Annual **MTW REPORT**

Fiscal Year 2024-2025
July 1, 2024 to June 30, 2025

Formerly San Antonio Housing Authority

Submitted to HUD for acceptance: September 30, 2025
Accepted by HUD: August 27, 2026

OPPORTUNITY™ HOME SAN ANTONIO

A COMMUNITY OF POSSIBILITIES

MESSAGE FROM PRESIDENT AND CEO

At Opportunity Home San Antonio, we are entrusted with serving more than 65,500 families and individuals who rely on us for safe, affordable housing. Each household represents a story — of resilience, of working toward stability, and of striving for a better future. Our mission is to support those journeys with dignity, compassion and commitment.

Our Moving to Work (MTW) designation gives us the flexibility to fulfill that mission more effectively. It allows us to go beyond traditional housing assistance by combining stable homes with programs that strengthen families and communities. Over the past year, MTW funds enabled our Community Development Initiatives (CDI) Department to reach more than 4,000 residents with resources in education, employment, health and digital and financial literacy training to help achieve self-sufficiency goals. This included expanding resident leadership, providing access to food, increasing digital access, and enhancing programs like Family Self-Sufficiency (FSS) that help families build savings and move toward independence.

That same flexibility advanced critical housing priorities across San Antonio. We completed two major developments — Snowden Living, offering quality homes for seniors, and 100 Labor Downtown Apartments, a mixed-income community in a high-opportunity area. We also supported pre-development at Lincoln Heights and Alazan Courts, made important repairs at Midcrowne and The Ravello, and acquired properties such as Elan Gardens, The Alhambra and San Juan. Each investment preserves and expands affordability, ensuring more families have access to safe, quality homes.

Since 2009, MTW has demonstrated its value by giving Opportunity Home the ability to respond to local needs with innovation, use resources wisely, and pair housing with supportive services that change lives. Guided by our Board of Commissioners, driven by the dedication of our staff, and sustained by the trust of our residents and community partners, we remain committed to building on this foundation — preserving homes, expanding opportunity, and creating pathways for families to thrive.

Warm regards,
Michael Reyes
President and CEO

Opportunity Home San Antonio Leadership

Board of Commissioners

Estrellita Garcia-Diaz, Chair
Leilah Powell, Vice Chair
Gilbert Casillas
Janet Garcia
Barbara Ankamah Burford

Executive Team

Michael Reyes, President and Chief Executive Officer
Timothy Alcott, Executive Vice President of Development and General Counsel
Diana Kollodziej Fiedler, Executive Vice President and Chief Financial Officer
Muriel Rhoder, Executive Vice President and Chief Administrative Officer
Aiyana Longoria, Chief Strategy, Data and Innovation Officer
Jose Mascorro, Chief Operating Officer
Teresa Menendez Myers, Chief of Staff
Lorraine Robles, Chief Real Estate and Development Officer

Senior Team

Jo Ana Alvarado, Senior Director of Innovative Technology
Miranda Castro, Senior Director of Asset Management
Hector Martinez, Senior Director of Construction Services and Sustainability
Aaron Sladek, Senior Director of Finance and Accounting
Stephanie Rodriguez, Senior Director of Assisted Housing Programs
George Ayala, Director of Procurement
Ruth Bautista, Director of Public Housing
Victoria Febus, Director of Affordable Housing Communities
Domingo Ibarra, Director of Security
Janie Rodriguez, Interim Director of Human Resources
Allison Schlegel, Director of Internal Audit
Susan Ramos-Sossaman, Director of Community Development Initiatives

MTW Contacts

Aiyana Longoria, Chief Strategy, Data and Innovation Officer
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Section I. B. | Overview of Short-term and Long-term MTW Goals and Objectives

Since 1937, Opportunity Home San Antonio has committed more than 85 years to building and maintaining affordable housing for residents of San Antonio.

Opportunity Home San Antonio provides housing to over 65,500 children, adults, and seniors through four housing portfolios – Public Housing, Housing Choice Vouchers, Affordable Housing Communities, and other communities in partnership with non-profit entities and other agencies. Opportunity Home currently employs over 500 people and has a total annual operating budget of $255 million. Existing real estate assets are valued at over $825 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 short-term and long-term future. In the final months of FY24-25, the Organization began developing an updated strategic plan that is expected to be finalized at the beginning of the 2026 calendar year. This strategic plan will guide the Organization through the next 11 years, leading up to the Organization's 100th anniversary in 2037.

The following section shares the Organization's currently adopted strategic plan values and outcomes that remain in place while the updated strategic plan is developed.

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 three key populations: residents, employees, and the community.

- Residents have meaningful housing choice
- All residents receive the same housing assistance or support service outcomes
- Residents' customer experience is compassionate, relieves suffering, and improves their quality of life (Compassion)
- Residents experience a high standard of housing assistance that improves continuously (Excellence)
- Employees thrive at work
- Employees manage data effectively and ensure the quality and security of data
- Employees' internal customer experience is compassionate, improves work experience, and supports a good work-life balance (Compassion)
- Community trusts Opportunity Home and invests in our mission
- Community economic and health benefits are sustained and improved for future generations

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.

Gloria Salazar

Gloria Salazar is a Public Housing participant who graduated with a bachelor's degree in Theater Arts from the University of the Incarnate Word in December 2024. She has aspirations of being an actress and starring in Broadway and Spanish-language television shows someday.

Throughout Salazar's life, education has played center stage. She earned an associate degree through a dual-credit program at John F. Kennedy High School, and as a result of her academic success, became a three-time Opportunity Home Resident Scholarship recipient. The scholarships helped her further her education with less financial constraints.

Her post-academic career brought her to Opportunity Home as a full-time employee, where she assisted individuals with their housing concerns and needs. With a desire to give back to the organization that supported her growth as both a resident and employee, Salazar volunteered to display her performing talents at our 2025 Mother's Day Celebration, performing a rendition of Amor Eterno for the mothers from our housing programs in attendance.

"Opportunity Home has helped carry me to my success," she said. "The Organization helped me as a baby, kid, and a college student. You never made me feel left out. With your help, it made me believe in possibilities in a world that doesn't seem possible."

Gardenia Guerra

After battling struggles as a single mother, Gardenia Guerra was determined to break through and create a better life for her family.

The Public Housing resident joined our Family Self-Sufficiency program five years ago in hopes of building stability and purchasing her first home.

“Purchasing my first home would mean I am finally able to give my children a better quality of life,” she said. “I used to move from city to city, and I don’t want my kids to go through that anymore.”

She has been full speed ahead in achieving her goals. Gardenia secured a 3.02 GPA while pursuing an associate degree in Applied Science from St. Phillip’s College and working as a medical assistant at CommuniCare Health Center.

The single mother aspires to be a licensed vocational nurse and eventually as a registered nurse - rewarding career paths that give her family a better opportunity toward achieving prosperity. “It has meant the world to me to achieve the success I have had so far,” she said. “The success I have reached gives me not only a better opportunity at life, but also for my kids.”

Gardenia’s success is an inspiring turnaround after financial struggles led to homelessness. To give herself the best chance for a return to stability, she has utilized every available resource provided by the FSS program - from daycare services to insightful financial literacy courses for improving her income.

Through the years, the program has provided Gardenia with impactful resources that gave her the best chance to turn her life around. Early in her enrollment, she completed a Health Profession Opportunity Grant Program and received her certified nursing assistant certification. When challenges arose with securing internet access, FSS specialists connected Gardenia to BiblioTech’s services to ensure she could complete essential schoolwork without disruption.

“I wouldn’t be here without these opportunities,” Gardenia said. “The FSS program has been my support and backbone.”

Eve Ochoa

The ConnectHomeSA program equipped Eve Ochoa with the confidence to embrace the digital world with open arms.

Thanks to her participation in the program, she gained the ability to navigate the digital space safely, comfortably, and purposefully.

With aspirations of returning to the workforce following a battle with health challenges, Ochoa applied her newfound digital skills toward learning how to successfully complete interviews and submit online applications.

“It feels empowering to have these new skills,” Ochoa said. “I feel more confident about using a computer by myself without asking my children for help. That is a good thing.”

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
Permanent Supportive Housing (PSH) Project	25	0	N/A	N/A	N/A
PSH / Other Projects	100	80	Committed	No	The Organization has committed 80 PBV's at "The Commons at Acequia Trails" PSH project
Total: Planned or Actual Newly Project-Based	125	80			

* 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:
25 PSH PBV's were added in the final days of FY24 and reported on in that year's respective Report. The Organization was able to sign an AHAP to commit 80 PBV's instead of 100 based on the PBV cap at the project selected. These PBV's will be based at the PSH project "The Commons at Acequia Trails" which is under construction and expected to come online in calendar year 2026.

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	88	88	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) 53 support Family Homeless Referral Program
Rosemont at Highland Park	20	20	Leased / Issued	No	Beacon Community - supports Family Homeless Referral Program (FY15-3 Activity)
425 San Pedro	0	25	Committed	No	PSH in partnership with SAMM and SAHT
Aspire at Tampico	0	20	Leased / Issued	No	Existing Community MPBV

PROPERTY NAME	NUMBER OF PROJECT-BASED VOUCHERS (Planned*)	NUMBER OF PROJECT-BASED VOUCHERS (Actual)	STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
Total: Planned and Actual Existing Project-Based	**183**	**228**			

* 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:

45 total PBV's were added beyond FY25 planned numbers.
25 PBV's were added at 425 San Pedro, a Permanent Supportive Housing project in partnership with SAMMinistries and the San Antonio Housing Trust. 20 Modified PBV's were added at Aspire at Tampico, an existing apartment community.

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: No change. MTW baseline was equal to 12,460 in FY25.

LNT: Added multiple properties to the MTW Local Non-Traditional housing stock: 100 Labor Downtown (44 units), Snowden Living (135 units), San Juan Square I (97 units), The Alhambra (126 units). Midcrowne was held due to MTW funds not being applied during the Plan Year. Additionally, Homestead began coming offline in June 2025 for demolition. The FY26 MTW Report will have final updates as much of the work will happen in that Plan Year.

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. Funding from other sources outside of MTW are not reflected.

Property	Description
Alazan-Apache	Asbestos and Mold Abatement, Rebuild Water Heater Shelter, Community Room Roof Replacement
Blanco	Post Fire Repairs
Cassiano	Window Replacement
College Park	Clean and Waterproof Elevator Pits
Fair Avenue	Elevator Modernization
Highview	Mold Remediation
LC Rutledge	Asbestos Abatement
Lincoln Heights	Water Heater Room Rebuild, Mold Abatement and Abatement
Lila Cockrell	Demo / Reinstall Sheetrock
Linda Lou	Exterior Light Replacement
Mirasol	HVAC Unit Replacement
Park View	Elevator Modernization
Riverside	Exterior Renovations and Site Improvements, Asbestos Abatement
Tarry Towne	Post Fire Restoration and Remodeling, Sewer Line Replacement
Victoria Plaza	Smoke Detector Installation, Roof Replacement
Villa Hermosa	Asbestos Abatement
Villa Tranchese	WiFi Line Movement, Elevator Modernization, Fire Protection Retrofit
Westway	Community Center Remodel
Williamsburg	Plumbing

Property	Description
PHA Wide	Mold, Asbestos and LBP surveys, Environmental Review Records, Project Management Salaries

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
Public Housing Units Leased	69,924	69,420	5,827	5,785
Housing Choice Vouchers (HCV) Utilized***	129,600	132,528	10,800	11,044
Local, Non-Traditional: Tenant-Based	N/A	N/A	N/A	N/A
Local, Non-Traditional: Property-Based	28,800	27,336	2,400	2,278
Local, Non-Traditional: Homeownership	N/A	N/A	N/A	N/A
Planned and Actual Totals:	**228,324**	**229,284**	**19,027**	**19,107**

* "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).
*** "Housing Choice Vouchers (HCV) Utilized" includes all SPV's within the MTW PHA's portfolio.
^^ 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:
Overall, the Organization served more households than planned in FY2025. This is due to a continued push in operational and administrative efficiencies. The Organization's Housing Choice Voucher, and Local Non-Traditional portfolios have continued to improve staff training and make processes more efficient to reach and surpass the planned number of households served. Public Housing increased actual households served numbers as compared to FY2024, and continues to improve their portfolio's processes and procedures to reach planned numbers.

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/#	N/A	N/A	N/A	N/A
Property-Based	FY2011-1e: Preservation & Expansion	28,800	27,336	2,400	2,278
Homeownership	Name/#	N/A	N/A	N/A	N/A
Planned and Actual Totals		**28,800**	**27,336**	**2,400**	**2,278**

* 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	N/A	N/A

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
Public Housing	The Organization has continued to increase occupancy in the Public Housing portfolio and was able to achieve 97% occupancy in the

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
	final months of FY2025. Coming out of the pandemic era, the Organization partnered heavily with the City of San Antonio in assistance efforts to move residents onto repayment agreements to prevent homelessness and reduce evictions. Throughout the FY, the Organization saw issues with vandalism and loitering of vacant units and empty properties that had suffered environmental damage reduced due to the use of DAWGS vacant property security services. The Organization brought on new make-ready vendors and began holding on-site new resident orientations to reduce downtime of turning applicants for move-ins. The Organization has also worked on reducing overages of waste by more heavily monitoring dumpsters leading to reduced costs and enhanced curb appeal.
Housing Choice Voucher	None, HCV was able to maintain the internal target for budget purposes to ensure the combination of LNT, PH and HCV met the baseline number.
Local, Non-Traditional	The Organization continues to diversify its Local, Non-Traditional portfolio and work towards achieving internal occupancy goals. Throughout the FY, the biggest challenge across the program was marketing and training. Competing with new developments in the same area created challenges, however the Organization has boosted website and social media marketing with assistance from our Public Affairs department, and program staff attend resource fairs throughout the city to promote our properties and their affordability. Plans were put in place during FY25 to revamp training and provide core sales, marketing and compliance skills to onsite property staff and continued training will be a major focus in FY26.

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
Accessible Unit	For applicants who require a 504 accessible unit	2,628	Open	Yes
East Meadows PBV	Project Based Voucher Site Based	2,732	Closed as of 6/21/21	No
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)	2,478	Open	Yes
Emergency Housing Voucher WL	This waitlist is used exclusively for EHV referrals from our partner, Close to Home	0	Private waitlist not open to public, used for EHV referrals	No
Family Public Housing	For applicants who are in families	42,633	Closed as of 5/26/25	Partially opened
Local, Non-Traditional Property-Based	Site-Based	0	Closed (Referrals Only)	No
Gardens at San Juan Square PBV	Project Based Voucher Site Based	5,625	Closed as of 6/21/21	No
Snowden Project Based	Project Based / Site-based	268	Closed as of 3/17/25	Yes
La Posada Mod Rehab	Site-based	8,516	Currently closed as of 8/13/23	No
PBV Referred Beacon	Project Based Voucher Site Based	0	Not open to public, used for S8 Special Referrals	No
Prospect Hill Mod Rehab	Site-Based	457	Currently closed as of 8/13/23	No

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
Public Housing (Site-based)	Public Housing Waiting List Households (Site-Based)	0	Permanently closed 11/13/24	No
Section 8 Tenant Voucher	Voucher	17,123	Closed	No
Stability Voucher	Exclusively for stability referrals	0	Private waitlist not open to the public	Yes
Serento Mod Rehab	Site-Based	0	Permanently closed 9/10/24	No
Wheatley Park Senior PBV	Project Based Voucher Site Based	105	Closed as of 8/13/23	No

Please describe any duplication of applicants across waiting lists:
As of June 30, 2025 the total number of unique applicants is 63,405.

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 Preferred Development Waitlists	Completed maintenance and permanently closed out the Preferred Development Waitlists on 11/5/24. The applicants who responded to these waitlists moved to other General Public Housing waitlists, including: Family Public Housing, Elderly Mix Public Housing, and Accessible Units.
Snowden Project Based (Previously known as Income Based Housing Assistance (IBHA))	Snowden Project Based replaced the previous “Income Based Housing Assistance" (IBHA) waitlist. The Snowden Project Based waitlist opened on 12/26/24 and closed on 03/17/25.

WAITING LIST NAME	DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST
Serento Mod Rehab	Permanently closed waitlist in September 2024.
La Posada MOD Rehab	Completed waitlist maintenance in December 2024.
Prospect Hill Mod Rehab	Completed waitlist maintenance in December 2024.

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	582
49%-30% Area Median Income	194
Below 30% Area Median Income	82
Total Local, Non-Traditional Households Admitted	**858**

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%

FAMILY SIZE	OCCUPIED PUBLIC HOUSING UNITS	UTILIZED HCVs	NON-MTW ADJUSTMENTS*	BASELINE MIX NUMBER	BASELINE MIX PERCENTAGE
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:

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%	7,875	41%	5%
2 Person	16%	3,833	20%	4%
3 Person	18%	2,960	15%	-3%
4 Person	15%	2,173	11%	-4%

5 Person	9%	1,350	7%	-2%
6+ Person	7%	1,060	6%	-1%
TOTAL	**100%**	**19,251**	**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:

None.

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	99	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.
FY2020-1: College and University Homeless Assistance Program	2	
Public Housing (New to self-sufficiency in Plan Year)	2	
	0	**(Households Duplicated Across MTW Activities)**
	103	**Total Households**

MTW ACTIVITY (NAME and NUMBER)	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY*	MTW PHA LOCAL DEFINITION OF SELF-SUFFICIENCY
		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 and their respective status for FY2025.

MTW Activity	Implementation 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
13-4 - 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
15-3 - 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
21-1 - Next Step Housing Program (THRU Project)	Implemented/Ongoing
22-1 - Opportunity Home Partnerships Providing Basic Needs for Residents Through Income Exclusions	Implemented/Ongoing
23-1 - Property-based local, non-traditional rental subsidy program (referred to locally as PH-like)	Not Yet Implemented
24-1 - Elimination of Earned Income Disregard	Implemented/Ongoing

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 FY2010-2011 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 and ongoing.

This fiscal year, the Organization used MTW flexibilities to expand affordable housing at 2 new properties (100 Labor - 44 units; Snowden Living - 135 units) and preserve affordable housing units at 3 multi-family properties (San Juan Square I - 97 units; The Alhambra - 126 units; Elan Gardens - 228 units). As a result, the organization preserved a total of 3,962 units and served an average of 2,437 households under the Local, Non-traditional category.

Midcrowne has been excluded from the LNT count due to MTW funds not being applied as expected during FY25. The Organization is hoping to apply funds during FY26 to begin counting the property under the preservation portion of this activity.

MTW Local Non-Traditional Household (LNT) Tracking: LNT Households are defined as Households living in a unit that is Non-Section 8/9, reserved for 80% AMI and below, and has MTW funds invested in it. Below is the summary by property.

Expansion Details				
Property	**Fiscal Year Added**	**Total Units**	**Affordable Units (80% AMI) - Non Section 8/9**	**FY2025 Unit Month Average LNT Households**
The Park at Sutton Oaks	FY2014	208	113	60
Gardens at San Juan Square	FY2015	252	158	141
East Meadows I	FY2017	215	77	54
East Meadow II	FY2020	119	53	28
Legacy at Alazan	FY2022	88	40	29
Tampico	FY2022	200	136	110
Bristol at Somerset	FY2024	348	348	309
100 Labor	FY2025	213	44	42
Snowden Living	FY2025	135	135	47
GRAND TOTAL		**1,778**	**1,104**	**820**

Preservation Details				
Property	**Fiscal Year Added**	**Total Units**	**Affordable Units (80% AMI) - Non Section 8/9**	**FY2025 Unit Month Average LNT Households**
Rosemont at Highland Park	FY2021	252	232	103
Costa Valencia	FY2022	230	230	66
San Juan Square II	FY2023	144	90	42
Woodhill	FY2023	532	469	220
The Ravello	FY2023	252	252	175
Bella Claire	FY2023	67	67	58
Towering Oaks	FY2023	128	128	72
Churchill Estates	FY2023	40	40	32
Claremont	FY2023	4	4	2
Warren House	FY2023	7	7	5
Homestead	FY2023	157	157	48
Monterrey Park	FY2023	200	200	156

Preservation Details				
Property	**Fiscal Year Added**	**Total Units**	**Affordable Units (80% AMI) - Non Section 8/9**	**FY2025 Unit Month Average LNT Households**
La Providencia	FY2023	90	90	74
Castle Point	FY2023	220	220	185
Villa de San Alfonso	FY2024	29	29	17
Legacy at Crown Meadows	FY2024	192	192	127
Midcrowne	*FY2024*	*N/A*	*N/A*	*N/A*
San Juan Square I	FY2025	143	97	36
The Alhambra	FY2025	140	126	58
Elan Gardens	FY2025	228	228	141
GRAND TOTAL		**3,055**	**2,858**	**1,617**

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

FY2011-9 | Allocate tenant-based voucher set-asides for households referred by non-profit partners who provide supportive services

Plan Year Approved, Implemented, Amended

This activity was approved and implemented in the FY2010-2011 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 Close to Home. 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. This activity has been amended as follows:

- FY 2019-2020:
    - Added up to forty (40) additional tenant-based vouchers to support a Permanent Supportive Housing (PSH) provider currently partnered with the organization administering the Move On Program.
    - Adopted alternative portability policies for all set-asides under this activity to ensure participants are able to continue receiving supportive services by partners while receiving the set-aside housing assistance. Under this alternative policy, recipients would not be able to port or take their set-aside voucher to another jurisdiction.
    - Adopted a hardship policy: a set-aside voucher recipient may be given the opportunity to port out of the Organization's jurisdiction in the following cases:
        - If the recipient has an approved reasonable accommodation need; or
        - If the recipient requests an emergency transfer request under the VAWA Act of 2013.

Impact & Update: This activity is fully implemented and ongoing. The tables below show the number of households being assisted and their median tenure. Utilization of set-asides has increased since last year. The organization continues to work closely with partners to lease-up all set-asides that have been allocated.

Opportunity Home Data Metrics:

Households Assisted by Services

Unit of Measurement	Outcome	Notes
Number of households receiving services	465	Increased from previous year's usage outcome

Median Tenure

Unit of Measurement	Outcome	Notes
Median tenure or length of stay in the set-aside program	4.5 years	No major change from previous year's tenure outcome

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

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

Plan Year Approved, Implemented, Amended

This activity was originally approved as part of the FY2012-2013 MTW Plan. Implementation began on January 1, 2013.

Description/Impact/Update

Description: This activity is designed to reduce cost and increase cost effectiveness. 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 or owned by an Opportunity Home affiliate under the Organization's partnerships portfolio. At the time of implementation, Opportunity Home's Inspections department was equipped to absorb the additional inspections without the need for additional full-time or part-time equivalent positions.

At implementation, the Organization estimated that the impact to the Organization would be a cost savings of $55.46 per inspection. This figure was the projected result of replacing third-party contractors with in-house inspectors. At the time this activity was adopted, the cost of contracting with a third party to conduct 2,391 inspections annually was $182,478 per fiscal year, which translated into a cost per inspection of $76.32. The cost per inspection using Opportunity Home staff was estimated at $20.86. The net savings per inspection was projected to be $55.46. Currently, the Organization estimates the net savings to be $24.35 with in-house inspections occurring at $75.65 per inspection and third-party contracting inspections estimated at $100 per inspection.

Impact/Update: This activity is implemented and ongoing and the Organization continues to experience cost efficiencies by conducting inspections of Opportunity Home properties by Opportunity Home inspectors. The Organization conducted 2,825 inspections in FY25 resulting in a cost savings of $68,788.75.

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

FY2014-3 | Faster Implementation of Payment Standard Decreases

Plan Year Approved, Implemented, Amended

This activity was originally approved as part of the FY2013-2014 MTW Plan and implemented in the same fiscal year.

Description/Impact/Update

Description: This activity is designed to reduce cost and increase cost effectiveness. 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 waiver was utilized in FY25 and resulted in cost savings for the Organization. The benchmark was updated in January 2024 with an average of 415 households served under this activity, multiplied by $889.52 resulting in a HAP cost of $369,152. During FY25, the HAP cost equaled $357,985 resulting from 415 households multiplied by $862.61.

Opportunity Home Data Metrics:

Agency Cost Savings

Unit of Measurement	Outcome
Total cost of the task in dollars (decrease).	$134,004.00

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

FY2014-6 | HCV Rent Reform

Plan Year Approved, Implemented, Amended

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 FY2013-2014 Plan and began implementation in July 2014. For FY2015-4 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.

(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 and ongoing. There are no concerns with the cost-savings indicator. The Organization will continue to monitor error rates internally, however it will not be reported on with this activity. New QA/QC procedures have been implemented to ensure utility allowance rates are being correctly input.

Opportunity Home Data Metrics:
Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome
Total cost of the task in dollars (decrease).	1 hours per processed file	.25 hours per processed file	2,844 files processed $70,773 in savings

Actual Non-Significant Changes

None.

Actual Significant Changes

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.

FY2019-2020 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 Close to Home. Close to Home is the local Continuum of Care Lead Organization 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.
  - Affordable Housing Communities or Partnerships: Up to fifty (50) modified PBVs at one of Opportunity Home's Affordable Housing Communities 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.
  - Affordable Housing Communities: Up to thirty (30) modified PBVs at a new Opportunity Home - Affordable Housing Communities 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 Organization's modified project based units.

FY2020-2021 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.
- Family Homeless: Twenty (20) MPBVs were allocated to Rosemont at Highland Park, a property in the Organization's Affordable Housing Communities Portfolio. Due to lack of vacancies, the

Organization 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 Organization'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 Organization'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 is designed to meet the statutory objectives of increasing housing choices for low-income families and increasing cost effectiveness. 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 ongoing and continues to facilitate the expansion and preservation of affordable housing thereby increasing housing choices. The Organization recently allocated 53 additional vouchers effective January 2024 at Woodhill to support the Family Homeless Program.

Opportunity Home Data Metrics:

Units of Housing Made Available

Unit of Measurement	Baseline	Benchmark	Outcome
Total issued/committed PBV's at the end of the Plan Year	N/A	N/A	308
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase)	N/A	N/A	0

Median Household Income

Unit of Measurement	Baseline	Benchmark	Outcome
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	
80% AMI	80% AMI	75% AMI	N/A - no households
60% AMI	60% AMI	55% AMI	49% AMI
50% AMI	50% AMI	45% AMI	39% AMI
30% AMI	30% AMI	25% AMI	12% AMI

Actual Non-Significant Changes

The Organization has allocated an additional 53 units at Woodhill to support the Family Homeless Program in January 2024. In addition, the Organization may cap housing subsidies to not exceed the current HUD funding amount per voucher.

Actual Significant Changes

None.

FY2019-1 | Local Implementation of SAFMR

Plan Year Approved, Implemented, Amended

This activity was approved in FY2018-2019 and implemented in the same fiscal year.

- FY2018-2019: 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
- FY2019-2020: 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).

Because of the potential impact (positive and negative) on a large number of voucher households, the Organization implemented the activity over multiple fiscal years in order to control for negative and unanticipated consequences, to make use of the latest research and market data, and to maintain the number of households served. HUD approved this phased-in approach in FY2019. Below are the principles and parameters the Organization used in the development of the activity:

1. Maintain Number of Households Served
   a. No decrease in capacity to serve the same number of households
2. Minimize Negative Impact
   a. Minimize negative impact for existing households in low-cost neighborhoods
   b. No disparate impact on protected classes, including locally recognized classes (sexual orientation, gender identity, veteran status, and age)
3. Make the SAFMR as easy to use as possible
   a. Households and landlords have limited time and resources; program design should facilitate program implementation
4. Leverage the Value of the Voucher
   a. Maximize value of vouchers in targeted growth areas and rapidly changing neighborhoods

Local Submarket Payment Standards: This activity makes use of one waiver: establish local submarket payment standards.

Currently, the U.S. Department of Housing and Urban Development (HUD) publishes fair market rents (MAFMRs) annually for each metropolitan statistical area in the United States and requires each housing authority to adopt a payment standard schedule for each MAFMR area in its jurisdiction. HUD

allows housing authorities to establish the payment standard amounts at any level between 90% and 110% of the published FMR. Payment Standards are used to calculate the maximum subsidy that the PHA will pay each month toward rent and utilities for families with Housing Choice Vouchers.

Prior to the implementation of SAFMR, the process for establishing payment standards includes analyzing the published MAFMRs when published, presenting the recommended schedule to the Board of Commissioners for approval, and implementing the new schedule over a twelve month phase-in for clients that have a reexaminations and all new admission contracts effective on or after the effective date. Due to biennial and triennial recertifications under the Organization's MTW status, the impact to HAP expenditures are typically phased-in over a period of three years.

Under the new Small Area Fair Market (SAFMR) regulation, Opportunity Home is required to implement this process using SAFMRs which are based on ZIP codes as opposed to the San Antonio-New Braunfels Metropolitan Statistical Area; however, because the Organization is designated as a Moving to Work (MTW) Program, it is authorized to adopt and implement any reasonable policy to establish payment standards for housing choice vouchers that differ from the currently mandated program requirements. The Organization requested and received a waiver in Year 1 (FY 2018-2019).

On June 27, 2019, the Organization received HUD approval to extend this MTW Agreement provision to its HUD-VASH program. The Organization implemented the extension of this waiver to the HUD-VASH Program in FY2020.

To stay consistent with the annual payment standard update approval process, new payment standard schedules will be approved by a separate Board Resolution. Annual modifications to payment standards are allowed with the Organization Board approval where appropriate/necessary. The Organization anticipates reviews of the payment standards every year in August/September when new SAFMRs are published by HUD.

Zip Code Grouping methodology: The Organization explored a variety of grouping options ranging from five to fifteen groups using a cluster analysis based on the published HUD SAFMRs. The goal of the clustering was to minimize within tier rent differences and maximize between tier differences. This would ensure that when the payment standard was set for each tier, it would be an appropriate amount for all zip codes within the tier. The ten tier option was chosen after considering administrative burden, financial impact, and after building consensus with local stakeholders. In addition, the Organization had implemented HUD's SAFMR for its smaller special programs using ten (10) tiers - which offered some consistency for staff, clients, and landlords. As of FY2020, special programs are now under the Organization's MTW implementation of SAFMRs.

Payment Standard methodology: The Organization reviewed various methods for setting the payment standard in each Tier. The goal of the review was to establish a method that allowed the Organization to consistently determine payment standards for each tier and bedroom size while also balancing the financial impact. The method that found the balance between the financial impact and the goals of the SAFMR policy was determined to be ninety percent (90%) of the minimum SAFMR within each Tier. For example, in Tier 1 there are seven (7) ZCTAs. The minimum or lowest SAFMR for a two-bedroom among these seven ZCTAs is $790. The payment standard for the two-bedroom is set to ninety percent (90%) of $790, or $711. This method was applied to all ten tiers and all bedroom sizes.

Hardship policies: This activity is not expected to impact existing clients' tenant share; however, the Organization recognizes the need for a hardship policy in concert with the proposed policy changes to

ensure that households with documented urgent needs or extenuating circumstances are not unduly burdened by the policy changes.

The Organization's current policy on financial hardships regarding minimum rent and zero income declaration will continue to apply to participants under this activity in accordance with §6.3.A(3) and §6.3.B of the Administrative Plan. In addition, the Organization has one MTW activity with a special hardship policy: FY2014-6: Rent Simplification. Hardships outlined in that activity will apply under this activity. Please refer to the MTW activities listed above in Section 4 of this plan for specific hardship criteria. Unless otherwise noted, all elements are applicable for all activities.

The Organization has adopted two SAFMR-specific mechanisms to provide protection for clients including (1) Hold Harmless Policy and (2) Exception Overlay Policy. In addition, clients have access to existing hardship and reasonable accommodation policies outlined in 16.2.B(7) of the Administrative Plan. The mechanisms specific to SAFMR are described below.

Hold Harmless Policy: For families whose payment standard falls outside of the basic range as a result of a decrease in FMRs (including a decrease in FMRs due to the implementation of Small Area FMRs), the Organization will not reduce the payment standard amount for as long as the HAP contract remains in effect.

Exception Overlay Policy

A. **Exception Overlay Policy:** Households will receive automatic exception overlay relief, as discussed below, if:
    a. The household is currently under contract for a unit located in the Organization's exception overlay.
    b. The landlord requests an increase in the rent amount after the first contract year and the new contract rent is determined to be reasonable through the Organization's rent reasonableness process.
    c. The household's new total monthly family contribution as a percent of household income (rent burden) increases by more than 10% from the current rent burden and the household realizes it's unable to afford their rent portion as a result of the increased contract rent.
    d. The new monthly increase is not a result of a change in household circumstances.
B. **Exception Overlay Policy Remedy:**
    a. The Organization will cap the total monthly family contribution at the current amount for the remaining months in their current lease term.

Impact/Update: This activity is implemented and ongoing and continues to assist the Organization in its efforts to increase housing choices. A new schedule and modifications to the groupings under Phase II was implemented for new admissions and movers effective January 1, 2022 and recertifications effective February 1, 2022.

FY25 Payment Standards were set at 84% to 98% of SAFMRs to be effective for new admissions January 1, 2025 or later and recertifications effective April 1, 2025 or later.

The Organization saw a slight increase in households moving to better units and/or neighborhoods. There was also an increase in the overall percentage of vouchers issued being leased-up within 120 days and a slight decrease in the overall number of days searching by the Post-Move Group.

Opportunity Home Data Metrics:

Increase in Resident Mobility

Unit of Measurement	Benchmark	Outcome	Notes
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase). "Better defined as moving to Groups 4-10"	41%	54%	Increase of 4% from previous FY

Lease-up Success Rate by Post-Move Group

Unit of Measurement	Benchmark	Outcome	Notes
Percent of vouchers issued that were leased-up within 120 days	86%	**Overall: 66%** Group 1: 47% Group 2: 63% Group 3: 62% Group 4: 64% Group 5: 65% Group 6: 50% Group 7: 66% Group 8: 70% Group 9: 80% Group 10: 89%	The overall percentage saw an increase of 8% from the previous FY

Average # of days searching by Post-Move Group

Unit of Measurement	Benchmark	Outcome	Notes
Average number of days between the date the voucher is issued and the date the request for tenancy (RTA) is approved	58 days	**Overall: 82** Group 1: 103 Group 2: 89 Group 3: 77 Group 4: 70 Group 5: 90 Group 6: 72 Group 7: 83 Group 8: 88 Group 9: 61 Group 10: 83	The overall number of days searching decreased by 3 compared to the previous FY

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

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

Plan Year Approved, Implemented, Amended

This activity was approved in the FY2018-2019 MTW Plan and implemented in FY2018-2019.

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

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. This activity has four main components that are designed to streamline and simplify the recertification process: (1) alternate schedule, (2) alternate public housing review procedures, (3) alternate income verification methods, and (4) alternate payment standard increase procedures. 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.

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. As a result of HOTMA, this specific change to HUD forms is no longer needed; however, in the future, the Organization may create its own local forms with different expiration dates or other elements to accommodate this activity.

(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 Organization has been using alternative schedules since 2011. In FY2023, the organization updated the schedule for all households to triennials.

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 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. This activity allows the Organization to conduct review procedures related to flat rent notice and family composition updates for PH individuals at the time of reexamination.

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

Prior to this activity, the Organization accepted self-certification for assets valued below $5,000. In order to further streamline administrative processes, the Organization 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 is still required for assets totaling a value more than $25,000.

According to HUD's Verification Hierarchy, the Organization 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, the Organization 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, the Organization wanted to reduce the number of applicants re-submitting documents for approved extensions of vouchers (if in HCV Program) and/or reasonable accommodations. The Organization 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, unless explicitly exempted.

On June 13, 2019, the Organization received HUD approval to extend these MTW Agreement provisions to its HUD-VASH program. The Organization 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.

Opportunity Home Data Metrics:

Organization Cost Savings

Unit of Measurement	Baseline	Outcome
Total cost of the task in dollars (decrease)	HCV: $407,067 PH: $234,932 Total: $641,999	HCV: $45,191 PH: $45,924 Total: $91,115 Cost Savings: $594,506

Planned Non-Significant Changes

HUD has delayed the implementation date for the HOTMA asset provisions and the updated verification hierarchy. Therefore, planned changes did NOT take effect on January 1, 2025, as originally planned. Once HUD releases a new implementation date, the policy will be updated, and portions of this MTW activity will no longer be needed since HOTMA rules allow for self-certification of net assets of up to $50,000.

Actual Significant Changes

None.

FY2020-1 | College & University Homeless Assistance Program

(formerly Palo Alto College, College Homeless Assistance Program)

Plan Year Approved, Implemented, Amended

This activity was approved in the FY2019-2020 MTW Plan and implemented in the same fiscal year.

Description/Impact/Update

Description: This activity is designed to achieve the MTW statutory objective to increase housing choices, by providing homeless college students stable housing. 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 being proposed separately from the Organization's set-asides allocated under FY2011-9.

This activity allows the Organization to initially set-aside up to 20 tenant-based housing choice vouchers for households referred by Palo Alto College (PAC) and 30 tenant-based housing choice vouchers for St. Philip's College (both Alamo Area 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 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 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 alternative payment standard schedules (see FY 2019-1: Local Small Area Fair Market Rent Implementation), and MTW alternative examinations (see FY 2019-2: Alternate Recertification Process (PH and HCV)). Students have up to one year 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, the organization 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 organization 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(s)] 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 the Organization 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, the Organization will continue to assess if there is a need for continued assistance and will consider a preference for the HCV wait list.

Impact/Update: This activity is implemented and ongoing. The Organization has committed a total of 100 vouchers. Utilization is not at 100% due to graduation, missed in-person appointments, removal for non-compliance on eligibility requirements, and denials during in-person appointments for varying reasons. However, the Organization continues to work closely with partners for referrals. 13 students successfully completed their education and graduated during the fiscal year. As a result, the Organization is currently discussing the possibility of expanding education partners to offer vouchers to additional student populations and achieve higher utilization.

Opportunity Home Data Metrics:

Utilization

Number of vouchers allocated for the Plan Year	Number of vouchers being used at the end of the Plan Year	Utilization %
100	27	27%

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

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

Plan Year Approved, Implemented, Amended

This activity was approved in the FY 2020-2021 MTW Plan and implemented shortly after.

Description/Impact/Update

Description: This activity is designed to meet the statutory objective of increasing housing choices. 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 very few successful placements. After a post-implementation review, the Organization and partner have identified program design changes that require additional MTW waivers.

[1] Youth may currently be in extended foster care.

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.

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 fourth year of implementation and has increased but not fulfilled all the vouchers allocated. At the end of FY2025, the Organization had 7 youth housed through this small program and 2 youth completed the allocated time of 36 months. The Organization has planned to review this activity to determine how to reach full utilization and maintain it. In addition, the Organization has received 25 FYI vouchers. These vouchers may be used to serve the same population on a tenant-based level.

Opportunity Home Data Metrics:

Utilization

Unit of Measurement	Total Vouchers Available	Vouchers Used (as of 6/30/25)	Utilization %
Number of vouchers available compared to number being utilized	10	7	70%

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

FY2022-1 | Resident Income Exclusions

(formerly named: SAHA Partnerships Providing Basic Needs for Residents Through Income Exclusions)

Plan Year Approved, Implemented, Amended

The activity was approved in the FY2021-2022 MTW Plan and implemented in the same year.

Description/Impact/Update

Description: This activity is designed to meet the statutory objective of increasing housing choices. In addition, this activity is in alignment with the Organization'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. This activity establishes an alternative policy that excludes contributions in the household's annual income calculation. Specifically, contributions received directly by the household from a partner or contributions distributed to a household on behalf of a 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 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 the Organization.

Impact & Update: This activity is implemented and ongoing. The Organization's Community Development Initiatives department tracks the number of resident service events that occur throughout the Plan Year and totals the estimated dollar amount of in-kind value received to show this activity's impact.

Opportunity Home Data Metrics:

# of Events

Unit of Measurement	Outcome
Number of events during Plan Year	1,078

In-Kind Value Leveraged

Unit of Measurement	Outcome
Amount of funds leveraged in dollars	$1,811,486.30

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

FY2024-1 | Elimination of Earned Income Disregard

Plan Year Approved, Implemented, Amended

This activity was approved in the FY2023-2024 MTW Plan and is implemented. It is expected to be closed out once HOTMA regulations take effect and null the contents of the activity.

Description/Impact/Update

Description: This activity is designed to meet the statutory objective to reduce cost and achieve greater cost effectiveness in Federal expenditures.

- This activity replaces FY2013-2, Simplified Earned Income Disregard (S-EID) MTW Activity and eliminates EID for the Housing Choice Voucher (HCV) and Public Housing (PH) Programs. S-EID was originally implemented in PH as a way to simplify the traditional EID calculation while also expanding the number of months for which EID would be available to participants. However, following updates to the traditional EID rules through the Streamlining Final Rule published on March 8, 2016, the traditional rules were simplified beyond the S-EID established by Opportunity Home. S-EID has now been phased out. Opportunity Home continues to disregard income for Family Self-Sufficiency (FSS) participants and Jobs Plus Program participants in accordance with their program rules.
- Additionally, increases in income are no longer picked up in between recertifications for HCV and PH residents, and all residents are now on a triennial recertification schedule. Therefore, the EID timeframe and rules would no longer be effective in increasing self-sufficiency as Opportunity Home disregards income increases for all residents.
- The elimination of traditional EID will allow staff to focus on furthering the success of the FSS and Jobs Plus Program, which are both self-sufficiency programs that provide caseworker management and supportive education, training, employment and financial counseling coupled with the earned income disregard. The elimination of EID will also reduce cost and administrative burden with managing EID participants and calculating the EID correctly.
- As Opportunity Home has eliminated traditional EID through the S-EID MTW Activity, FY2024-1 will have been implemented already upon approval of the MTW Plan.

Impact/Update: The activity is ongoing and will remain implemented while fully updated HOTMA regulations are delayed in their implementation. This activity is expected to be closed once HOTMA regulations are fully implemented. Data collection has been closed for this activity to reduce unnecessary administrative burden.

Actual Non-Significant Changes

None.

Actual Significant Changes

None.

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 | Income Based Housing Assistance Program (IBHA)

Description

This activity was proposed and approved in the FY23 Plan and has been “Not Yet Implemented” since approval.

Discussion

The activity is designed to meet the statutory objective of increasing housing choices for low-income families and has not been implemented yet. The first property identified with intent to use this activity was Snowden, a senior living complex, but separate policies and procedures were not developed fully in time, and the project moved forward in development with the use of traditional LNT affordability methods. The policies and procedures guiding this activity are still being drafted for potential use in new upcoming projects.

The Organization has kept this activity as “Not Yet Implemented" until a final determination is made on the policy/procedure and financial opportunity to bring this activity online and use at a selected project.

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.

None.

Section IV. D. Closed Out Activities

1. **FY2011-1: Block grant funding with full flexibility**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity was closed in the FY2013-2014 Plan.
   ii. The activity was closed out due to its reference to the MTW Single Fund Flexibility, and not to any additional waivers.
2. **FY2011-1a: Promote Education through Partnerships**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity was closed in the FY2013-2014 Plan.
   ii. The activity was closed out because it uses only the MTW Single Fund Flexibility, and no additional waivers.
3. **FY2011-1b: Pilot Child Care Program**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. This activity was closed out in FY2011-2012.
   ii. The pilot childcare training program ended in the fall of 2011. While the program did have some success in FY2011 in assisting 10 residents in their completion of child care training and certification, there was not enough support for the program to continue.
4. **FY2011-1c: Holistic Case Management**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity was closed in the FY2013-2014 Plan.
   ii. The activity was closed out because it uses only the MTW Single Fund Flexibility, and no additional waivers.
5. **FY2011-1d: Resident Ambassador Program**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity was closed in the FY2013-2014 Plan.
   ii. The activity was closed out because it uses only the MTW Single Fund Flexibility, and no additional waivers.
6. **FY2011-2: Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of Public Housing**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity was closed out in the FY2013-2014 Plan.
   ii. The activity was closed out because faster transaction times have reduced the need for this activity.
7. **FY2011-3: Biennial reexamination for elderly/disabled (PH)**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year.
   ii. The activity was closed out because it was replaced by new activities FY2014-4 and FY2014-5.
8. **FY2011-4: Streamline methods of verification for PH and HCV**
   i. This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year. The activity has been closed out because it was replaced by new activity FY2014-1.
9. **FY2011-5: Requirements for acceptable documents for PH and HCV**
   This activity was originally approved as part of the FY2010-2011 MTW Plan and implemented in that fiscal year.
   ii. The activity has been closed out because it was replaced by new activity FY2014-1.

10. **FY2011-6: Commitment of project-based vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies (HCV)**
    i. This activity was approved as part of the FY2010-2011 Plan and implemented in that fiscal year.
    ii. This activity was designed to increase housing choices. The activity was proposed to be closed out because it will be superseded by FY2015-3.
11. **FY2011-7: Remove limitation of commitment on PBV so that PBV may be committed to more than 25% of the units in family developments without required provision of supportive services**
    i. This activity was approved as part of the FY2010-2011 Plan and implemented in that fiscal year.
    ii. This activity was designed to increase housing choices. The activity was proposed to be closed out because it will be superseded by FY2015-3.
12. **FY2011-8: Revise mobility rules for PBV**
    i. This activity was approved as part of the FY2010-2011 Plan and implemented in that fiscal year.
    ii. This activity was designed to increase cost effectiveness. The activity was proposed to be closed out because it will be superseded by FY2015-3.
13. **FY2012-10: Biennial Reexamination for Elderly/Disabled Participants on Fixed Income (HCV)**
    i. This activity was originally approved as part of the FY2011-2012 Plan and implemented in that fiscal year.
    ii. The activity has been closed out because it was replaced by FY2014-4.
14. **FY2012-11: Local Project Based Voucher Program for Former Public Housing Residents**
    i. This activity was originally approved as part of the FY2011-2012 Plan but was closed out before implementation.
    ii. The activity was closed due to discussions with HUD about the RAD option.
15. **FY2014-1: Streamline Reexamination Requirements and Methods (HCV)**
    i. This activity was originally approved as part of the FY2013-2014 Plan and implemented in that fiscal year. The activity was closed out as of FY2016.
    ii. This activity was designed to reduce cost and increase cost effectiveness, but was closed due to staff analysis finding that it was no longer needed.
16. **FY2013-1: Time-limited Working Household Preference Pilot Program**
    i. This activity was originally approved as part of the FY2012-2013 Plan. Implementation started in FY2014 and was closed out in FY2017.
    ii. This activity was designed to increase housing choices and promote self-sufficiency. The activity was closed after staff analysis determined it did not work for our housing populations in achieving its goal.
17. **FY2013-3: Standardize Section 8 and Public Housing Inspection Progress**
    i. This activity was introduced in FY2012-2013 and placed on hold. It was never fully implemented and subsequently closed in FY2017.
    ii. This activity was designed to unify Section 8 and Public Housing inspection standards. The intent was to raise lower standards to a higher, uniform level. It was anticipated that UPCS (Public Housing) would serve as a model for most elements, but some were to be derived from HQS (Section 8). This activity was placed on hold, pending results of HUD tests at other PHAs. HUD completed the study and conducted a demonstration. The Organization had no plans to

participate in the demonstration and implemented new inspection standards for Section 8 in accordance with guidelines set forth by HUD.

18. **FY2014-4: Biennial Reexaminations (HCV and PH)**
    i. This activity was approved in FY2014 and implemented in January 2014. The activity was closed out in the FY2018 Report.
    ii. The activity was replaced with the approved FY2019-2020 Alternative Recertification Process.
19. **FY2014-5: Triennial Reexaminations (HCV)**
    i. This activity was approved in FY2014 and implemented in January 2014. The activity was closed out in the FY2018 Report.
    ii. The activity was replaced with the approved FY2019-2020 Alternative Recertification Process.
20. **FY2016-2: Biennial and Triennial Notification of Rent Type Option**
    i. This activity was approved in FY2014 and implemented in January 2014. The activity was closed out in the FY2018 Report.
    ii. The activity was replaced with the approved FY2019-2020 Alternative Recertification Process.
21. **FY2014-2: Early Engagement (previously referred to as Path to Self-Sufficiency)**
    i. This activity was originally approved as part of the FY2013-2014 MTW Plan and implemented in that fiscal year. The activity was closed in the FY2021 Report.
    ii. Effective March 16, 2020, the Organization implemented its Workplace Transition Plan, Transition Level 1, Emergency Operations. On June 22, 2020 the Organization transitioned to Level 2, Modified Operations. As a result, all EEP sessions were canceled. The last EEP session was held in February 2020.
22. **FY2017-1: Thrive in Five**
    i. This activity was approved in December 2016 and implemented in FY2017. This activity was closed out in the FY2021 Report.
    ii. The activity was re-proposed to replace a previous pilot which was closed out in FY2016 (FY13-1 Limited Working Preference).
23. **FY2017-2: Restorative Housing Pilot Program**
    i. This activity was approved as part of the FY2016-2017 Plan and implemented in the same fiscal year. The activity was closed out in the FY2021 Report.
    ii. The activity was designed to promote self-sufficiency. It was a two-year pilot program that was unsuccessful in reaching the target population.
24. **FY2020-2: St. Phillips College Homeless Program (SPC-HP)**
    i. This activity was originally approved in FY2020 but was not implemented. This activity was closed out in the FY2021 Report.
    ii. The activity was designed to promote housing choice. It could not be implemented due to the new development project planned for project-based vouchers not being executed, however the partnership continues under the active FY2020-1 CHAP activity with tenant-based vouchers.
25. **FY2020-4: Time-Limited Workforce Housing Pilot Program (PBV)**
    i. This activity was originally approved in FY2020 but was never implemented. This activity was closed out in the FY2021 Report.
    ii. The activity was designed to promote housing choice but could not be implemented due to the new development project planned for project-based vouchers not being executed.
26. **FY2015-1: MDRC / HUD Rent Study**

i. This activity was originally approved in FY2015 as part of a study commissioned by the U.S. Department of Housing and Urban Development (HUD) to evaluate a Housing Choice Voucher (HCV) alternative rent reform policy (the "Study"). MDRC, a nonprofit and nonpartisan education and social policy research organization, conducted the Study on behalf of HUD. The study was originally scheduled to end in 2018, but was extended until FY2021 to ensure researchers are able to gather information from two triennial recertification periods. The agreement with the researchers ended in December 2021 and the last recertification was completed in March 2022. All MDRC participants were being transitioned to the rent structure as approved under FY2014-6.

27. **FY2013-2: Simplified Earned Income Disregard (S-EID)**

    i. 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 was superseded by FY2024-01 Elimination of Earned Income Disregard activity closed out in the FY2023 Report. The Organization is anticipating changes as a result of HUD's HOTMA Final Rule guidelines on January 1, 2024 which will eliminate EID.

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

    i. A new HUD 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 was moved to FY2014-6 and the FY2020-3 activity closed out in the FY2023 Report.

29. **FY2015-2 Elderly Admissions Preference at Select Public Housing Sites**

    i. This activity was originally approved as part of the FY2014-2015 MTW Plan and implemented November 1, 2014. The activity was closed out in the FY2025 Report.

    ii. This activity was closed out due to continued difficulty achieving target ratios at selected communities as elderly applicants remained low. Maintaining occupancy at these selected sites became a concern and after internal discussion with key departments, the activity was moved to be closed to allow higher occupancy and ensure housing choice is not diminished for non-elderly applicants.

    iii. This activity established a 4-to-1 elderly admissions preference at select communities to increase housing choices for elderly residents and reduce potential lifestyle conflicts between elderly and non-elderly residents. The Organization learned that these lifestyle conflicts do still exist but can be managed at the property level with continued elderly preference, while ensuring property staff are able to lease vacant units to non-elderly residents as needed to ensure those on our waiting list are housed faster.

30. **FY2021-2 Limiting Increases in Rent**

    i. This activity was approved in the FY2021-2021 Plan and was intended to be implemented in February of 2021. It was placed on hold and never fully implemented. The activity was closed in the FY2025 Report.

ii. This activity was closed out because the Organization is no longer implementing the rental cap, so the waiver that allows the Organization to limit rental increase requests to one per year was consolidated into FY2019-2 Alternate Recertification in order to streamline reporting and management.
iii. This activity was never fully implemented before its close out. The Organization has no final outcomes for this activity and pieces of it will continue in its consolidation.

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

The MTW PHA shall submit unaudited and audited information in the prescribed FDS format through the FASPHA, or its successor system.

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

Projects	Cumulative Expenditure as of 6/30/2025
Resident Services (CDI) and MTW Initiatives	$ 1,667,470
Lincoln Predevelopment Costs	98,105
Snowden Development Funding Gap	397,135
Alazan Phase I and Predevelopment Costs	1,150,041
Investment in Midcrowne and Ravello Properties	289,866
Investment in MTW Units at Tax Credit/Beacon Properties	9,673,779
Additional Investment in the 100 Labor Street Project	1,420,159
Additional Costs Related to Public Housing Rent Collection Efforts	125,012
Elan Gardens Apartment Acquisition	4,000,000
Total	**$ 18,821,568**

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. **Resident Services (CDI) and MTW Initiatives**

The Organization uses Moving to Work funds to support the Community Development Initiatives Department for implementation of comprehensive resident service programs. MTW funds allow the Organization to expand outreach, identify best practices, grow services, and implement innovations based on resident's needs.

Comprehensive resident services include the following:

- Resident Outreach
- Service Coordination
- Resident Engagement Services
- Resident Leadership: Resident Council Training and Coordination and Resident Advisory Board
- Youth Services
- Community-Building Events and Additional Resident Activities
- Opportunity Home Grant Management
- Choice Endowment Trust
- ConnectHomeSA Digital Inclusion Program
- Support of HUD-Funded Programs
    - Family Self-Sufficiency Program
    - Resident Opportunities and Self-Sufficiency (ROSS) Grant Program
    - Elderly & Disabled Services (EDS) Program
    - Jobs Plus at Lincoln Heights Grant Program

Description of specific examples of uses of MTW funds

- Enhanced Resident Leadership: Enhance existing resident leadership efforts including support and coordination of Public Housing residents in forming and running resident councils.
- Food Distributions: Continue to assist with food distributions for the Organization's residents in an effort to address food insecurity.
- Resident Employment Programs: Support the Digital and Community Ambassador 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: Support access to opportunities aimed at bridging the digital divide through training, and digital devices.
- Youth Programming: Serve the Organization's youth through educational initiatives.

SUMMARY:
The CDI department (formerly known as Resident Services) is largely focused on fulfilling Opportunity Home's resident services, which is set 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. Below is a summary of the department's significant accomplishments and activities from July 1, 2024, to June 30, 2025.

Table 1. Summary of CDI Accomplishments from July 1, 2024 to June 30, 2025

Objective	Accomplishment
1. Improve the quality of life of residents	CDI hosted and assisted 259 events for Public Housing and HCV residents and 819 for elderly and disabled residents, totaling 1,078 events; 703 events were hosted by partners
	4 active resident councils
2 Provide access to resources and non-Opportunity Home programs	1,406 food distribution events with 25,056 total units served with an in-kind value of $1,776,662.53
	5,302 ROSS, FSS, and JP referrals for services made, averaging 1,325 referrals per quarter
	Continued Partnership with the Nancy Smith Hurd Foundation and AARP Community Challenge Grant to complete 14 computer labs at PH Family/EDS properties
3 Improve resident capacity	10 Resident Council recruitment sessions 2 Training sessions for Resident Council participants
	270 Distributed Devices: 267 laptops, 3 monitors and accessories 588 Digital Literacy Enrollments 1,973 Digital Literacy Lecture Hours
4 Facilitate residents achieving self-sufficiency	1,278 residents were enrolled in FSS during the fiscal year 43 residents graduated from the FSS program, earning a total of $569,576.27 of escrow funds
	1,227 children received school supplies
	36 Resident Scholarships awarded totaling $45,750 5 Joshua Longoria Passion For Life Memorial Scholarships totaling $2,500

Objective	Accomplishment
	69 youths received REACH Awards totaling $2,570
	1,339 ROSS, FSS, and JP assessments completed and 388 ROSS/JP/FSS service plans created 96 ROSS, FSS, and JP participants enrolled in training and education
5 Improve agency performance	36 CDI staff members took the Motivational Interviewing training through Crisis and Trauma Resource Institute 6 CDI staff members took the NanMcKay FSS training and certification exam

CDI HOSTED EVENTS:
Between July 1, 2024, and June 30, 2025, the CDI department hosted 1,078 total events.

Table 2. CDI Hosted and Assisted Events from July 1, 2024 to June 30, 2025

Event Type	PH/HCV Family	Elderly/Disabled	Total
Arts	0	8	8
Community Building	36	268	304
Digital Inclusion/Literacy	25	107	132
Education	28	99	127
Employment	26	0	26
Financial Literacy	17	15	32
Health	23	202	225
Leadership	0	2	2
Nutrition	23	58	81
Other/Admin*	5	27	32
Parenting	5	0	5
Recruitment	59	32	91
Training	6	1	7
Youth Services	6	0	6
Grand Total	**259**	**819**	**1,078**

* 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, 2024 to June 30, 2025

Population Served	Type of Food Assistance	# of Events	# Units Served*	In-Kind Amount
Public	HOPE Commodities	181	6,194	$758,903.35

Housing	Commodity Supp. Food Program (CSFP)	182	4,877	$552,759.18
	HEAL (formerly COSA Lunches)	992	12,145	$69,705.18
	Other distributions (ROSS)	51	1,840	$395,294.82
Total		**1,406**	**25,056**	**$1,776,662.53**

*# 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.

REFERRALS FOR SERVICES:

From July 1, 2024 to June 30, 2025, CDI department's programs, Resident Opportunities and Self-Sufficiency (ROSS), Family Self-Sufficiency (FSS), and Jobs Plus (JP) programs made a total 5,302 referrals for services, averaging 1,325 referrals each quarter.

Table 4. Program Service Referrals by Category from July 1, 2024 to June 30, 2025

Referral Type	No. of Referrals	Total of In-Kind
Basic Needs Related Services	194	$120.00
Childcare Services	100	0
Digital Inclusion-Related Services	363	0
Education Related Services	708	$2,540.00
Employment Related Services	644	0
Financial Management Related Services	899	0
Food Services	750	$4,192.83
Health and Safety Related Services	121	$110.00
Housing or Utility Services	626	$3,873.94
Legal Services	41	0
Other*	754	$23,937.00
Transportation Services	22	$50.00
Youth Services	80	0
Total	**5,302**	**$34,823.77**

* 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.

Table 5. Program Service Referrals by Program from July 1, 2024 to June 30, 2025

Referral Type	No. of Referrals	Total of In-Kind
FSS	4,187	$24,013.74
Jobs Plus	319	$6,021.86
ROSS	796	$4,788.17

Total	**5,302**	**$34,823.77**

Services: A service is an aid or assistance provided directly to the resident by Opportunity Home staff. From July 1st to June 30th, FSS, Jobs Plus, and ROSS provided 2,398 services.

Table 6. Program Services by CDI program from July 1, 2024 to June 30, 2025

CDI Program		No. of Services
FSS		1179
Jobs Plus		608
ROSS		611
	Total	**2,398**

Table 7. Program Services by service category from July 1, 2024 to June 30, 2025

Services Type		No. of Services
Basic Needs Related Services		163
Childcare Services		27
Digital Inclusion-Related Services		140
Education Related Services		128
Employment Related Services		226
Financial Management Related Services		35
Food Services		572
Health and Safety Related Services		30
Housing or Utility Services		115
Legal Services		20
Other*		687
Transportation Services		68
Youth Services		187
	Total	**2,398**

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

2. **Lincoln Predevelopment Costs:** MTW funds were used to fund predevelopment costs at Lincoln Heights.
3. **Snowden Development Funding Gap:** MTW funds were used to cover financial gaps in the development and construction of Snowden, a senior living complex.
4. **Alazan Phase I and Predevelopment Costs:** MTW funds were used to fund predevelopment costs at Alazan.

5. **Investment in Midcrowne and Ravello Properties:** MTW funds were used to fund repairs at Midcrowne and Ravello.
6. **Investment in MTW Units at Tax Credit/Affordable Housing Communities (formerly Beacon) Properties:** MTW funds were used to acquire Alhambra and San Juan and pay off the debt at Converse Ranch 2.
7. **Additional Investment in the 100 Labor Street Project:** MTW funds were used to fund costs related to the construction of the 100 Labor Street Apartment.
8. **Additional Costs Related to Public Housing Rent Collection Efforts:** MTW funds were used to cover costs associated with rent collection efforts in the Public Housing portfolio.
9. **Elan Gardens Apartment Acquisition:** MTW funds were used to acquire Elan Gardens.

Section V. B. | 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 was not subject to any HUD reviews, audits or inspections that required PHA action during the Plan Year.

Section VI. B. | Evaluation Results

Opportunity Home is not currently engaged in any Organization-wide evaluations of its MTW program. The Strategy, Data and Innovation Department is currently reviewing all MTW activities to determine which activity(ies) should be included in the coming year's formal evaluations.
A small number of formal activity evaluations will be conducted each FY beginning FY25-26 after determining priority status.

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

Not Applicable.

APPENDIX A | Property Listing

Property Name	Portfolio	Status	MTW Detail	Total Units
100 Labor Downtown	Affordable Housing Communities	Active	MTW LNT	213
Bella Claire	Affordable Housing Communities	Active	MTW LNT	67
Burning Tree	Affordable Housing Communities	Active	Non-MTW	108
Castle Point	Affordable Housing Communities	Active	MTW LNT	220
Churchill Estates	Affordable Housing Communities	Active	MTW LNT	40
Claremont	Affordable Housing Communities	Active	MTW LNT	4
Converse Ranch I	Affordable Housing Communities	Active	MTW LIPH	124
Converse Ranch II	Affordable Housing Communities	Active	Non-MTW	104
Costa Valencia	Affordable Housing Communities	Active	MTW LNT	230
Cottage Creek I	Affordable Housing Communities	Active	Non-MTW	253
Cottage Creek II	Affordable Housing Communities	Active	Non-MTW	196
Courtland Heights	Affordable Housing Communities	Active	Non-MTW	56
Dietrich Road	Affordable Housing Communities	Active	Non-MTW	30
Encanta Villa	Affordable Housing Communities	Active	Non-MTW	56
Homestead	Affordable Housing Communities	Active	MTW LNT	157
La Providencia	Affordable Housing Communities	Active	MTW LNT	90
Legacy at Crown Meadows	Affordable Housing Communities	Active	MTW LNT	192

Property Name	Portfolio	Status	MTW Detail	Total Units
Legacy at Science Park	Affordable Housing Communities	Active	Non-MTW	120
Legacy on O'Connor	Affordable Housing Communities	Active	Non-MTW	150
Midcrown Seniors Pavillion	Affordable Housing Communities	Active	MTW LNT	196
Monterrey Park	Affordable Housing Communities	Active	MTW LNT	200
Pecan Hill	Affordable Housing Communities	Active	Non-MTW	100
Reagan West	Affordable Housing Communities	Active	Non-MTW	15
Refugio Place	Affordable Housing Communities	Active	MTW LIPH	210
Rosemont at Highland Park	Affordable Housing Communities	Active	MTW LNT, MTW MPBV	252
San Juan Square II	Affordable Housing Communities	Active	MTW LNT	144
Sunshine Plaza	Affordable Housing Communities	Active	Non-MTW	100
The Ravello	Affordable Housing Communities	Active	MTW LNT	252
Towering Oaks	Affordable Housing Communities	Active	MTW LNT	128
Villa de San Alfonso	Affordable Housing Communities	Active	MTW LNT	29
Villa de Valencia	Affordable Housing Communities	Active	Non-MTW	104
Warren House	Affordable Housing Communities	Active	MTW LNT	7
Woodhill	Affordable Housing Communities	Active	MTW LNT, MTW MPBV	532
Arroyo Seco Villas	Partnerships	Active	Non-MTW	200
Artisan at Creekside	Partnerships	Active	Non-MTW	252
Artisan at Mission Creek	Partnerships	Active	Non-MTW	252

Property Name	Portfolio	Status	MTW Detail	Total Units
Artisan at Ruiz	Partnerships	Active	Non-MTW	102
Aspire at Tampico	Partnerships	Active	MTW LNT	200
Bonito Parque	Partnerships	Active	Non-MTW	250
Bristol at Somerset	Partnerships	Active	MTW LNT	348
Costa Almadena	Partnerships	Active	MTW LIPH	176
Culebra Commons	Partnerships	Active	Non-MTW	327
East Meadows I	Partnerships	Active	MTW LNT, MTW MPBV	215
East Meadows II	Partnerships	Active	MTW LNT	119
Elan Gardens	Affordable Housing Communities	Active	MTW LNT	228
Elevate at Kitty Hawk	Partnerships	Active	Non-MTW	212
Frontera Crossing	Partnerships	Active	Non-MTW	348
Gardens at San Juan Square	Partnerships	Active	MTW LNT, MTW MPBV	252
HemisView Village	Partnerships	Active	MTW LIPH	245
Horizon Pointe	Partnerships	Active	Non-MTW	312
Legacy at Alazan	Partnerships	Active	MTW LNT	88
Majestic Ranch	Partnerships	Active	Non-MTW	288
Marshall Meadows	Partnerships	Active	Non-MTW	250
Mira Vista Ranch	Partnerships	Active	Non-MTW	312
Mission del Rio	Partnerships	Active	Non-MTW	180
Port Royal	Partnerships	Active	Non-MTW	252
Rosemont at University Park	Partnerships	Active	Non-MTW	240
San Juan Square I	Affordable Housing Communities	Active	MTW LNT	143
Seven07 Lofts	Partnerships	Active	Non-MTW	318
Sutton Oaks I	Partnerships	Active	MTW LIPH	194
The Alhambra	Affordable Housing Communities	Active	MTW LNT	140
The Arcadian	Partnerships	Active	Non-MTW	324

Property Name	Portfolio	Status	MTW Detail	Total Units
The Mirabella Senior Apts	Partnerships	Active	Non-MTW	172
The Park at Sutton Oaks	Partnerships	Active	MTW LNT	208
The Scott at Medio Creek	Partnerships	Active	Non-MTW	324
The Sorento	Partnerships	Active	Non-MTW	248
Vista at Everest	Partnerships	Active	Non-MTW	64
Vista at Interpark	Partnerships	Active	Non-MTW	64
Wheatley Park Senior Living	Partnerships	Active	MTW LIPH, MTW MPBV	80
Alazan Courts	Public Housing	Active	MTW LIPH	501
Apache Courts	Public Housing	Active	MTW LIPH	184
Blanco	Public Housing	Active	MTW LIPH	100
Cassiano Homes	Public Housing	Active	MTW LIPH	499
Cheryl West	Public Housing	Active	MTW LIPH	82
Christ the King	Public Housing	Active	MTW LIPH	48
Col. George Cisneros	Public Housing	Active	MTW LIPH	55
College Park	Public Housing	Active	MTW LIPH	78
Cross Creek	Public Housing	Active	MTW LIPH	66
Dr. Charles C. Andrews	Public Housing	Active	MTW LIPH	52
Escondida	Public Housing	Active	MTW LIPH	20
Fair Avenue	Public Housing	Active	MTW LIPH	216
Francis J. Furey	Public Housing	Active	MTW LIPH	66
Frank Hornsby	Public Housing	Active	MTW LIPH	59
Glen Park	Public Housing	Active	MTW LIPH	26
Guadalupe Subdivision	Public Housing	Active	MTW LIPH	56
Henry B. Gonzalez	Public Housing	Active	MTW LIPH	51
Highview	Public Housing	Active	MTW LIPH	68
Jewett Circle	Public Housing	Active	MTW LIPH	75
Kenwood Manor	Public Housing	Active	MTW LIPH	9
Kenwood North	Public Housing	Active	MTW LIPH	53
L.C. Rutledge	Public Housing	Active	MTW LIPH	66

Property Name	Portfolio	Status	MTW Detail	Total Units
Le Chalet	Public Housing	Active	MTW LIPH	34
Lewis Chatham	Public Housing	Active	MTW LIPH	119
Lila Cockrell	Public Housing	Active	MTW LIPH	70
Lincoln Heights	Public Housing	Active	MTW LIPH	338
Linda Lou	Public Housing	Active	MTW LIPH	10
Lofts at Marie McGuire	Public Housing	Active	MTW LIPH	63
Madonna	Public Housing	Active	MTW LIPH	60
Matt Garcia	Public Housing	Active	MTW LIPH	55
Mirasol Townhomes	Public Housing	Active	MTW LIPH	174
Mission Park	Public Housing	Active	MTW LIPH	100
Morris C. Beldon	Public Housing	Active	MTW LIPH	35
O.P. Schnabel	Public Housing	Active	MTW LIPH	70
Olive Park	Public Housing	Active	MTW LIPH	26
Park Square	Public Housing	Active	MTW LIPH	26
Park View	Public Housing	Active	MTW LIPH	153
Pin Oak I	Public Housing	Active	MTW LIPH	50
Pin Oak II	Public Housing	Active	MTW LIPH	22
Raymundo Rangel	Public Housing	Active	MTW LIPH	26
Riverside	Public Housing	Active	MTW LIPH	74
Sahara Ramsey	Public Housing	Active	MTW LIPH	16
San Pedro Arms	Public Housing	Active	MTW LIPH	16
South San	Public Housing	Active	MTW LIPH	30
Springview	Public Housing	Active	MTW LIPH	140
Springview Senior	Public Housing	Active	MTW LIPH	40
Sun Park Lane	Public Housing	Active	MTW LIPH	65
T.L. Shaley	Public Housing	Active	MTW LIPH	66
Tarry Towne	Public Housing	Active	MTW LIPH	98
The Midway	Public Housing	Active	MTW LIPH	20
Victoria Plaza	Public Housing	Active	MTW LIPH	185
Villa Hermosa	Public Housing	Active	MTW LIPH	66
Villa Tranchese	Public Housing	Active	MTW LIPH	201
Villa Veramendi	Public Housing	Active	MTW LIPH	166

Property Name	Portfolio	Status	MTW Detail	Total Units
Village East	Public Housing	Active	MTW LIPH	24
W.C. White	Public Housing	Active	MTW LIPH	75
Westway	Public Housing	Active	MTW LIPH	152
William R. Sinkin	Public Housing	Active	MTW LIPH	50
Williamsburg	Public Housing	Active	MTW LIPH	15
The Baltazar	Partnerships	Active	Non-MTW	60
Vista at Reed	Partnerships	Active	Non-MTW	56
Palo Alto	Partnerships	Active	Non-MTW	336
Potranco	Partnerships	Active	Non-MTW	360
Snowden Living	Partnerships	Active	MTW LNT	135
The Josephine	Partnerships	Active	Non-MTW	259
Vista at Silver Oaks	Partnerships	Active	Non-MTW	76
Victoria Commons North/South Pond	Affordable Housing Communities	Under Construction	Non-MTW	397
Riverbreeze	Partnerships	Under Construction	Non-MTW	264

APPENDIX B | Assisted Housing Programs

Opportunity Home San Antonio is committed to providing quality affordable housing that is well integrated into the fabric of neighborhoods and serves as a foundation to improve lives and advance resident independence.

The Assisted Housing Programs include the Housing Choice Voucher (HCV) Program, also known as the Section 8 Program, and Special Programs that target specific populations such as homeless persons or persons with disabilities.

MTW Programs

The Housing Choice Voucher (HCV) Program

The Housing Choice Voucher (HCV) Program provides eligible, low-income individuals and families with the ability to afford decent, safe and sanitary housing in the private market. Participants are free to choose rental housing from single-family homes, townhouses and apartments as long as the units meet the requirements of the program. This freedom of choice offers participants a chance for a better quality of life by providing them with access to better job opportunities, schools, transportation and other services. The HCV Program has an Annual Contributions Contract (ACC) of 13,360 vouchers and an MTW baseline of 12,460 vouchers.

Project-Based Voucher (PBV) Program

Opportunity Home administers 183 Project-Based Vouchers at various properties, which provide housing assistance to residents only at those properties. Opportunity Home PBVs may only be used to assist units and may not move with the resident. Up to 20% of Opportunity Home's authorized units will be utilized by project-based assistance.

The Homeless Services Voucher (HSV) Program

The Homeless Services Voucher (HSV) program provides rental voucher assistance to homeless individuals through a collaborative referral process. Haven for Hope refers applicants to the City of San Antonio, which then screens the applicants to ensure they have met all criteria and forwards the application packets to Opportunity Home. A total of 470 vouchers have been allocated for the HSV program. Case management and supportive services are provided by Haven for Hope.

The Set Aside Homeless Voucher (SHVP) Program

The Set Aside Homeless Voucher Program (SHVP) provides rental voucher assistance to homeless individuals through a collaborative referral process. Opportunity Home has allocated 75 vouchers to San Antonio Metropolitan Ministries (SAMMs) and 100 vouchers to the Center for Health Care Services (CHCS), which screen applicants to ensure they meet all eligibility criteria and then forward referral packets to Opportunity Home. A total of 175 vouchers have been allocated for the Set Aside Homeless Voucher Program (SHVP) program. Case management and supportive services are provided by CHCS and SAMMs.

THRU Project Program

The THRU Project Program allocates 10 project-based vouchers for youth aging out of the foster care system in support of local non-profit organization, THRU Project.

Move On Program

The Move On Program provides 40 tenant-based vouchers for families currently residing in Permanent Supportive Housing (PSH) who are certified as no longer requiring supportive services by a designated PSH provider currently partnered with Opportunity Home.

Family Homeless Program

The Family Homeless program is for families certified by a designated social service agency as homeless and referred to Opportunity Home social service agencies such as Haven for Hope, San Antonio Metropolitan Ministries and the Center for Health Care Services. A total of 73 Project-Based vouchers are allocated for this program.

The College and University Homeless Assistance Program

The College and University Homeless Assistance Program are set-aside voucher programs for homeless students attending any of the Alamo Community Colleges. A total of 100 set-aside vouchers are allotted for this program.

Non-Elderly Disabled Voucher Program (NED)

The Non-Elderly Disabled Voucher Program (NED) are set-aside vouchers that assist non-elderly disabled families in leasing affordable private housing. The program consists of 75 NED vouchers.

Stability Voucher Program

The Stability Voucher program is for individuals and families who are homeless, at-risk of homelessness, fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking, or were recently homeless or have a high risk of housing instability. Close to Home refers eligible families for assistance to Opportunity Home. The Agency was awarded 41 Stability Vouchers.

Emergency Housing Vouchers

Opportunity Home was awarded 284 Emergency Housing Vouchers to assist individuals and families who are experiencing homelessness; at risk of experiencing homelessness; fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking; or were recently homeless and for whom providing rental assistance will prevent the family's homelessness or having high risk of housing instability. Our agency partners with local Continuum of Care Lead Agency, Close to Home, to receive referrals and ensure supportive services are provided to applicants. Use of these vouchers is limited and they are not re-issued after the family no longer needs assistance or housing assistance is terminated.

Close to Home Referrals

Opportunity Home partners with Close to Home, the local Continuum of Care Lead Agency that coordinates referrals from several agencies across San Antonio. Through this collaborative partnership, Opportunity Home has allocated 250 tenant-based vouchers to individuals and families who are experiencing homelessness or housing instability.

Non-MTW Programs

The Organization has received HUD approval to extend MTW waivers to the following Non-MTW Programs: The Veterans Affairs Supportive Housing (VASH) Program, Mainstream Program, and Foster Youth to Independence (FYI) Voucher Program. (FY2014-6 HCV Rent Reform, FY 2019-1, Local Implementation of SAFMR, and FY 2019-2 Alternate Recertification Process). These programs are not included in MTW voucher reporting in this annual report.

The Veterans Affairs Supportive Housing (VASH) Program

The Veterans Affairs Supportive Housing (VASH) program for homeless veterans combines HCV rental assistance with case management and clinical services provided by the Department of Veterans Affairs (VA) at VA medical centers and community-based outreach clinics. Homeless veterans are screened by the VA and then referred to Opportunity Home. A total of 574 vouchers are allocated for this program.

Mainstream Program

Mainstream program vouchers enable income-eligible disabled families to lease affordable private housing. Applicant families with a disabled household member over the age of 18 qualify for the program. A total of 330 vouchers are allocated for this program.

Foster Youth to Independence (FYI) Voucher Program

The Foster Youth to Independence (FYI) program serves youth between the ages of 18 and 24 who have left or will leave foster care, those at risk of becoming homeless or who are homeless, and are aged 16 or older. The Organization has been awarded 25 FYI vouchers.

Moderate Rehabilitation (MOD-Rehab) Program

Through the MOD-Rehab program, rent subsidy payments are provided through certificates to private-property landlords for select rental units that have been rehabilitated under this Program.

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