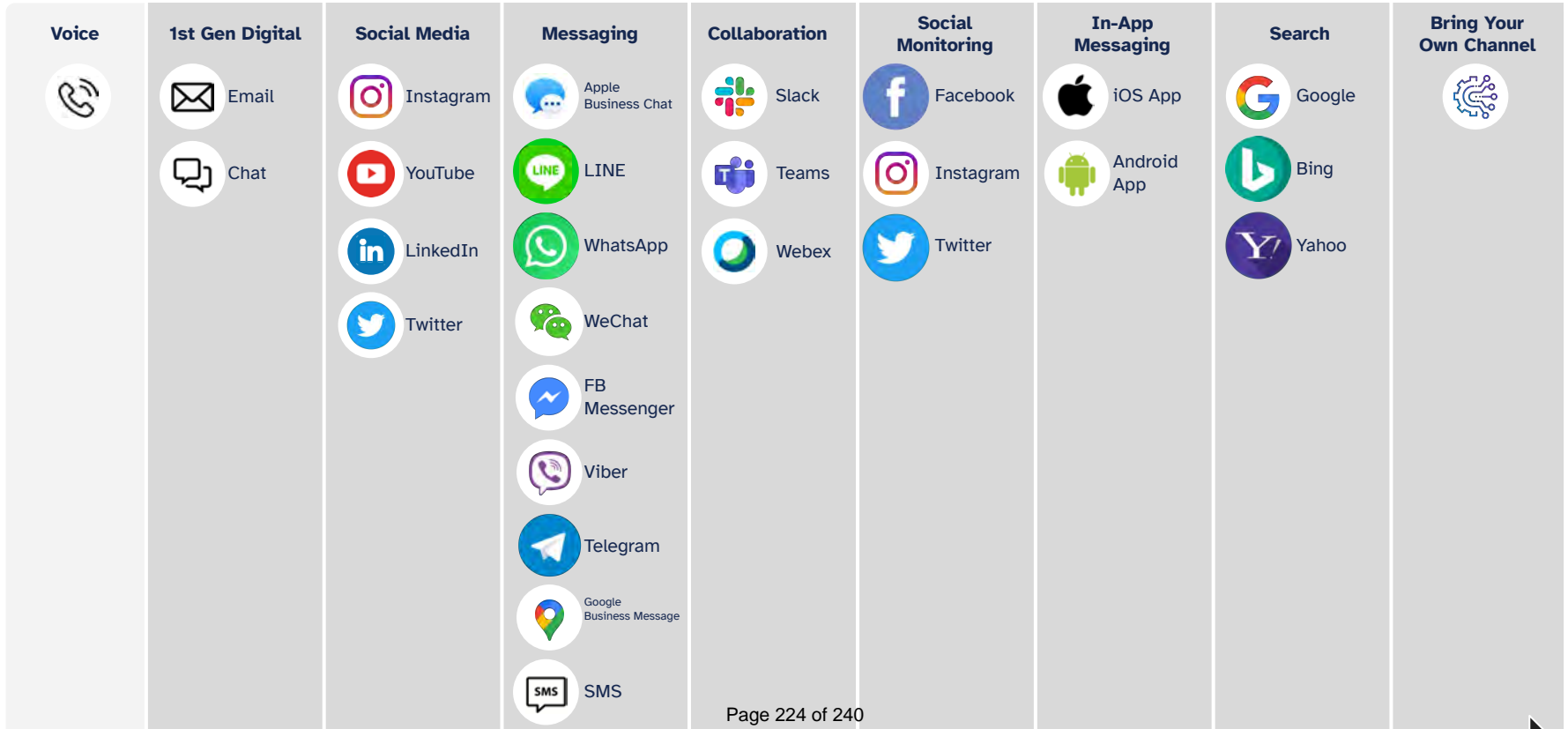
Expand Accessibility Through Digital Channels

- Deflect, distribute and diversify message inquiries
- Implement two-way SMS as ways to communicate with front-line team members
- Open up WhatsApp as two-way messaging channel for residents who may not have unlimited SMS plans on their mobile devices
- Introduce Interactive Voice Response (IVR) to leverage voice activation for quick replies and streamline digital responses
- Using digital channels to provide quick links to resources necessary to assist with customer inquiries

Omnichannel Capabilities

Legacy

Transformational



Multiple channels for digital first self-service



PHASE 3

Identify Opportunities for Self-Service Automation

- Implement Interaction Analytics to identify trends and identify areas of frustration
- Enhance digital engagement via SMS and WhatsApp with bots to contain low-value inquires before reaching an agent
- Leverage self-service IVR to divert live agent calls and provide 24/7 access to information
- Build an Elite (CMS) interface to leverage IVR technology

PHASE 4

Introduce AI Into Your Customer Experience

- Leverage conversational AI across the IVR and digital channels
- Improve containment rates with multi-language AI support
- Introduce real-time interaction guidance for improved agent performance and engagement outcomes
- Reduce employee turnover with the implementation of smart bots to create Opportunity Home Large Language Model (LLM) databases
- Use scripts and the LLM data to ease the call burden
- Residents can utilize LLM common inquiries

Challenges

Less than desirable customer service experience, with call volumes reaching an overwhelming level, resulting in thousands of voicemails a week

Huge attrition and CSR turnover, limited automation to offload low-value inquires, and a lack of digital engagement options to drive efficiencies

Limited business insights into call volume statistics and no automated tracking mechanism for support provided

Solutions

Multi-Language Self-Service IVR, Callback in Queue, Voicemail Routing, Web Callback and Workforce Optimization

Omnichannel smart routing (Voice + 30 Digital Channels) to divert and distribute resident inquiries

Real-time dashboards, disposition codes and tags, standard and custom historical reporting and elimination of duplicate calls

The Future is Near

RingCentral Phased Adoption Plan

Phase 1
**Implement RingCentral
Contact Center**

Jan. - June 2024

Phase 2
**Expand Accessibility
Through Digital
Channels**

June - Dec. 2024

Phase 3
**Identify
Opportunities
for Self-Service
Automation**

Dec. 2024 - May 2025

Phase 4
**Introduce AI Into
Your Customer
Experience**

May - July 2025

Opportunity Home Statistics

Total Inbound Calls from Aug. 27 to Sept. 27: 15,542

Average Calls Per Day: 501.35

Average Number of Agents Answering Calls Daily: 2.33

Average Handle Time: 4 minutes and 52 seconds

Average Percentage of Calls Answered: 15.53% (2,414 calls)

Voicemails and Disconnected: 84.47% (approximately 13,128 voicemails last month)

Average number of full-time agents needed to answer **15,542 calls within 15 minutes or less:**

15.7

—*Call Center Helper.com*

Estimated Costs Phase I

Component	Cost (Recurring)	Professional Services	One-time Cost (Non-recurring)
Core Licensing			
Essential Package	\$1,275.00		
RingCentral Office			
Agent Leg Connectivity	\$126		
MVP Standard License (Included)	\$427.35	Post Call Survey Implementation	\$6,000
Enterprise Support		Contact Center Core Build	\$23,420
Contact Center Bronze	\$850		
Total Monthly Cost	\$2,251.00	Contact Center Core Build	\$29,420

Digital Engagement ROI

Contact Channel Mix	Volume	Percentage	Cost per Channel	Extended Cost	Monthly Savings	Annual Savings	Year 1 Costs	Payback Month
Voice	15,542	100%	\$6.66	\$103,509.72				
Digital SMS	0	0%	\$2.23					
Total Cost				\$103,509.72	\$0	\$0	\$50,432	n/a

Contact Channel Mix	Volume	Percentage	Cost per Channel	Extended Cost	Monthly Savings	Annual Savings	Year 1 Costs	Payback Month
Voice	12,433	80%	\$6.66	\$82,803.78				
Digital SMS	3,109	20%	\$2.23	\$69,33.07				
Total Cost				\$89,736.85	\$13,772.87	\$165,274.44	\$50,432	3.6

More Industry Statistics to Consider

Average Cost per Contact Benchmark Portal

Inbound Voice: \$6.66
Outbound Voice: \$4.93
Email: \$8.60
Chat: \$2.79
SMS: \$2.23
Social: \$2.42

Live interactions can cost companies **24-48 times** that of self-service.

—*Frost & Sullivan*

65% of customers prefer self-service for simple inquiries.

—*Salesforce*

Companies delivering a strong omnichannel customer experience typically have retention rates of **89%**.

—*Nice*

Technology Equity

- Resident Diversity and Inclusion
 - Education
 - Ability
 - Language
- Digital Equity
 - Literacy
 - Devices
 - Connectivity
- Hybrid Solutions to Serve All Residents
- Immersive and Comprehensive Communications

Questions?

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023****MEMORANDUM**

TO: Board of Commissioners

FROM: Ed Hinojosa Jr., President, and CEO

PRESENTED BY: George M. Ayala, Director of Procurement

RE: Procurement Activity Report

CURRENT SOLICITATIONS:

There are currently two Invitation for Bids (IFB), two Request for Proposals (RFP), and one Quick Quote that are being advertised. The IFB's are for exterior painting for Salinas Medical Clinic and automatic door repair, maintenance, and inspection. The RFPs are for a learning management system and mowing and grounds maintenance for Beacon Communities. The quick quote is for resurfacing services.

CLOSED/PENDING SOLICITATIONS:

There are nine solicitations that have closed and are currently being evaluated. The solicitations are for foundation stabilization for Alazan/Apache, Cassiano, and Park Square; deferred compensation 457b plan; commercial real estate services; Federal Housing Programs trainer; towing services; home energy rater for Alazan Courts Expansion; Victoria Plaza roof replacement; pest control for Beacon Communities; and repair stair treads for Westway Apartments.

SOLICITATIONS IN DEVELOPMENT:

Procurement is currently working on several solicitations for advertisement. These include: fair market rent survey; consulting services for rental market study; office cleaning services; property management software for Beacon Communities; property management services for Beacon Communities; grant writer; Alazan Expansion development; parcel lockers; interior/exterior signage for Snowden Apartments; development initiative consulting services; commercial property management; temporary and contract personnel services; intrusion protection and security cameras for properties; irrigation services; inspection, evaluation, repair, and/or stabilization of foundations; urgent care, physicals, alcohol and drug testing; translation services; cabinets; debt collection services; rent comparability study; and resident portal with mobile application.

CHANGE ORDERS: 3rd Qtr 2023

Date	Contract	Contractor	Description
08/24/2023	Bulk Pick Up Services	Bulk-Away	10% increase to the contracted rates
08/30/2023	Swimming Pool Water Quality Maintenance Equipment	Poolsure	3% increase to the contracted rates
09/20/2023	Exterior Painting at Westway	Geofill Construction	Increase \$13,441.25;

OPPORTUNITY HOME SAN ANTONIO**October 18, 2023**

	Apartments		unforeseen work
--	------------	--	-----------------

VEHICLE PURCHASES: 3 Qtr 2023

Date	Number Purchased	Vehicle Year	Make/Model	Amount	Vendor
07/05/2023	3	2023	Ford, F150	\$131,838.00	Chastang Enterprises Houston LLC dba Chastang Ford

PROPOSED ACTION:

None at this time.

STRATEGIC OUTCOMES:

Supports all strategic outcomes.

ATTACHMENTS:Procurement Activity Report
Business Categories

Procurement Activity Report as of October 2, 2023

Solicitations Currently being Advertised

Opportunity	Home Department	Type	Solicitation Name	Bidders Conference	Closes
Organization Wide		QQ	Resurfacing Services	N/A	10/03/2023
Public Housing		IFB	Exterior Painting for Salinas Medical Clinic	N/A	10/05/2023
Organization Wide		IFB	Automatic Door Repair, Maintenance, and Inspection	N/A	10/13/2023
Innovative Technology		RFP	Learning Management System	10/6/2023	10/16/2023
Beacon Communities		RFP	Mowing and Ground Maintenance for Beacon Communities	N/A	10/16/2023

Board Items

			Date Closed	
Human Resources	N/A	Expenditure of Additional Funds for Temporary and Contract Personnel Services	N/A	October 4, 2023 Operations and Real Estate Committee Meeting and November 1, 2023 Regular Board Meeting
Organization Wide	RFQ	Architectural, Engineering, and Forensic Consulting Services	7/5/2023	

Solicitations Under Evaluation

Opportunity	Home Department	Type	Solicitation Name	Date Closed	
Public Housing		IFB	Foundation Stabilization for Alazan/Apache, Cassiano, and Park Square	04/10/2023	Procurement Negotiations, Due Diligence, and Evaluation
Human Resources		RFP	Deferred Compensation 457(b) Plan	06/06/2023	
Development Services		RFP	Commercial Real Estate Services	07/03/2023	
Assisted Housing Programs		RFP	Federal Housing Programs Trainer	07/20/2023	
Organization Wide		QQ	Towing Services	08/25/2023	
Construction Services and Sustainability		QQ	Home Energy Rater for Alazan Courts Expansion	08/29/2023	
Construction Services and Sustainability		IFB	Victoria Plaza Roof Replacement	09/08/2023	
Beacon Communities		RFP	Pest Control for Beacon Communities	09/21/2023	
Public Housing		IFB	Repair Stair Treads for Westway Apartments	09/29/2023	

Future Solicitations

	Solicitation Name	Anticipated Month of Release
Beacon Communities	Fair Market Rent Survey	Interagency Agreement
	Consulting Services for Rental Market Study	Interagency Agreement
	Office Cleaning Services	October 2023
	Property Management Software for Beacon Communities	GSA
	Property Management Services for Beacon Communities	November 2023

Community Development Initiatives	Grant Writer	October 2023
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Construction Services and Sustainability	Alazan Expansion Development	October 2023
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DSNR	Parcel Lockers	Department Hold
	Interior/Exterior Signage for Snowden Apartments	Department Hold
	Development Initiative Consulting Services	Department Hold

Executive	Commercial Property Management	October 2023
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Human Resources	Temporary and Contract Personnel Services	October 2023
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Innovative Technology	Intrusion Protection and Security Cameras for Properties	November 2023
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Organization Wide	Irrigation Services	October 2023
	Inspection, Evaluation, Repair, and/or Stabilization of Foundations	October 2023
	Urgent Care, Physicals, Alcohol and Drug Testing	October 2023
	Translation Services	October 2023
	Cabinets	November 2023
	Debt Collection Services	November 2023
	Rent Comparability Study	November 2023
	Resident Portal with Mobile Application	November 2023

Categories of Procurements

Opportunity Home Department	Solicitation Name	Vendor	Amount	Date
Awards Under President and CEO Expanded Authority				
No awards under this category during the reporting period				
Awards Under Contracting Officer Authority				
Innovative Technology	Covert Security Cameras for Springview	VIA Technology	\$27,162.50	9/21/2022
IT Purchases (Resolution 6010 authorizing the use of Cooperative Purchasing Contracts and General Services Administration (GSA Federal Supply Schedules))				
No awards under this category during the reporting period				

Project Name	District	Developer	Deal Type	Financing	Est Closing Date	TotalDevCost	Developer Fees	Tax Credit Equity	Tax Abatement	# Units	PH/PBV	Income Mix							
												30%	40%	50%	60%	70%	80%	Market	
Financing Closed (under Construction)																			
100 Labor*	D1	Franklin	Self Developed	HUD 221(d)(4)	Closed	\$52,438,321	\$3,318,932	\$0	\$1,111,692	213		27		17	0	0	169		
Bristol at Somerset	D4	Louis Poppon Development Consulting	Tax Credit	4% Tax Credit & Bonds	Closed	\$63,331,807	\$7,500,000	\$25,552,709	\$1,342,634	348		0	0	0	348	0	0		
Horizon Pointe	D2	Integrated Realty Group	Tax Credit	4% Tax Credits & Bonds	Closed	\$65,639,352	\$7,498,298	\$25,025,832	\$1,391,554	312		20	35	106	0	151	0		
Josephine	D1	Lynd	PFC	Conventional Loan	Closed	\$68,463,888	\$250,000	\$0	\$1,451,434	259		0	0	26		104	129		
Palo Alto	D4	Streamline	Tax Credit	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	PFC	Conventional Loan	Closed	\$67,914,812	\$250,000	\$0	\$1,439,794	360		0	0	36		144	180		
Snowden Road*	D7	Opportunity Home	Self Developed/Tax Credit	9% Tax Credits	Closed	\$34,700,554	\$2,599,000	\$13,948,605	\$735,652	135	54	68		26	41				
Vista at Silver Oaks		Atlantic Pacific Comm.	Tax Credit	9% Tax Credits	Closed	\$28,147,350	\$2,361,340	\$17,998,200	\$596,724	76	0	8	0	23	45	0	0		
Fiesta Trails	D8	NRP	Tax Credit	9% Tax Credits	Closed	\$20,872,241	\$1,700,000	\$13,386,161	\$442,492	60		6		24	30				
Total						\$469,356,382	\$33,039,615	\$120,099,918	\$9,950,355	2099	54	0	145	51	228	770	179	248	478
Board Has Approved																			
Board Provided Final Approval																			
The Sorento # (resyndication of tax credits)	D7	Fairfield Residential	Tax Credit	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		
Bethel Place # (resyndication of tax credits)	D6	Fairfield Residential	Tax Credit	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		
Rosemont at University Park (resyndication of tax credits)	D4	Roers Companies	Tax Credit	4% Tax Credits & Bonds	acquisition closing estimated 7/31/22	TBD	TBD	TBD	TBD	240	0	36	0	0	204	0	0		
Costa Almadena (resyndication of tax credits)	D3	DEVCO	Tax Credit	4% Tax Credits & Bonds	acquisition closed (tax credits pending)	TBD	TBD	TBD	TBD	176	0	27	0	0	149	0	0		
Tigoni Villas (resyndication of tax credits)	D7	DEVCO	Tax Credit	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		
The Ravello (purchase of limited partnership interest)	D3	Opportunity Home will own 100% of partnership	Tax Credit	N/A	2/14/23	N/A	N/A	N/A	TBD	252	0	0	0	0	252	0	0		
San Juan II (purchase of limited partnership interest)	D5	Opportunity Home will own 100% of partnership	Tax Credit	N/A	5/25/22	N/A	N/A	N/A	TBD	144	48	15	0	0	123	0	0		
Viento Apartments	D4	NRP	Tax Credit	4% Tax Credits & Bonds	Pending	\$82,000,000	N/A Issuance of bonds only	N/A	N/A	324	0	49		161	114				
Total						\$165,873,812	\$3,346,083	\$48,261,962	\$3,516,525	1774	48	225	12	183	1348	0	0	6	
Board Approved Bond Inducement																			
Springview*	D2	TBD	TBD	TBD	Pending	TBD	TBD	TBD	TBD	TBD	0	0	0	0	0	0	0		
Fields at Somerset	D4	Cohen Esrey	Tax Credit	4% Tax Credits & Bonds	Pending	\$92,679,102	TBD	TBD	TBD	350	0			350					
Victoria Commons - North Pond*	D1	Catellus	Tax Credit	4% Tax Credits & Bonds	Pending	\$41,550,846	TBD	TBD	TBD	110		12		0	98	0	0		
Total						\$134,229,948	0	0	0	460	0	12	0	0	448	0	0		
Board Approved the Developer																			
Victoria Commons - South Pond*	D1	Catellus	TBD	TBD	Pending	TBD	TBD	TBD	TBD	TBD		TBD		TBD	TBD		TBD		
Victoria Commons - Townhomes*	D1	Catellus	Private Market	TBD	Pending	TBD	TBD	TBD	TBD	TBD		TBD		TBD	TBD		TBD		
Alazan Expansion	D5	Self Development	Self Development	MTW/CoSA Bonds	Pending	\$28,116,444	TBD	N/A	N/A	88	88	88							
Vista at Reed	D6	Atlantic Pacific Comm.	Tax Credit	9% Tax Credits	Pending Board Consideration	\$22,000,428	\$2,420,130	\$17,998,200	\$466,409	70		2	5	19	44				
Total						\$50,116,872	\$2,420,130	\$17,998,200	\$466,409	158	88	2	93	0	19	44	0	0	
Pending Board Consideration																			
Alazan Courts*	D5	TBD	Self Development	TBD	Pending Board Consideration	TBD	TBD	TBD	TBD	0	0	0	0	0	0	0	0		
Total						\$0	\$0	\$0	\$0	0	0	0	0	0	0	0	0		
Grand Total						\$819,577,014	\$38,805,828	\$186,360,080	\$13,933,289	4,491	190	2	475	63	430	2,610	179	248	484

*Opportunity Home owned land
 ^ Historical Tax Credits
 # Total development cost = acquisition price plus rehab soft and hard costs