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

OPPORTUNITY HOME SAN ANTONIO
A COMMUNITY OF POSSIBILITIES

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

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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) East Meadows (FY17) Wheatley Senior Park Senior Living (FY18) Woodhill (FY20) Rosemont at Highland Park (FY20)	0	31 8 36 10 20	31 8 36 10 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 - EO: $609 Group 2: $608 Group 2 - EO: $591 Group 3: $614 Group 4: $620 Group 5: $690 Group 6: $603 Group 7: $707 Group 8: $847 Group 9: $755 Group 10: $876	Group 1: $601 Group 1 - EO: $609 Group 2: $608 Group 2 - EO: $591 Group 3: $614 Group 4: $620 Group 5: $690 Group 6: $603 Group 7: $707 Group 8: $847 Group 9: $755 Group 10: $876	Group 1: $587 Group 1 - EO: $564 Group 2: $620 Group 2 - EO: $687 Group 3: $696 Group 3 - EO: $638 Group 4: $696 Group 5: $815 Group 6: $777 Group 7: $919 Group 8: $887 Group 9: $1,050 Group 10: $1,500	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

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

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 PH: $221,778 Total: $701,298 Savings:	HCV: $152,264 PH: $73,926 Total: $226,190 Savings: $475,108	HCV: $81,998 PH: $71,928 Total: $153,926 Savings: $547,372	Benchmark met

CE #3 | Decrease in Error Rate of Task Execution

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

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?

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 homelessness[1]. 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?

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.

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

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

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

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 FY15: 5 FY16-FY22: 0	FY13-14: 80 FY15-22: 200	0	80	101	207	196	120	82	25	7	5

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 FY21: $536 FY22: $1,488	FY20: $281 FY21: $130 FY22: $361	$878.3	$406.41	$1,127.46

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 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

OPPORTUNITY™ HOME SAN ANTONIO

A COMMUNITY OF POSSIBILITIES