SAHA
SAN ANTONIO
HOUSING AUTHORITY
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MOVING TO WORK

Annual Report | Fiscal Year 2017-2018

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MESSAGE FROM PRESIDENT AND CEO

The San Antonio Housing Authority's vision has long been to create dynamic communities where people thrive. Since receiving the Moving to Work (MTW) designation in 2009, SAHA has made significant progress in realizing its mission. The MTW designation has allowed SAHA the flexibility to transform operations, programs and housing by implementing innovative strategies.

This fiscal year alone, SAHA is estimating over $700,000 in cost savings accomplished across seven MTW activities aimed at creating administrative efficiencies, thereby reducing federal expenditures. The agency increased housing choices for low-income families by opening the second phase of the new East Meadows community, Wheatley Senior Park Living, located on the site of the former Wheatley Courts public housing development. The construction of Phase III has also commenced and is expected to be completed in the next fiscal year. What's more, we promoted self-sufficiency among residents by sustaining resident enrollment and engagement in self-sufficiency programs. Through our self-sufficiency programs, we served over 1,500 individuals, with 31 graduates and 45 percent of participants employed and the others involved in educational or job training activities. Sixty-four residents earned a high school diploma or certificate of high school equivalency.

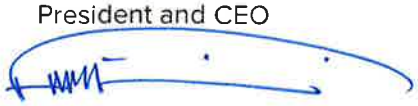
Our accomplishments as a high-performing agency go beyond our MTW achievements. In 2017, the National Association of Housing and Redevelopment Officials (NAHRO) recognized SAHA with 19 Awards of Merit — the most of any agency — and one Awards of Excellence nomination and one Awards of Excellence recipient.

We bolstered our efforts to improve resident offerings through effective and innovative partnerships. SAHA and our many partners are leading the effort to bridge the digital divide and increase digital literacy at SAHA communities through the ConnectHome program. This fiscal year, 650 residents completed ConnectHome Training -- 385 devices were distributed and 273 household connected.

As one of only 39 public housing authorities throughout the nation with the MTW designation, we are proud to lead in establishing best practices for both existing and prospective MTW agencies. We look forward to building on the success of our existing programs and aspire to improve customer service, combat homelessness, create more affordable units and develop new income business silos with public and private partners.

Thank you for your support of our vision to *Create Dynamic Communities Where People Thrive.* We hope you will enjoy learning more about our FY2018 accomplishments in this year's MTW Annual Report.

David Nisivoccia
President and CEO



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Vision

Create dynamic communities where people thrive.

Mission

Provide quality affordable housing that is well-integrated into the fabric of neighborhoods and serves as a foundation to improve lives and advance resident independence.

Strategic Goals

- Empower and equip families to improve their quality of life and achieve economic stability
- Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service
- Preserve and improve existing affordable housing resources and opportunities
- Strategically expand the supply of affordable housing
- Transform core operations to be a high performing and financially strong organization
- Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents

Moving to Work Goals

- Reduce cost and achieve greater cost effectiveness in Federal expenditures
- Give incentives that promote self-sufficiency
- Increase housing choices for low-income families in San Antonio

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Fiscal Year 2018: *July 1, 2017 to June 30, 2018*

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Charles Muñoz, Vice-Chairman
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Steve Morando, Director of Procurement and General Services
Lorraine Robles, Director of Development Services and Neighborhood Revitalization
Janie Rodriguez, Director of Human Resources
Thomas R. Roth, Director of Asset Management

MTW Staff

Richard L. Milk, Director of Policy and Planning
Sara Eaves, MTW & GIS Program Analyst

Table of Contents

MESSAGE FROM CEO 3
I. Introduction 6
II. General Housing Authority Operating Information 11
A. Housing Stock Information 11
B. Leasing Information 13
C. Waiting List Information 14
D. Information on Statutory Objectives and Requirements 15
III. Proposed MTW Activities 17
IV. Approved MTW Activities 18
A. Implemented Activities 18
FY2011-1e – Preservation and expansion of affordable housing 19
FY2011-9 – Allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who will provide supportive services to those households 22
FY2013-2 – Simplified Earned Income Disregard (S-EID) 24
FY2013-4 – HQS Inspection of SAHA-owned non-profits by SAHA inspectors 30
FY2014-2 – Early Engagement (previously referred to as Path to Self-Sufficiency) 32
FY2014-3 – Faster Implementation of Payment Standard Decreases (HCV) 35
FY2014-6 – Rent Simplification (HCV) 36
FY2015-1 – MDRC / HUD Rent Reform Study 41
FY2015-2 – Elderly Admissions Preference at Select Public Housing Sites 52
FY2015-3 – Modified Project Based Vouchers 55
FY2015-4 – Simplified Utility Allowance 58
FY2017-1 – Time Limited Working Referral Program / Thrive in Five 61
FY2017-2 – Restorative Housing Pilot Program 67
B. Activities on Hold 76
C. Closed Out Activities 77
V. Sources and Uses of Funds 81
A. Sources and Uses of MTW Funds 81
MTW Initiatives 82
B. Local Asset Management Plan 84
VI. Administrative 88
Certification of MTW Statutory Compliance 89

Overview

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

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

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

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

Short-term Accomplishments

Progress towards long-term goals and objectives

On June 25, 2012, the Board of Commissioners formally approved SAHA's new Strategic Plan. Three elements comprise the core of the plan: a new vision for the Agency, a new mission statement, and a set of six strategic goals.

Vision: Create dynamic communities where people thrive.

Mission: Provide quality affordable housing that is well-integrated into the fabric of neighborhoods and serves as a foundation to improve lives and advance resident independence.

Strategic Goals

1. Empower and equip families to improve their quality of life and achieve economic stability.
2. Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.
3. Preserve and improve existing affordable housing resources and opportunities.
4. Strategically expand the supply of affordable housing.
5. Transform core operations to be a high performing and financially strong organization.
6. Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.

SAHA's MTW Plan and Strategic Plan are closely integrated. The Strategic Plan goals articulate and reinforce the three statutory MTW goals.

Strategic Plan

SAHA's Strategic Plan establishes six long-term strategic goals to be achieved by 2020. In order to ensure timely progress towards those goals, SAHA develops annual Strategic Implementation Plans that set out annual objectives for the fiscal year. Progress is measured by tracking key metrics for each strategic goal. The first of the following tables lists the key metrics assigned to each strategic goal. The second table shows the relationship between the long term strategic goals and annual objectives.

Key Strategic Goal Metrics
Metrics in boldface are MTW Standard Metrics.

Strategic Goal	Metric	Definition
1: Empower and equip families to improve their quality of life and achieve economic stability.	Education Attainment	% of 19 and older adults with an education level of 12 or more; Level 12 indicating GED/HS Diploma
	Employment rate of residents / participants (FT equivalent)	% of work-able adults that are employed at or above minimum FTE work level
	Employment rate of residents / participants (PTE and FTE)	% of work-able adults that are employed at or above minimum PTE work level
	Earned income	Median earned income of SAHA-assisted adults working at a full-time equivalent
	SS #8: Self Sufficient	**Number of households transitioned to self-sufficiency.**
2: Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.	Performance Evaluations Completed on time, %	Percentage of complete and correct evaluations submitted to HR within 30 days of anniversary date (hire date or promotion date)
	Employee turnover rate	Number of employees that have left divided by the total number of employees (for the period)
	Training commitment	Ratio of dollar amount set aside for training in each department's budget (to include tuition reimbursement, professional certification activities) to dollar amount spent for training
	Time to Hire	Percent of applicants that receive a contingent offer within 60 days from job post closing
	Wellness programs	$ invested in SAHA wellness programs
3: Preserve and improve existing affordable housing resources and opportunities.	**Units of Housing Preserved**	**Number of housing units preserved by contract execution of funds that include (CFP, MTW, Operations, Insurance loss proceeds, replacement reserve funds, net proceeds from sale of non strategic assets and net loan proceeds from refinances (Beacon)).**

	Percent of contracts expended	Percentage of contracts expended based on approved and executed contracts for eligible capital repair/replacements projects (as defined above) for current fiscal year.
	Funds Obligated	Funds obligated, based on executed contracts of funds that include (CFP, MTW, Operations, Insurance loss proceeds, replacement reserve funds, net proceeds from sale of non strategic assets and net loan proceeds from refinances (Beacon))
	Offline units	Units that are uninhabitable due to significant repairs required
	Work order days closed within 2 days, %	Percentage of work orders closed out within 2 days
	Emergency Work Orders completed same day, %	Percentage of emergency work orders completed the same day of being ordered
4: Strategically expand the supply of affordable housing.	Units acquired or built (completed)	Total sum of all units acquired or built
	Per unit cost	Total funds expended on construction/acquisition projects divided by the total number of units.
	Additional vouchers secured	Number of new, competitive vouchers secured
	Voucher value	Dollar value of new vouchers secured
5: Transform core operations to be a high performing and financially strong organization.	Occupancy (%)	Percentage of units occupied
	Average HAP	Average Housing Assistance Payment per voucher
	HCV Scorecard	Scorecard score for Housing Choice Voucher program
	Non-Profit DSCR	Debt service coverage ratio for Beacon Communities
	MTW Baseline Compliance	**MTW households assisted using the MTW baseline methodology set forth in PIH-2013-02.**
	Net Operating Income (NOI)	Net Operating Income
	PHAS Score	PHAS score for Public Housing
6: Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.	Agency Awards/Recognition	Number of national, state, and local awards for agency programs
	Positive media coverage (%)	Number of positive/neutral hits divided by total (all) hits, by media outlet
	Policy wins (%)	Number of policies finalized in SAHA's favor divided by total number of policies engaged

Long-term MTW Plan

In January 2017, SAHA staff began developing the concept for a Long-term MTW Plan. Staff recognized the need for a long-term (multi-year) perspective in order to accomplish some of the more complex and impactful agency goals. The group also recognized the challenge of

maintaining focus and momentum over multiple budget cycles. A Long-term MTW Plan, then, should be designed to provide a multi-year framework (through 2022/23) to guide the coordinated implementation of agency priorities, and include the following elements:

- Objectives: List of accomplishments to complete by 2022/23
- Metrics: For each objective, measurements of progress
- Targets: For each metric, the value that indicates success
- Logic model: description of how Projects work together to accomplish long-term objectives
- Projects: description of individual work plans

SAHA anticipates that the first draft of this Plan will be included in the FY2020 MTW Plan.

MTW Advisory Committee and MTW Alliances

SAHA is exploring significant changes to the direction and structure of the MTW Advisory Committee. For many years, the MTW Advisory Committee -- made up of external stakeholders and key SAHA staff -- was focused on providing feedback on the MTW Plan. Starting in January 2018, the Committee has convened to discuss alternative roles for the group. One of the alternatives that has broad support is to reconstitute the Advisory Committee as a number of Alliances. Each Alliance would be organized around one of the MTW Statutory Objectives (listed above in the Introduction to this section). A Housing Choice Alliance, for example, would reach out to other agencies and organizations who share the goal of increasing housing choices for low-income families. Alliance members could then identify specific objectives and promising strategies, develop short- and long-term plans, and coordinate communications and fundraising as a group. Some, but not all, Advisory Committee members have experience working in an Alliance or similar structure. The new MTW Alliances started their work in July 2018.

Featured Success Stories

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

JESSICA

Jessica is a mother of three children who joined the Family Self-Sufficiency Program in 2012. She immediately began temporary assignments with staffing agencies as she completed her Individual Training and Service Plan toward full-time employment.

She was hired with the American Payroll Association in March 2014. She completed a Financial Literacy Course in March 2015 and obtained a Texas Education Agency Certificate of High School Equivalency in March 2016. Jessica’s accomplishments motivated her to increase her credit scores by 80 points and completed home buyer readiness courses.

Ms. Gonzalez became the owner of a 4-bedroom, 2-bathroom house in July 2016 and achieved her personal goal of providing a stable home for her family. She graduated from the program with an escrow disbursement of $9,624.10.

JOHN HENRY

John Henry was a Marine Corp. veteran, who was homeless and unemployed before he received housing assistance and joined the Family Self-Sufficiency Program in September 2014.

“Housing changed my life,” John Henry said.

In 2017, John Henry completed a resume and interview workshop, received financial coaching and worked toward improving his credit score. Within the same year, John Henry graduated from the program with an escrow disbursement of $10,534.75.

He obtained permanent full-time employment with Superior Food where he has now been employed for 6 years.

DAWANNA

Before Dawanna Williams joined the Family Self-Sufficiency Program, she had zero income, was unemployed and actively job searching.

Staff at FSS quickly helped her obtain part-time employment as a Direct Assistant with the R & K Group Home in 2010. She pursued medical training and became a certified Pharmacy Technician from Kaplan College in December 2011 and immediately gained employment at Walgreens where she remains today with company benefits. Her beginning salary started at $12,288.00 and is currently making $36,500.00 annually.

Dawanna graduated from the program with an escrow disbursement of $14,862.82 and is currently enrolled in the Registered Nursing Program at St. Philip’s College.

II. General Housing Authority Operating Information

A. Housing Stock Information

i. Actual New Project Based Vouchers

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

PROPERTY NAME	NUMBER OF VOUCHERS NEWLY PROJECT-BASED		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
Wheatley Park Senior Living	36	36	Leased/Issued	No	80 Unit Senior Development: Phase 2 of Wheatley Courts Redevelopment/Phase 3 of Choice Grant

36	36	**Planned/Actual Total Vouchers Newly Project-Based**

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.
** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

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

Not Applicable

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 HAP 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		STATUS AT END OF PLAN YEAR**	RAD?	DESCRIPTION OF PROJECT
	Planned*	Actual			
Gardens at San Juan	31	31	Leased/ Issued	No	Mixed-income Community
East Meadows	8	8	Leased/ Issued	No	Phase I of Wheatley Courts Redevelopment/Phase 2 of Choice Grant

39	39	Planned/Actual Total Vouchers Newly Project-Based

* Figures in the "Planned" column should match the corresponding Annual MTW Plan.
** Select "Status at the End of Plan Year" from: Committed, Leased/Issued

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

Not Applicable

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

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

ACTUAL OTHER CHANGES TO MTW HOUSING STOCK IN PLAN YEAR
● LIPH Victoria Plaza, 185 units - HUD Approved Comprehensive Rehab ● LIPH Wheatley Senior Park Living, 80 units - Added 40 LIPH units at new mixed-income site ● MTW Voucher - No changes

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

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

GENERAL DESCRIPTION OF ALL ACTUAL CAPITAL EXPENDITURES DURING THE PLAN YEAR

FISCAL YEAR 2018

Grant	Grant Amount	FYB Cummulative Expended	FYE Cummulative Expended	Expended During FY18
2015 CFP	$ 7,539,807.00	$ 4,757,493.12	$ 7,324,752.31	$ 2,567,259.19
2016 CFP	$ 7,805,380.00	$ 2,357,165.95	$ 6,454,456.83	$ 4,097,290.88
2017 CFP	$ 7,973,378.00	$ -	$ 894,652.56	$ 894,652.56
2018 CFP	$ 12,191,825.00	$ -	$ -	$ -
			TOTAL FY18	$ 7,559,202.63

	Description
Blanco	A/E - Structural Assessment
Charles Andrews	A/E - Various Studies, Observation, and Testing
Charles Andrews	Substantial Renovations - Site, Bldg., Site Improv.
Fair Avenue	A/E - Fire Sprinkler Project
Guadalupe 24 Gus Garcia	Burn Unit Reconstruction
W.C. White	A/E - Basement Distress Column
W.C. White	Drainage, Crawl Space & Screen Wall Repairs
H.B. Gonzalez	City of San Antonio Permit
H.B. Gonzalez	Structural & Foundation Repairs
Wheatley Park Senior Living	Development Activity
Lincoln Heights	Hail Damage Roof Replacement
Frank Hornsby	Hail Damage Roof Replacement
Victoria Plaza	A/E - Various Architectural Services, Study & Design
Villa Tranchese	A/E - Various Asbestos Inspections & Consulting (HVAC Chiller, Fire Sprinkler & Alarm Design)
Fair Avenue	A/E - Fire Sprinkler & Alarm Design
Escondida	Hail Damage Roof Replacement
Le Chalet	Elevator Modernization

Cross Creek	Burn Unit #1503 Restoration
Westway	Site Improvements
Morris Beldon	Hail Damage Roof Replacement
Lila Cockrell	A/E - MEP Engineering Consulting
Lila Cockrell	Domestic Hot Water System Replacement
Tarry Towne	Hail Damage Roof Replacement
Francis Furey	Hail Damage Roof Replacement

B. Leasing Information

i. Actual Number of Households Served

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

NUMBER OF HOUSEHOLDS SERVED THROUGH:	NUMBER OF UNIT MONTHS OCCUPIED/LEASED*		NUMBER OF HOUSEHOLDS SERVED**	
	Planned^^	Actual	Planned^^	Actual
MTW Public Housing Units Leased	72,516	67,554	6,043	5,630
MTW Housing Choice Vouchers (HCV) Utilized	145,608	144,230	12,134	12,019
Local, Non-Traditional: Tenant-Based	NA	NA	NA	NA
Local, Non-Traditional: Property-Based	2,052	2,041	171	170
Local, Non-Traditional: Homeownership	NA	NA	NA	NA
Planned/Actual Totals	220,176	213,825	18,348	17,819

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

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

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

Please describe differences between the Planned and Actual Households Served:

The agency completed the relocation of residents living at Victoria Plaza (185 units) to prepare for a comprehensive modernization.

LOCAL, NON-TRADITIONAL CATEGORY	MTW ACTIVITY NAME/NUMBER	NUMBER OF UNIT MONTHS OCCUPIED/LEASED*		NUMBER OF HOUSEHOLDS TO BE SERVED*	
		Planned^^	Actual	Planned^^	Actual
Tenant-Based	NA	NA	NA	NA	NA
Property-Based	FY2011-1e Preservation and Expansion of Affordable Housing	2,052	2,041	171	170
Homeownership	NA	NA	NA	NA	NA

Planned/Actual Totals	2,052	2,041	171	170

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

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

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

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

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

HOUSING PROGRAM	DESCRIPTION OF ACTUAL LEASING ISSUES AND SOLUTIONS
MTW Public Housing	SAHA continues to have a high number of evictions for various violations within the program. SAHA will ensure the waiting list is monitored on a continual basis and applicants are selected timely to fill the vacant units. Internal processes and procedures have been refined to create a more streamlined eligibility process once the applicants are selected off of the waiting list.
MTW Housing Choice Voucher	The San Antonio market has proven to be challenging for applicants to find housing. There is a high demand for rental housing and few landlords are accepting vouchers. It is additionally difficult for applicants with criminal backgrounds and poor credit history. As such, SAHA is working in partnership with the San Antonio Board of Realtors and National Association of Real Estate Property Management to recruit and train new landlords to participate in the HCV program. SAHA has also implemented a "second chance" landlord listing to assist residents with challenging histories in finding housing.
Local, Non-Traditional	None.

C. Waiting List Information

i. Actual Waiting List Information

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

WAITING LIST NAME	DESCRIPTION	NUMBER OF HOUSEHOLDS ON WAITING LIST	WAITING LIST OPEN, PARTIALLY OPEN OR CLOSED	WAS THE WAITING LIST OPENED DURING THE PLAN YEAR
Federal MTW Public Housing Units	Site-based	20,427	Open	No
Federal MTW Housing Choice Voucher Program	Community-wide	20,194	Closed	No

Federal Non-MTW Housing Choice Voucher Program: Moderate Rehabilitation	Moderate Rehabilitation	30,516	Open	No
Project-based Local (Gardens at San Juan Square)	Local Project-Based	28,577	Open	No
Project-based Local (East Meadows Phase I)	Local Project-Based	11,238	Open	No
Project-based Local (Wheatley Park Senior Living)	Local Project-Based	77	Open	Yes

Please describe any duplication of applicants across waiting lists:

Currently the total number of households on the waiting lists is 49,491 with average household applying for 2 or more waiting lists.

ii. Actual Changes to Waiting List in the Plan Year

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

WAITING LIST NAME	DESCRIPTION OF ACTUAL CHANGES TO WAITING LIST
Federal MTW Public Housing Units	None
Federal MTW Housing Choice Voucher Program	Closed on July 7, 2017
Federal Non-MTW Housing Choice Voucher Program: Moderate Rehabilitation	None
Project-based Local (Gardens at San Juan Square)	None
Project-based Local (East Meadows Phase I)	None
Wheatley Park Senior Living PBV	Opened September 2017

D. Information on Statutory Objectives and Requirements

i. 75% of Families Assisted Are Very Low Income

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

INCOME LEVEL	NUMBER OF LOCAL, NON-TRADITIONAL HOUSEHOLDS ADMITTED IN THE PLAN YEAR
80%-50% Area Median Income	88
49%-30% Area Median Income	37
Below 30% Area Median Income	9

Total Local, Non-Traditional Households Admitted	134

ii. Maintain Comparable Mix

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

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

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

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

There are no non-MTW Adjustments to the distribution of household sizes. Baseline percentages of household sizes to be maintained were established using the most complete historical dataset that included household size. The reported data in the Agency's FY2011-2012 report for FY2011-1 Activity was used to set the baseline-- this is a snapshot of occupancy as of June 30, 2012. It is important to note that this form uses the term "Family Size". SAHA does not define nor track families; rather, the Agency tracks households and household size.

MIX OF FAMILY SIZES SERVED (in Plan Year)				
FAMILY SIZE	BASELINE MIX PERCENTAGE**	NUMBER OF HOUSEHOLDS SERVED IN PLAN YEAR^	PERCENTAGE OF HOUSEHOLDS SERVED IN PLAN YEAR^^	PERCENTAGE CHANGE FROM BASELINE YEAR TO CURRENT PLAN YEAR
1 Person	36%	6,791	38%	2%
2 Person	16%	3,198	18%	2%
3 Person	18%	2,920	16%	-2%
4 Person	15%	2,431	14%	-1%
5 Person	9%	1,448	8%	-1%
6+ Person	7%	1,073	6%	-1%
TOTAL	100%	17,861	100%	0

** 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:

Not Applicable.

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

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

MTW ACTIVITY NAME/NUMBER	NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY*	MTW PHA LOCAL DEFINITION OF SELF SUFFICIENCY
FY2013-2: Simplified Earned Income Disregard	1	PH household who is paying a flat rent for at least 6 months or a HCV household utilizing a zero HAP voucher for at least 6 months.
FY2014-6: Rent Simplification	28	
FY2015-1 MDRC/HUD Rent Study	0	
FY2017-1 Time Limited Working Referral Program	0	
FY2017-1 Restorative Housing Pilot Program	0	
FY14-4 Biennial Recertifications	65	
	28	*(Households Duplicated Across MTW Activities)*
	66	**Total Households Transitioned to Self Sufficiency**

III. Proposed MTW Activities

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

IV. Approved MTW Activities

A. Implemented Activities

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

i. Plan Year Approved, Implemented, Amended
Specify the Plan Year the MTW activity was proposed. Specify the Plan Year the MTW activity was implemented. Provide any Plan Years in which the MTW activity was amended.

ii. Description/Impact/Update/Rent Reform Hardships
Provides a description of the MTW activity and detailed information on its impact during the Plan Year. Provides the applicable Standard HUD Metrics tables with numerical information for baselines, benchmarks and outcomes for the Plan Year. Describes how outcomes compared to baselines and benchmarks. Indicates whether the MTW activity is on schedule.
NOTE: For rent reform/public housing term limit activities, a description of the number and results of any hardship requests and details regarding the required "Annual Reevaluation" that the MTW PHA put in place when proposing the MTW activity.

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

iv. Actual Changes to Metrics/Data Collection
Indicate if the MTW PHA made the planned changes or modifications to the metrics given in the Annual MTW Plan in the Plan Year. Indicate any unplanned changes or modifications to the metrics the MTW PHA made in the Plan Year (or state that there were none).

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

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

FY2011-1e – Preservation and expansion of affordable housing

MTW Statutory Objective(s): Increase Housing Choices

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

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

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

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

Plan Year Update

FY2014 Update: In FY2014, the Agency completed the Park at Sutton Oaks, a mixed-income community with 208 units, of which 162 are reserved for households with income at or below 80% AMI and 113 are non-Section 8/9. This community is also Phase I of the Choice Neighborhood Initiative.

FY2015 Update: In FY2015, the Agency completed the Gardens at San Juan Square, a mixed-income community with 252 units, of which 63 units are Section 9 (Public Housing), 31 units are Section 8 (Project-Based Vouchers), and 158 affordable and non-Section 8/9 (Tax-Credit

and HOME units). This community is 100% reserved for households with income at or below 80% AMI.

FY2016 Update: The Agency originally planned to add 44 affordable, non-Section 8/9 (Tax-Credit and HOME units) units as part of the Wheatley Choice Neighborhood Initiative Phase 2. While construction started in July 2015, these units are not scheduled to be available until August 2016 at the earliest. These units will be reported in FY2017.

Over the last 3 years, the Agency has replaced a total of 364 substandard public housing units (116 units at San Juan Homes and 248 units at Wheatley Courts) with 460 new units at the Park at Sutton Oaks (208 units) and Gardens at San Juan Square (252 units). Ninety percent of these new units or 414 remain affordable to households with an income at or below 80% AMI. Of the 414 affordable units, 271 are non-Section 8/9.

FY2017 Update: At fiscal year end, SAHA had completed 95% of East Meadows (Choice Phase II, formerly known as Wheatley Courts). The new development is a 9% Low Income Tax Credit project with a total of 215 new units -- 59 market units, 77 tax-credit only units, 71 public housing units layered with tax-credits, and 8 project-based vouchers. As a result, the agency added 77 new affordable units under this activity.

FY2018 Update: At fiscal year end, SAHA had completed Wheatley Senior Park Living (Choice Phase III, formerly known as Wheatley Courts). The new development is a 9% Low Income Tax Credit project with a total of 80 new units -- 0 market units, 4 tax-credit only units, 40 public housing units layered with tax-credits, and 36 project-based vouchers layered with tax-credits. As a result, the agency added 4 new affordable units under this activity.

The tables below compare the baselines and benchmarks for each metric. As indicated in the table, the Agency has met the fiscal benchmark as well as the five-year benchmark.

HUD Standard metrics

<table>
<tr><th colspan="5">HC #1: Additional Units of Housing Made Available</th></tr>
<tr><th>Unit of Measurement</th><th>Baseline</th><th>Benchmark</th><th>Outcome</th><th>Benchmark Achieved?</th></tr>
<tr><td rowspan="2">Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.</td><td>Housing units of this type prior to implementation of the activity (number). This number may be zero.</td><td>Expected housing units of this type after implementation of the activity (number).</td><td>Actual housing units of this type after implementation of the activity (number).</td><td rowspan="2">Benchmark met.</td></tr>
<tr><td>0</td><td>FY2014: 113
FY2015: 158
FY2016: 0
FY2017: 77
FY2018: 4
5 Year Target: 352</td><td>FY2014: 113
FY2015: 158
FY2016: 0
FY2017: 77
FY2018: 4
Cumulative: 352</td></tr>
<tr><th colspan="5">HC #2: Units of Housing Preserved</th></tr>
</table>

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity (number).	Expected housing units preserved after implementation of the activity (number).	Actual housing units preserved after implementation of the activity (number).	Benchmark met.
	0	0	0	

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi.Challenges in Achieving Benchmarks and Possible Strategies: Mixed-finance developments are very challenging to complete in the current funding environment. SAHA has utilized multiple funding sources in the past, including: tax credits, HOME funds, and other state and local funding. Recent changes to the Texas Department of Housing and Community Affairs Qualified Allocation Plan (QAP), which administers housing tax-credits, continue to prove challenging for the Agency. Under the recent QAP, opportunity neighborhood parameters are making it difficult to be awarded tax credits for projects located in areas where the Agency is engaged with the community on place-based revitalization. The Agency continues to advocate at the state level for tax-credits in neighborhoods that are the focus of place-based initiatives.

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

MTW Statutory Objective(s): Increase Housing Choices

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

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

Plan Year Update

At the end of the fiscal year, 155 households were utilizing a set-aside voucher and 57% remained housed for at least 2 years.

The tables below compare the baselines and benchmarks for each metric. As indicated in the table, the Agency continues to work with referring partners to increase utilization and facilitate stable housing.

HUD Standard Metrics

HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected number of households receiving these services after implementation of the activity (number).	Actual number of households receiving these services after implementation of the activity (number).	Benchmark met. SAHA continues to request referrals from partners to increase utilization for this program.
	0	up to 200	152	

SAHA Metrics

Maintain Households Served				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Percentage of households served that continue to be housed after 2 years	0	90%	44%	Benchmark not met..
Percentage of households served that continue to be housed after 1 years	0	90%	57%	Benchmark not met.

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: SAHA continues to work with partners to provide housing to populations facing homelessness. Benchmarks for the percentage of households served after 1 and 2 years continue to not meet benchmarks. The Agency has formed a Housing Choice Alliance with membership from different stakeholders including the partners participating in this activity and will explore additional ways to support the population served by the set-aside program.

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

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

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

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

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

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

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

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

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

Plan Year Update

At the end of the fiscal year, 125 households were utilizing the simplified earned income disregard. The Agency continues to use the S-EID as a financial incentive for the Jobs-Plus Grant Program that is expected to run until the end of calendar year 2019. .

The tables above compare the baselines and benchmarks for each metric. The activity is not meeting the benchmark for employment; however, the current target of 100% employed is a stretch target and the Agency has seen a slight increase since last year in the percentage of SEID households are were actively employed at the end of the fiscal year. All other outcomes have met the benchmarks..

HUD Standard Metrics

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$11,000	$12,100	Working Households:$18,541 Total Households: $13,350	Benchmark met.
SS #3: Increase in Positive Outcomes in Employment Status				
Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number).	Actual head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	117	85	Benchmark not met.
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Actual percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.

	of activity (percent). This number may be zero.			
	0	100%	73% 85 out of 117 work-able households (Non-Elderly and Non-Disabled Heads/Co-Heads/Spouses)	Benchmark not met.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	0	2	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	up to 200	125	Benchmark met.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The	Households transitioned to self-sufficiency (Number of households	Expected households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months)	Actual households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6	Whether the outcome meets or exceeds the benchmark.

PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero.	after implementation of the activity (number).	months) after implementation of the activity (number).	
	0	0	1	Benchmark met.
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$4,178 (200 HOURS * $25.89)	$4,178 (200 HOURS * $25.89)	$3,236 (125 HOURS * $25.89)	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.

	200	200	125	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	13.22	10.62 (3% decrease)	4.3	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$130,284	$130,284	$254,328	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements

				only. Neutral benchmark (no change expected) has been set.

SAHA Metrics

Number of Household Members who take advantage of disregard (average)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of Household Members who take advantage of disregard (average)	1	1.5	1.1	Benchmark not met.

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: In general, this activity is working well even though some benchmarks were not met. Because this activity directly supports the Agency's Jobs-Plus Grant program, the number of households has varied since implementation. When the activity first began, the Agency had a Jobs-Plus Grant at one of the largest properties on the west side of the city. That grant is now closed and the Agency has a new Jobs Plus Grant as part of its Choice Neighborhood efforts. In addition, the Agency is running a separate EID at a separate site as part of the HUD Jobs Plus Program.

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

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

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

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

Plan Year Update

This activity is on track. Since implementation, the Agency has saved an estimated $550,000.

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

HUD Standard Metrics

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark
	4,067 inspections * $42.90 = $174,474	4,067 inspections * $35.06 = $142,589	4,067 inspections * $35.06= $142,589	Benchmark was met. Savings= $31,885.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	0 hours	4,067 inspections x .5 hours = 2,034 hours	4,067 inspections x .5 hours = 2,034 hours	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change

				expected) has been set.

iii. Actual Non-Significant Changes: None.

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

Per Inspection Costs

Metric	**Baseline**	**Benchmark**	**Savings**
CE #1: Agency Cost Savings	Per Inspection FY13-15: $76.32 FY16-18: $42.90	Per Inspection FY13-15: $20.86 FY16-18: $35.06	Per Inspection FY13-15: $55.46 FY16-18: $7.84

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: SAHA will continue to monitor the cost savings to ensure the inspection cost remains below third-party cost levels and the number of inspections continues to be effectively absorbed by current staffing levels.

FY2014-2 – Early Engagement (previously referred to as Path to Self-Sufficiency)

MTW Statutory Objective(s): Increase Housing Choices

i. Plan Year Approved, Implemented, Amended This activity was approved in FY2013 and implemented in January 2014

ii. Description/Impact/Update/Rent Reform Hardships: This activity is designed to increase housing choices by providing training to support successful participation in SAHA's assisted housing programs, and was originally approved as part of the FY2013-2014 MTW Plan and implemented in that fiscal year.

The Early Engagement Program (EEP), is an enhanced orientation for incoming residents that provides training to support successful participation in SAHA's assisted housing programs. All incoming residents are required to attend an EEP orientation as part of the housing process. The premise of EEP is to engage, educate, and proactively link incoming residents to needed services in the community before they are housed.

The Community Development Initiatives (CDI) Department created the concept of Early Engagement as a result of communication from SAHA staff. Staff determined that many of the challenges that current and incoming residents experienced are: new residents are ill-informed on SAHA policies, a high volume of eviction interventions and uncollected rent takes place, a large percentage of delinquencies is common, and crisis situations, such as hoarding and the inability to pay rent and utility bills. This resulted in many residents, who had been on waiting lists for up to seven years, becoming evicted soon after moving into our subsidized housing communities. The EEP curriculum addresses these issues directly to help empower our residents to become informed and responsible renters.

Engage: Orientations are held monthly or /bi-monthly at the Girl Scouts Leadership Center and at Alamo College's Westside Education Training Center. The orientation format was developed to ensure optimal participation and engagement of attendees. Incoming residents are provided a letter with a date for the orientation. At registration, each resident is given a folder with a Self Sufficiency Assessment, punch card, resource material from partners, and a pen and paper for notes. Residents are given a name tag with color dot; dot color determines which group the resident will be a part of during the orientation and which group leader will guide them to all sessions. All residents are provided a light continental breakfast in the morning and snacks during the Resource Fair.

Each orientation begins with a general session that includes a welcome message from SAHA's executive team and a "Recipe for Success" presentation. This session sets the tone for the day and includes a message from SAHA's President and CEO and testimonials from former and current housing residents. Attendees are provided with an overview for the day and are assigned to a small group (<50) that will travel together to five concurrent sessions. Curriculum consists of four topics and a Resource Fair conducted concurrently for 30 minutes.

Educate: Topics for concurrent sessions include: Safety and Security, Financial Literacy, Tenant's Rights, and Housekeeping. Sessions are conducted by presenters from the following partnering community agencies: Safety and Security (SAHA Security), Financial Literacy (City of San Antonio Financial Empowerment Center), Tenant's Rights (St. Mary's School of Law), Housekeeping (City of San Antonio Code Compliance).

Each session follows a curriculum jointly created by SAHA staff and community experts. The goal of each session is to provide attendees with the foundation required to become a "successful renter". At the end of each session, residents complete an evaluation and a copy of the evaluation is given to each presenter.

Proactively link to services: When residents attend the Resource Fair, they are instructed to utilize the punch card that is in their folder and have it punched by a minimum of 10 agencies. Agencies/Partners in attendance at the Resource Fair include those providing the following services: employment, job training, education, child care, voter registration, self-sufficiency programs, financial institutions, etc.

Attendees who attend all sessions, complete a Self Sufficiency Assessment, and submit a completed Resource Fair participation punch card are awarded a Certificate of Completion and are escorted to the final phase of the orientation: obtaining a voucher (for HCV applicants) or list of public housing properties (for Public Housing applicants).

Plan Year Update

This activity is on track. Since implementation, over 7,500 households have successfully completed the series of courses.

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

HUD Standard Metrics

HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected number of households receiving these services after implementation of the activity (number).	Actual number of households receiving these services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	480	FY2014: 1,035 FY2015: 1,482 FY2016: 1,587 FY2017: 1,521 FY2018: 1,969	Benchmark met

SAHA Metrics

Negative Program Exit Rates

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Percent of households who attended the program and subsequently exited the housing program for a negative reason (PH + HCV)	39%	TBD	39% (168+50)/(508+57)	Benchmark met

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: The Agency is changing the way it will report on Negative Exits. In the past, the metric population was all SAHA residents whether they attended the program or not. Once the Agency was able to establish an internal process to track households in the data system, the Agency was able to develop internal reports. As a result, the metric has been updated to report on the rate of negative exits for residents who attend the program. Because this is a mandatory program, the goal is to decrease this rate over time. The baseline has been established using the FY2018 outcome and the benchmark will be established in FY2019 and reporting on in the next report.

v. Actual Significant Changes: None.

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

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

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

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

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

Plan Year Update

The FMRs increased in FY2018; therefore, this waiver was not utilized during the fiscal year. In addition, the Agency has received a waiver in the FY2019 MTW Plan to implement a local small area fair market activity. The Agency will be re-evaluating this activity to determine whether it should be closed out or combined with the new FY2019-1 Local Implementation of SAFMRs.

HUD Standard Metrics

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

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

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

FY2014-6 – Rent Simplification (HCV)

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

i. Plan Year Approved, Implemented, Amended: This activity was approved in FY2014 and implemented in July 2015.

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

Plan Year Update

This activity is on track.

Hardships: There has been no hardship requests associated with this activity this fiscal year.

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

HUD Standard Metrics

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark
	Average Staff Salary * 1 hours * # of households processed	Average Staff Salary * .25 hours * # of households processed	Average Staff Salary * .25 hours * # of households processed	Benchmark met
	$25.58 * 1 * 7,692 = $196,761	$25.58 * .25 *7,692= $49,190	$25.58 * .25 *7,692= $49,190	
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	1 hour * # Households on Rent Simplification	.25 hours * # Households on Rent Simplification	.25 hours * # Households on Rent Simplification	Benchmark met
	7,692	1,923	1,923	
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	11%	5%	5%	Benchmark met
CE #5: Increase in Agency Rental Revenue (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase). (Defined as Average Tenant Rent to Owner)	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$254.24	$254.24	$232.74	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #1: Increase in Household Income(HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.

	the activity (in dollars).			
	$4,168	$4,168	$5,237	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #3: Increase in Positive Outcomes in Employment Status (HCV)				
Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
(6) Other (Heads with any Earned Income)	Number of total households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected number of total households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity.	Actual number of total households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
	1,102	1,102	2,591	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
(6) Other (Heads with any Earned Income)	Percentage of total households in (6) Other (defined as head(s) of	Expected percentage of total households in (6) Other (defined as head(s) of households with earned income)	Actual percentage of total households in (6) Other (defined as head(s) of households with earned income)	Whether the outcome meets or exceeds the benchmark.

	households with earned income) prior to implementation of activity (percent). This number may be zero.	after implementation of the activity (percent).	after implementation of the activity (percent).	
	29%	29%	34%	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	47	47	103	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #8: Households Transitioned to Self Sufficiency (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA	Households transitioned to self-sufficiency (Number of	Expected households transitioned to self-sufficiency (Number of households	Actual households transitioned to self-sufficiency (Number of	Whether the outcome meets or

may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	households paying full contract rent (no subsidy) for at least 6 months) prior to implementation of the activity (number). This number may be zero.	paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).	households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).	exceeds the benchmark.
	0	0	28	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: Baseline and Benchmark calculations are updated every year with the current fiscal year average salary and benefits. CE#5 Baseline and Benchmarks were corrected to reflect the average tenant rent to owner at fiscal year end instead of the sum of internal quarterly reports. The listed definition was corrected to match the actual internal tracking definition-- changing it from Sum of HAP expense to Average Tenant Rent to Owner.

v. Actual Significant Changes: None.

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

FY2015-1 – MDRC / HUD Rent Reform Study

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

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

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

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

The Study Selection and Target Population Include:

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

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

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

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

Plan Year Update

The tables below compare the baselines and benchmarks for each metric. For CE#1 Cost Savings and CE#2 Time Savings, the benchmarks have generally been met. The Agency is still saving due to the cost per annual and the triennial schedule. The study group households are beginning to have their first triennial recertification. In March 2018, staff began processing annuals for those study group households who have a scheduled triennial recertifications in June 2018.

Hardships: There were a total of 62 hardships received during the fiscal year. At fiscal year-end, 41 had been approved, 20 denied, and 1 was still under review. Most of the hardship requests were the result of loss of income.

HUD Standard Metrics

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

				exceeds the benchmark.
Cost per Annual Certification	FY2016: $13,649 FY2017: $15,084 FY2018: $16,539 Year 1-3 Cost: $45,273 to annually recertify 779 Study Group Households FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Baseline Time.0.83 hours per cert ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Annuals Completed: 779 enrolled in study group	FY2016: $6,413 FY2017: $1,929 FY2018: $5,347 Year 1-3 Cost: $13,690 to certify Study Group Households Year 1-3 Savings: $31,583 ($45,273-$13,690) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Benchmark Time:0.39 hours per cert ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Annuals Completed	FY2016: $6,413 (779 Study Group annuals) *[Previously reported in error using 1,660 annuals which included borth study and control groups]* FY2017: $1,929 (212 Study Group annuals) FY2018: $5,347 (536 Study Group annuals) Year 1-3 Cost: $13,690 to certify Study Group Households Year 1-3 Savings: $31,583 ($45,273-$13,690) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Benchmark Time: 0.39 hours per cert ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Annuals Completed	Benchmark met
Cost per Interim Certification	FY2016: $6,907 FY2017: $7,633 FY2018: $8,369 Year 1-3 Cost: $22,909 for 779 Study Group Households FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Baseline Time: 0.42 hours per interim ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Interims Completed: 779 enrolled in study group	FY2016: $3,124 FY2017: $3,453 FY2018: $3,786 Year 1-3 Cost: $10,364 for 779 Study Group Households Year 1-3 Savings: $12,545 ($22,909-$10,364) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Baseline Time: 0.19 hours per interim ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Interims Completed	FY2016: $0 (0 Interims) FY2017: $1,436 (324 Interims) FY2018: $2,041 (420 Interims) Year 1-3 Cost: $3,477 for Study Group Households Year 1-3 Savings: $19,432 ($22,909-$3,477) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Benchmark Time: 0.19 hours per interim ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Interims Completed	Benchmark met

Cost of Rent Calculation	FY2016: $5,427 FY2017: $8,492 FY2018: $10,121 Year 1-3 Cost: $24,040 for 779 Study Group Households FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Baseline Time: 0.33 hours per calculation ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Calculations Completed: 779 enrolled in study group	FY2016: $2,138 FY2017: $983 FY2018: $1,397 Year 1-3 Cost: $4,517 for 779 Study Group Households Year 1-3 Savings: $19,523 ($24,040-$4,517) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Baseline Time: 0.13 hours per calculation ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Calculations Completed	FY2016: $2,138 (779 Calculations) FY2017: $1,626 (536 Calculations) FY2018: $3,179 (956 Calculations) Year 1-3 Cost: $4,540 for Study Group Households Year 1-3 Savings: $17,097 ($18,000-$4,517) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ____ ● Baseline Time: 0.13 hours per calculation ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Calculations Completed	Benchmark met
Cost to Determine Income from Assets	FY2016:$21 FY2017:$23 FY2018:$25 Year 1-3 Cost: $68 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ___ ● Baseline Time to determine Income from Assets: 1.27 hours ● Times average staff wage: $21.95 ● TImes number of Calculations Completed: Of the 779 enrolled in study group .38% will need asset calculations per traditional policy	FY2016:$3 FY2017:$3 FY2018: $3 Year 1-3 Cost:$9 Year 1-3 Savings: $59 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ___ ● Benchmark Time to determine Income from Assets: 0.17 hours ● Times average staff wage: $21.95 ● TImes number of Calculations Completed: Of the study group, the number with assets above $25,000	FY2016: $0 (0 determinations) *[Previously reported in error using 1,660 annuals which included borth study and control groups]* FY2017: $8 (1 determination) FY2018: $8 (1 determination) Year 1-3 Cost: $16 Year 1-3 Savings: $52 ($68-$16) FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming ___ ● Benchmark Time to determine Income from Assets: 0.17 hours ● Times average staff wage: $21.95 ● TImes number of Calculations Completed: Of the study group, the number with assets above $25,000	Benchmark met

Cost to Determine utility allowance	FY2016:$2,952.50 FY2017:$2,952.50 FY2018:$2,952.50 Year 1-3 Cost : $7,777.50 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Baseline Time: 0.33 hours per calculation ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Calculations Completed: 779 enrolled in study group	FY2016:$1,372.50 FY2017:$0 FY2018:$0 Year 1-3 Cost:$1,372.50 Year 1-3 Savings:$6,405 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Baseline Time: 0.33 hours per calculation ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Calculations Completed	FY2016: $5,427 (779 determinations) *[Previously reported in error using 1,660 annuals which included both study and control groups]* FY2017: $4,127 (536 determinations) FY2018: $8,070 (956 determinations) Year 1-3 Cost: Year 1-3 Savings: FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Baseline Time: 0.33 hours per calculation ● Times average staff wage for current FY: $25.58 FY18 ● Times number of Calculations Completed	Benchmark met
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Time to Complete Annual Certification	FY2016: 647 hours FY2017: 647 FY2018: 647 Year 1-3: 1,940 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Baseline Time.0.83 hours per cert ● Times number of Annuals Completed:	FY2016 :304 hours FY2017: 83 FY2018 209 Year 1-3: 1,344 hours Savings: 596 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Benchmark Time.0.39 hours per cert ● Times number of Annuals Completed for study group	FY2016: 304 (779 annuals) FY2017: 83 (212 annuals) FY2018: 209 (536 annuals) Year 1-3 Cost: 1,344 Year 1-3 Savings: 596 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Benchmark Time.0.39 hours per cert ● Times number of Annuals Completed for study group	Benchmark met

	779 enrolled in study group			
Time To Determine Tenant Rent	FY2016: 257 FY2017: 364 FY2017: 396 Year 1-3: 1,017 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Time to Determine Tenant Rent: 0.33 hours ● times the number of rent determinations completed for study group	FY2016: 101 FY2017: 70 FY2018: 124 Year 1-3: 295 Savings: 722 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Time to Determine Tenant Rent: 0.13 hours ● times the number of rent determinations completed for study group	FY2016: 101 FY2017: 70 FY2018: 124 Year 1-3: 295 Savings: 72 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Time to Determine Tenant Rent: 0.13 hours ● times the number of rent determinations completed for study group	Benchmark met
Time to Determine Utility Allowance	FY2016: 257 FY2017: 364 FY2017: 396 Year 1-3: 1,017 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Time to Determine Utility Allowance: 0.17 hours ● times the number of UA determinations completed for study group	FY2016: 257 hours FY2017 :177 FY2018: 31 Year 13 : 749 Savings: 268 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Time to Determine Utility Allowance: 0097 hours ● times the number of UA determinations completed for study group	FY2016: 257 hours FY2017 :177 FY2018: 31 Year 13 : 749 Savings: 268 FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming — ● Time to Determine Utility Allowance: 0097 hours ● times the number of UA determinations completed for study group	Benchmark met
Time to Determine Income from Assets	FY2016: 1 hours FY2017: 1 FY2018: 1 Year 1-3: 3 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming	FY2016: 0.13 hours FY2017: 0.13 FY2018: 0.13 Year 1-3: 0.4 hours Savings: 2.6 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming	FY2016: 0 hours FY2017: 0.33 FY2018: 0.33 Year 1-3: 0.66 hours Savings: 2.3 hours FY2019: forthcoming FY2020: forthcoming FY2021: forthcoming Year 4-6 Cost: forthcoming Year 4-6 Savings: forthcoming	Benchmark met

	• Time to Determine Income from Assets: 0.33 hours • times the number of study participants: 1,000 • times the estimated proportion of affected participants: 0.0038 (0.38%)	• Time to Determine Income from Assets: 0.33 hours • times the number of study participants: 1,000 • times the estimated proportion of affected participants: 0.0005 (0.05%)	• Time to Determine Income from Assets: 0.33 hours • times the number of study participants: 1,000 • times the estimated proportion of affected participants	
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage)	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average Error Rate in Determining TTP	18%	15%	1%	Benchmark met
Average Error Rate in Determining Utility Allowance	2%	2%	0%	Benchmark met
SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average Earned	$7,704.87	$7,704.87	$7,704.87	Benchmark met

Income of Study Group				
SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category: (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in in the categories identified below prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in in the categories identified below after implementation of the activity (number).	Actual head(s) of households in in the categories identified below after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in the categories identified below prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in the categories identified below after implementation of the activity (percent).	Actual percentage of total work-able households in the categories identified below after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.

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

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number).	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Study Group Households Receiving TANF Benefits	17	17	17	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change

				expected) has been set.

SS #5: Households Assisted by Services that Increase Self-sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Study Group Households Receiving Self-sufficiency Services	15	15	15	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average HCV Subsidy for Study Group	$637.59	$637.59	$637.59	Benchmark met
SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.

Total HCV Tenant Share for Study Group	$234.08	$234.08	$234.08	Benchmark met
HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero.	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0	0	0	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

iii. Actual Non-Significant Changes: None.

iv. Actual Changes to Metrics/Data Collection: The Agency has agreed to run the demonstration for an additional three years; therefore, all metrics have been updated to reflect this change. In addition, several metrics in the FY2016 and FY2017 reports erroneously reported on the control group. This has been corrected in the metric tables above to only reflect the study group cohort as prescribed in the metric definitions.

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: While SAHA has experienced some expected administrative challenges related to the implementation of this rent reform study, the Housing Choice Voucher program continues to work closely with HUD and MDRC to develop and implement policies, procedures, and training.

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

MTW Statutory Objective(s): Increase Housing Choices

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

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

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

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

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

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

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

Plan Year Update

The tables below compare the baselines and benchmarks for each metric. While the benchmarks have not been met, the Agency has been able to improve the ratio and is seeing fewer resident conflicts at these properties. The benchmarks were originally based on turnover assumptions and

the reality of turnover at these properties has resulted in it taking longer to achieve the 80/20 mix.

HUD Standard Metrics

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). Units occupied by elderly family	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	Actual housing units of this type after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Total number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase).	148 units occupied by elderly family	233 units occupied by elderly family	201 units occupied by elderly family/ 53 additional units occupied by elderly family (201 minus 148)	Benchmark not met.
At Fair Avenue, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase).	110 units occupied by elderly family	173 units occupied by elderly family	155 units occupied by elderly family/ 45 additional units occupied by elderly family (155 minus 110)	Benchmark not met.
At WC White, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase).	38 units occupied by elderly family	60 units occupied by elderly family	46 units occupied by elderly family/ 8 additional units occupied by elderly family (46 minus 38)	Benchmark not met.

SAHA Metrics

Elderly Household Percentage				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Percentage of units occupied by elderly households	Percentage of units occupied by elderly households prior to implementation of the activity	Expected percentage of units occupied by elderly households after implementation of the activity	Actual percentage of units occupied by elderly households after implementation of the activity	Whether the outcome meets or exceeds the benchmark.
Total	51%	80%	71%	Benchmark not met.
Fair Avenue	51%	80%	74%	Benchmark not met.
WC White	51%	80%	63%	Benchmark not met.

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: the Agency has seen a low rate of elderly household applicants at all properties. As a result, staff have been challenged with trying to implement the activity while maintaining a high occupancy at Fair and WC White.

FY2015-3 – Modified Project Based Vouchers

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

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

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

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

Plan Year Update

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

HUD Standard Metrics

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box. Project-Based Vouchers	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	Actual housing units of this type after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
# of additional units made affordable to households based on their actual ability to pay (at or below 80% AMI)	0	36	36	Benchmark met

Wheatley Park Senior Living (units at or below 60% AMI)				
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Wheatley Park Senior Living	# of units * average per unit cost (PUC) * 12 months 36 * $563.38 * 12 = $54,084.48	$0.00	$0.00	Benchmark met
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
Wheatley Park Senior Living	# of recertifications after 3 years (due to triennial recertification schedule) * average staff time per recertification (in hours) 36 * 1.5 = 54 hours	0 hours	0 hours	Benchmark met

SAHA Metrics

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

60% AMI	60% AMI	55% AMI	NA	NA – There were no 60% AMI occupants
50% AMI	50% AMI	45% AMI	38% AMI	Benchmark met
30% AMI	30% AMI	25% AMI	20% AMI	Benchmark met

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: While there are no challenges related to this activity this fiscal year, the activity is connected to FY2011-1e and assumes the challenges noted under FY2011-1e.

FY2015-4 – Simplified Utility Allowance

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

i. Plan Year Approved, Implemented, Amended: This activity was approved in FY2015 and implemented in January 2014 for vouchers issued and May 2014 reexaminations.

ii. Description/Impact/Update/Rent Reform Hardships: Traditionally, SAHA annually reviews and periodically re-establishes a Utility Allowance Schedule which represents reasonable utility cost expectations as part of a tenant's lease. The Utility Allowance Schedule is based on utility surveys and analysis of the type of structure, bedroom size, appliances provided by tenant, and type of appliances (gas/electric).
This activity establishes a new, simplified schedule that is based on the analysis of data collected from SAHA's existing HCV portfolio including the most common structure and utility types. The simplified schedule reduces administrative costs associated with the traditional method of applying a Utility Allowance Schedule. Specifically, the activity will allow the HCV department to be more cost effective by reducing staff time spent on calculating multiple utility schedules for 6 different structure types plus various utility types such as gas, electric or propane.

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

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

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

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

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

Plan Year Update

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

Hardships: There has been no hardship requests associated with this activity this fiscal year.

HUD Standard Metrics

CE #1: Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	0.17 hours multiplied by 6,113 households = 550 hours multiplied by average staff cost $25.58	0.09 hours multiplied by 6,113 households = 550 hours multiplied by average staff cost $25.58	0.09 hours multiplied by 6,113 households = 550 hours multiplied by average staff cost $25.58	Benchmark met. Agency saved $12,510 on the 6,113 households.
	$26,583	$14,073	$14,073	
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	0.17 hours times 6,113 households	0.09 hours times 6,113 households	0.09 hours times 6,113 households	Benchmark met. The Agency saved 489 staff hours
	1,039 hours	550 hours	550 hours	
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	Utility Allowance Error Rate = 2%	Utility Allowance Error Rate = 2%	Utility Allowance Error Rate = 1%	Benchmark met
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$1,060,429	$1,060,429	$1,397,207	Activity is not designed to

				impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

iii. Actual Non-Significant Changes: The utility allowance schedule was not updated during FY2018.

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

v. Actual Significant Changes: None.

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

FY2017-1 – Thrive in Five

(formerly referred to as Time Limited Working Referral Program)

MTW Statutory Objective(s): Promote Self-Sufficiency

i. Plan Year Approved, Implemented, Amended: This activity was approved in December 2016 and implemented in FY2017. The activity was re-proposed to replace a previous pilot which was closed out in FY2016 (FY13-1 Limited Working Preference)

ii. Description/Impact/Update/Rent Reform Hardships: This activity is designed to achieve the MTW statutory objective to give incentives that promote self-sufficiency, by providing working households in need of short-term housing assistance an opportunity to quickly access public housing units.

This activity seeks to provide targeted assistance to a subset of households that 1) are working, and 2) would benefit from a period of increased housing stability to complete education/training, increase savings, or accomplish another self-sufficiency goal. These households will benefit from accelerated access to housing units, and, due to the time limit on the housing assistance, will transition out within 5 years. By focusing on households that have already started on the path to self-sufficiency, this activity should accelerate the number of households that actually transition to self-sufficiency during the period they receive housing assistance.

This activity provides time-limited public housing assistance to working households referred to SAHA by Workforce Solutions Alamo (WSA). Households referred to SAHA by WSA will receive five years of public housing assistance. If, at the end of five years, a hardship exists, two additional years of assistance are made available.

Upon starting housing assistance, participating households are required to enroll and participate in a SAHA self-sufficiency program such as Jobs-Plus or FSS.

Households will typically use the conventional public housing rent structure and recertification schedule. However, both structure and schedule will be affected by the requirements of the self-sufficiency program selected by the household. For example, those enrolled in FSS will make use of an escrow account. Those in Jobs-Plus will have the option to establish an Earned Income Disregard (EID) (MTW Activity: FY13-2 Simplified EID). For households living in Cassiano, the new Cassiano Jobs-Plus program will require an EID.

Plan Year Update

The activity is ongoing and off schedule due to low enrollment in FY2018. As part of the branding strategy, this program has been renamed to *Thrive in Five*.

The tables below compare the baselines and benchmarks for each metric. At fiscal year end, 8 of the original 23 households who enrolled in the previous activity (FY13-1 Limited Working Preference) had exited the public housing program. Only 1 was involuntarily terminated, 1 moved

in with family, 4 voluntarily moved out without giving a reason, and 2 were admitted into the Section 8 program. As a result, there are 15 households in cohort 1.

Hardships: There has been no hardship requests associated with this activity this fiscal year.

HUD Standard Metrics

CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).	Actual amount leveraged after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	0	Forthcoming in FY2019	Forthcoming in FY2019	Forthcoming in FY2019
SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average income of participating households (Average earned income of households affected by this policy in dollars).	Median earned income of households rolling over from pilot program	$4700 annual increment leading to target established by Income Report analysis of median household income at time of self-sufficiency exit ($36,000)	Actual average earned income	Whether the outcome meets or exceeds the benchmark.
	$12,500:	$19,550	$16,222	Benchmark not met
SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Other (Heads and co-heads with any Earned Income)	Number of heads of households and co-heads with earned income prior to implementation of activity.	Expected number of heads or co-heads with earned income after implementation of the activity.	Actual number of heads or co-heads with earned income after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
	18	26	16	Benchmark not met
Other (Heads and co-heads with any Earned Income)	Percentage of total work-able households with heads or co-heads with earned income prior to	Expected percentage of total work-able households with heads or co-heads with earned income	Actual percentage of total work-able households with heads or co-heads with earned income after	Whether the outcome meets or exceeds the benchmark.

	implementation of activity.	after implementation of the activity.	implementation of the activity.	
	75% (18 out of 23)	100%	62% (16 out of 26)	Benchmark not met
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual number of households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	0	1	Benchmark not met
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of qualified households referred by partners and accepted by SAHA to participate (Number of households receiving services aimed to increase self-sufficiency)	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	23 (# of households continuing from pilot)	100 (up to 200 households will participate at a time; participation will ramp up to 200 by year 2)	26	Benchmark not met
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$283.17	$283.17	$303.25	Activity is not designed to impact metric; metric is included for MTW standard metric reporting

				requirements only. Neutral benchmark (no change expected) has been set.
SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$160.92	$160.92	$175.35	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self sufficiency.	Households transitioned to self sufficiency (Number of households paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	Actual households transitioned to self sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	1	0	Benchmark not met
HC #3: Decrease in Wait List Time				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).	Actual average applicant time on wait list after implementation of the activity (in months).	Whether the outcome meets or exceeds the benchmark.

	12 months	2 months	33 months	Benchmark not met

SAHA Metrics

Increase in Household Income, by cohort				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average income of participating households (Average earned income of households affected by this policy in dollars).	Median earned income of households rolling over from pilot program	$4700 annual increment leading to target established by Income Report analysis of median household income at time of self-sufficiency exit ($36,000)	Actual average earned income	Whether the outcome meets or exceeds the benchmark.
	$12,500	Cohort 1: $21,900 Cohort 2: $17,200	Cohort 1: $18,604 Cohort 2: $10,982	Benchmark not met
Increase in Positive Outcomes in Employment Status, by cohort				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Other (Heads and co-heads with any Earned Income)	Number of heads of households and co-heads with earned income prior to implementation of activity.	Expected number of heads or co-heads with earned income after implementation of the activity.	Actual number of heads or co-heads with earned income after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
	18	Cohort 1: 15 Cohort 2: 11	Cohort 1: 11 Cohort 2: 5	Benchmark not met
Other (Heads and co-heads with any Earned Income)	Percentage of total work-able households with heads or co-heads with earned income prior to implementation of activity.	Expected percentage of total work-able households with heads or co-heads with earned income after implementation of the activity.	Actual percentage of total work-able households with heads or co-heads with earned income after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
	75% (18 out of 23)	Cohort 1: 100% Cohort 2: 100%	Cohort 1: 73% Cohort 2: 45%	Benchmark not met
Households Assisted by Services that Increase Self Sufficiency, by cohort				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of qualified households referred by partners and accepted by SAHA to participate (Number of households receiving services	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	23 (# of households continuing from pilot)	Cohort 1: 23 Cohort 2: 100	Cohort 1: 15 Cohort 2: 11	Benchmark not met

aimed to increase self-sufficiency)				
Households Transitioned to Self Sufficiency, by Cohort				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self sufficiency .	Households transitioned to self sufficiency (Number of households paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	Actual households transitioned to self sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	Cohort 1: 95% at 5 years Cohort 2: 95% at 5 years	Cohort 1: 0 Cohort 2: 0	Benchmark not met
Hardship rate				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rate of hardship requests. All types of hardships are counted, including but not limited to requests at the end of the five-year term.	0	Cohort 1: 5% Cohort 2: 5%	Cohort 1: 0 Cohort 2: 0	Benchmark met

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: In general, the benchmarks have not been met -- some of which are likely the result of setting unrealistic income and employment benchmarks. The Agency is committed to promoting education paths that will support career paths leading to at least living wages. Slower increases on income and employment are expected as a result.

In addition to rolling out new marketing materials, the Agency is reviewing the referral and admissions process to identify possible solutions for a lower than expected admissions rate. The Agency continues to work with its partner to receive eligible referrals, provide housing assistance, and dual case management.

FY2017-2 – Restorative Housing Pilot Program

MTW Statutory Objective(s): Promote self-sufficiency

i. Plan Year Approved, Implemented, Amended: This activity was approved in December 2016 and implemented in May 2017.

ii. Description/Impact/Update/Rent Reform Hardships

This activity is designed to achieve the MTW statutory objective to give incentives that promote self-sufficiency, through resident services initiatives that provide eligible probationers and their families a public housing preference. This activity identifies a population of underserved residents – probationers – who currently face challenges securing stable housing. By providing a public housing preference, these households can more quickly establish a solid foundation from which to undertake subsequent reintegration and self-sufficiency goals

This activity is a two-year pilot program that will allow for up to 50 adult probationers who are reporting as part of the "Resurgence Collaborative" reentry initiative to have preference for housing on SAHA public housing properties. Probationers will be selected for application into the pilot by the Bexar County Community Supervision and Corrections Department (CSCD). Probationers in the pilot will receive dual case management support from the SAHA FSS Program and their Community Supervision Officer (CSO). The two-year term of the pilot program does not restrict how long residents will be able to continue to receive housing assistance.

The total number of households to be served under this activity is currently capped at 50. Over 20,000 households are currently on the public housing waitlist. Providing probationers and their households with housing assistance will have a very limited impact on other households currently on the waitlist.

Households will typically use the conventional public housing rent structure and biennial recertification schedule (per MTW Activity FY2014-4). However, both structure and schedule will be affected by the requirements of the self-sufficiency program selected by the household. For example, those enrolled in FSS will make use of an escrow account. Those in Jobs-Plus will have the option to establish an Earned Income Disregard (EID). For households living in Cassiano, the new Cassiano Jobs-Plus program will require an EID.

1. Target Population

Bexar County CSCD will select eligible probationers for the pilot based on the Texas Risk Assessment System (TRAS) in order to identify probationers with high housing "needs" and a relatively low risk of reoffending. Probationers identified with a high housing need and low risk will be screened by their CSO for SAHA's income requirements and disability status to determine their eligibility for SAHA assistance. If the probationer meets SAHA's income requirements they

will be offered to apply for the Pilot via the Referral Form. The probationer's total criminal history will be taken into account for these risk assessments.

2. Criminal History Review

Probationers will be selected for application to the pilot by the Bexar County Community Supervision and Corrections. Only Bexar County adult probationers currently serving a probation sentence for an allowable offense (Class B misdemeanor, nonviolent Class A misdemeanor, lowest-level controlled substance possession offense, or a first-time burglary offense) will be eligible for the pilot program. Probationers concurrently serving three or more separate probation sentences for allowable offenses or a single probation term for three or more allowable offenses will be ineligible for the Pilot. An exemption to current SAHA Screening and Eviction Guidelines will be required to allow some participants in the Pilot population to avoid automatic denial.

Probationers with a criminal history that includes narcotics distribution, violent felonies, or multiple burglary offenses at any time will be ineligible. Probationers with any allowable offenses within the past five years for which they are not currently serving a probation sentence for will also be ineligible unless the probationer successfully completed a probation sentence(s) for the offense(s) in question. Federal bans on sex offenders and persons convicted of drug manufacturing on federal property remain. In addition, people previously evicted from federally-assisted housing or who have committed crimes on SAHA property in the past will be ineligible for the Pilot.

3. Dual Case Management

Probationers selected for the pilot will be dual-case managed by a SAHA FSS Case Worker and their CSO. FSS will attempt to use only one or two case managers for the Pilot population as will the Bexar County CSCD. Selected probationers must be willing to engage in FSS case management for up to 5 years and if they unilaterally terminate case management they may be evicted. Selected probationers in the Pilot will receive a FSS case manager upon entering public housing, and the FSS case manager's role will be to supervise and motivate clients in conjunction with the CSO. Bexar County CSOs will have the final say on what court-ordered services must be completed and in what order, though the FSS case manager and CSO should coordinate and jointly agree on non-court ordered services and supervision. Selected probationers will be required to report to a CSO at the Barbara Jordan Center location in order to utilize services at the Resurgence Collaborative.

The SAHA FSS Case Manager would work to be present and present materials at SAHA-based hearings related to a Pilot participant; the Bexar County CSO would handle criminal and court-related matters pertaining to offenses probationers in the Pilot may commit. Both case managers should coordinate efforts and meet on at least a monthly basis to review problem cases and problem-solve.

The FSS Case Managers will also coordinate with property managers to address problems as needed. Scheduled meetings with clients do not have to be attended by both managers but

efforts and communication should be coordinated so as not to confuse or mislead clients. SAHA will track the results of this Pilot with Bexar County CSCD through the FSS program.

4. Pilot Requirements

The probationers must also stay in good standing with their probation requirements (including substance monitoring and home inspections). Probationers rearrested for violations of their current probation or new criminal offenses may be swiftly evicted from public housing and removed from the lease if determined by their CSO and SAHA. Family members would not be subjected to eviction if another adult in the household is capable of taking over the lease, unless otherwise determined by SAHA and the Bexar County CSCD.

Pilot Probationers who must go to residential drug treatment will not forfeit their public housing unit provided they have other immediate family members already living in the unit and capable of maintaining the lease. Probationers exiting residential drug treatment would still be able to apply to the pilot, if all other eligibility requirements being met. An MOU will be created for the Pilot to share information between SAHA and the Bexar County CSCD. In addition to the MOU the participating probationers will be required to sign a release of information form in order for the CSCD to share any of case specific information (i.e. drug tests) with the SAHA case manager.

Probationers who are evicted due to an arrest or violation will be ineligible to apply for the Pilot in the future. Evicted probationers' spots in the Pilot will be recycled into the population cap for each pilot program. The same will apply for those probationers who leave public housing either voluntarily or through increased self-sufficiency. Individuals who finish their probation requirements may still be required to meet with a FSS case manager, and their spot will be recycled into the Pilot population cap.

Probationers will be required to obtain services at the "Resurgence Collaborative" at the Barbara Jordan Center determined by their FSS case manager and CSO. Services not provided at the Resurgence Collaborative may be completed through FSS/Probation's existing network of services providers. In addition, the FSS case manager will work to engage family members in services offered at the Resurgence Collaborative to build self-sufficiency in the entire family.

5. Pilot Logistics

Up to 50 probationers reporting as part of the "Resurgence Collaborative" reentry initiative and their immediate families will be allowed prioritized access to public housing at SAHA properties over a two-year period. The population cap of 50 will include both probationers coming into new public housing units with their families and probationers who are being allowed to move in with immediate family members that are already living in public housing properties.

Probationers selected for the Pilot will be given a signed referral from their CSO to present to SAHA staff at the Unified Application Center. The Referral Form will be created specifically for this Pilot and will be based on similar referrals for other SAHA special populations/projects. If probationers apply to the Pilot and their term of probation expires before a spot in the Pilot

becomes open, their Referral will expire and they will have to reapply to obtain SAHA housing assistance. Probationers who commit a crime after being accepted into the Pilot but before moving into their unit will be removed from the Pilot.

6. Outcomes

According to 2012 Byrne CJI Grant Implementation Plan Data collected by Trinity University, the Choice Neighborhood footprint (location of the Resurgence Collaborative), and offenders in the footprint have higher rates of recidivism (re-arrests) and a higher arrest rate. The number of people per ZIP code on probation in the footprint is twice that compared to other ZIP codes in Bexar County. Additionally 52% of probationers who live in these ZIP codes had their probation revoked instead of completed, compared to 41% for Bexar County as a whole. Focus groups conducted by Trinity University with probationers also found that transportation is one of the most significant barriers for probationers. Together this baseline data illustrates that the Choice Neighborhood has a higher percentage of probationers, these probationers struggle with basic needs such as transportation, and these probationers have their probation revoked or re-offend at a greater rate than Bexar County as a whole.

The program is anticipated to reduce recidivism among probationers. The prioritized access to housing in the Pilot will also allow SAHA to determine the effect of immediate housing on probationers in regards to such measures.

Plan Year Update

This activity is ongoing and off schedule due to low enrollment in FY2018. After receiving final approval from HUD in December 2016, the Agency worked to implement the activity with its partners. During FY2018, the Agency faced challenges including receiving eligible referrals and those referrals making it through the housing eligibility process. As of the end of FY2018, there were two probationers enrolled. As a result, metrics will be reported on once more pilot slots have been filled.

HUD Standard Metrics

CE #4: Increase in Resources Leveraged				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Amount of funds leveraged in dollars (increase).	Amount leveraged prior to implementation of the activity (in dollars). This number may be zero.	Expected amount leveraged after implementation of the activity (in dollars).	Actual amount leveraged after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$0.00	$6475	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #1: Increase in Household Income				

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase)	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #3: Increase in Positive Outcomes in Employment Status				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category:	Head(s) of households in <<category name>> prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in <<category name>> after implementation of the activity (number).	Actual head(s) of households in <<category name>> after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full- Time	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(2) Employed Part- Time	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(3) Enrolled in an Educational Program	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(4) Enrolled in Job Training Program	Baseline will be established as clients are	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report

	admitted into the program			
(5) Unemployed	Baseline will be established as clients are admitted into the program	5% decrease	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
Report the following information separately for each category:	Percentage of total work-able households in <<category name>> prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Actual percentage of total work-able households in <<category name>> after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
(1) Employed Full- Time	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(2) Employed Part- Time	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(3) Enrolled in an Educational Program	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(4) Enrolled in Job Training Program	Baseline will be established as clients are admitted into the program	5% increase	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
(5) Unemployed	Baseline will be established as clients are admitted into the program	5% decrease	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	0	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households assisted by services	Households receiving self sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self sufficiency services after implementation of the activity (number).	Actual number of households receiving self sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	50	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #6: Reducing Per Unit Subsidy Costs for Participating Households				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	$283.17	$283.17	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #7: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.

	$160.92	$160.92	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self sufficiency.	Households transitioned to self sufficiency prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self sufficiency after implementation of the activity (number).	Actual households transitioned to self sufficiency after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	0 (no transitions expected in first year of 2-year pilot program)	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report
HC #3: Decrease in Wait List Time				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).	Actual average applicant time on wait list after implementation of the activity (in months).	Whether the outcome meets or exceeds the benchmark.
	12 months	2 months	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report

SAHA Metrics

Revocation Rate				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Percentage of revocations (probationers with probation revoked)	Local revocation rate	Expected revocation rate	Actual revocation rate of pilot probationers	Whether the outcome meets or exceeds the benchmark.
	52% (average from sample)	41% or less (average for target zip codes)	Forthcoming in FY2019 Report	Forthcoming in FY2019 Report

iii. Actual Non-Significant Changes: None.

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

v. Actual Significant Changes: None.

vi. Challenges in Achieving Benchmarks and Possible Strategies: The Agency is reviewing the referral and admissions process to identify possible solutions for a lower than expected admissions rate. The Agency continues to work with its partner to receive eligible referrals, provide housing assistance, and dual case management.

A. Activities on Hold

SAHA has implemented all of the Agency's approved activities.

B. Closed Out Activities

Closed out in FY2018
FY2014-4 – Biennial Reexaminations (HCV and PH)
FY2014-5 – Triennial Reexaminations (HCV)
FY2016-2 – Biennial and Triennial Notification of Rent Type Option

i. **Plan Year Approved, Implemented, Amended**: Both the Biennial and Triennial activities were approved in FY2014 and implemented in January 2014. The activity is being closed out in FY2018. FY2016-2 was approved and implemented in FY2016.

ii. **Explain why the MTW activity was closed out:** This activity is being closed out and replaced with the approved FY2019-1 Alternative Recertification Process. FY2019-2 has three main components that are designed to streamline and simplify the recertification process: (1) alternate schedule, (2) alternate public housing review procedures, and (3) alternate income verification methods. It consolidates and updates three previously approved activities related to the first two elements (FY2014-4 Biennial Reexaminations, FY2014-5 Triennial Reexaminations, and FY2016-2 Biennial and Triennial Notification of Rent Type Option) and adds a new waiver for the third element. In addition, reporting cost savings on each of these activities is confusing and redundant. The new activity will track the cost savings of the the streamlined recertification process across both programs and all households.

iii. **In the Plan Year that the MTW activity is closed out provide the following**:

- Discussion of the final outcome and lessons learned: The Agency continues to improve and streamline processes.
- Description of any statutory exceptions outside of the current MTW flexibilities that might have provided additional benefit to the MTW activity (if applicable): SAHA would benefit from a Section 12 flexibility that would allow the agency to conduct review procedures related to the public housing community service requirements at time of reexamination instead of annually.
- Summary table listing outcomes from each year the MTW activity was implemented (if applicable). Below are the cost savings estimates the agency has tracked since FY2014/FY16 for each activity

FY2014-4 – Biennial Reexaminations (HCV and PH)

Metric	Baseline	Target	FY14	FY15	FY16	FY17	FY18
CE #1: Agency Cost Savings	Annuals	Biennials & Triennials	$129,261	$427,141	$210,852	$260,947	$337,903
CE #2: Staff Time Savings	Annuals	Biennials & Triennials	7,452	11,812	11,506	10,039	4,378

FY2014-5 – Triennial Reexaminations (HCV)

Metric	Baseline	Target	FY14	FY15	FY16	FY17	FY18
CE #1: Agency Cost Savings	Annuals	Triennials	$50,981	$15,453	$19,273	$43,440	$17,855
CE#2 Staff Time Savings	Annuals	Triennials	3,343	704	913	1,862	698

FY2016-2 – Biennial and Triennial Notification of Rent Type Option

Metric	Baseline	Target	FY16	FY17	FY18
CE #1: Agency Cost Savings	$3,048	$1,524	$1,524	$1,524	$1,524

Closed out in Prior Years

FY2011-1- Block grant funding with Full Flexibility

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-1a- Promote Education through Partnerships

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-1b- Pilot Child Care Program

Closed out in FY2013 Report.

FY2011-1c- Holistic Case Management

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-1d- Resident Ambassador Program

Closed out as an activity at the close of FY2013, and reported in the new Form 50900 Attachment B Section V. Sources and Uses.

FY2011-2- Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of PH

Closed out in FY2013 Report.

FY2011-3- Biennial reexamination for elderly/disabled (PH)

Closed out in FY2013 and replaced with FY2014-4.

FY2011-4- Streamline methods of verification for PH and HCV
Closed out in FY2013 and replaced with FY2014-1.

FY2011-5- Requirements for acceptable documents for PH and HCV
Closed out in FY2013 and replaced with FY2014-1.

FY2012-10- Biennial Reexamination for Elderly/Disabled Participants on Fixed Income (HCV)
Closed out in FY2013 and replaced with FY2014-4.

FY2012-11- Local Project Based Voucher Program for Former Public Housing Residents
Closed out in FY2013 before implementation due to discussions with HUD regarding the Rental Assistance Demonstration Program.

FY2011-6 – Commitment of Project-Based Vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies (HCV)
Closed out in FY2014 and replaced with FY2015-3 Modified Project-Based Vouchers.

FY2011-7 – Remove limitation of commitment on PBV so that PBV may be committed to more than 25% of the units in family developments without required provision of supportive services (HCV)
Closed out in FY2014 as the Agency is no longer be seeking authorization to commit more than 25% of units at any one development to PBV without the provision of supportive services. The Agency offers supportive services pursuant to Low Income Housing Tax Credit (LIHTC) requirements for existing new development projects.

FY2011-8 – Revise Mobility Rules
Closed out in FY2014 and replaced with FY2015-3 Modified Project-Based Vouchers.

FY2013-2 – Simplified Earned Income Disregard (S-EID) - Only HCV Closing Out
Closed out in FY2014 as the activity was never implemented and the housing program has shifted resources to the successful implementation of the Rent Simplification (FY2014-6) and the MDRC/HUD Rent Reform Activity (FY2015-1).

FY2014-1 – Streamline Reexamination Requirements and Methods (HCV)
Closed out in FY2015 due to PIH Notice 2010 - 19 (HA) which gives housing authorities authorization without the need for an MTW waiver.

FY2013-1 – Time-limited Working Household Preference Pilot Program

Closed out in F2016 and replaced with FY2017-1 to incorporates lessons learned from this pilot

FY2013-3 – Standardize Section 8 and Public Housing Inspection Process

Closed out in FY2016. This activity was designed to unify Section 8 and Public Housing inspection standards. This activity was on hold, pending results of HUD tests at other PHAs. HUD has completed the study and is now conducting a demonstration. SAHA has no plans to participate in the demonstration and will implement new inspection standards for Section 8 in accordance with any new guidelines set forth by HUD.

V. Sources and Uses of Funds

A. Sources and Uses of MTW Funds

i. Actual Sources of MTW Funds in the Plan Year

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

As a block grant agency, SAHA combines PH, HCV, Capital Fund Program (CFP), and Replacement Housing Factor (RHF) funds into a single fund with full funding flexibility.

Sources of MTW Funds include the following:

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

ii. Actual Uses of MTW Funds in the Plan Year

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

SAHA's Board of Commissioners approved the consolidated operating budget on June 1, 2017, for FY2018. Consistent with the MTW plan, funds were obligated and expended to provide funding for the following:

- Salaries and Benefits, Repair Maintenance, Utilities, Protective Salaries (Security Services), Insurance, and Other Expenses that represent the combined operating costs for PH and HCV
- Housing Assistance Payments (HAP) Expense for the HCV Program (payments to landlords)
- Expenditures related to the CFP/DDTF and RHF grants
- Section 8 funding shortfall: $1.4 million
- Preservation & Development: $31.7 million
    - Choice Implementation matching funds for Wheatley Courts Transformation: $1.5 million
    - Development of Chavez Multi-family Property: $8.5 million
    - Expenditures related to capital planning activities: $400 thousand
    - Funding for rehabilitation of Victoria Plaza: $10 million
    - Additional funding for East Meadows Development: $600 thousand
    - Preservation and Expansion of Affordable and Public Housing: $7.2 million

- MTW Initiatives: Program and administration and implementation (described in the next section): $1.1 million

iii. Describe Actual Use of MTW Single Fund Flexibility

The MTW PHA shall provide a thorough narrative of actual activities that use only the MTW single fund flexibility. Where possible, the MTW PHA may provide metrics to track the outcomes of these programs and/or activities. Activities that use other MTW authorizations in Attachment C and/or D of the Standard MTW Agreement (or analogous section in a successor MTW Agreement) do not need to be described here, as they are already found in Section (IV) of the Annual MTW Report. The MTW PHA shall also provide a thorough description of how it used MTW single fund flexibility to direct funding towards specific housing and/or service programs in a way that responds to local needs (that is, at a higher or lower level than would be possible without MTW single fund flexibility).

ACTUAL USE OF MTW SINGLE FUND FLEXIBILITY

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

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

Education Partnerships: SAHA's education-related programming is significant and diverse, and includes:

- REACH Awards: recognize and reward students annually for academic achievement.
- College Scholarship Program: funds scholarships for students annually to provide much needed support to ensure higher educational achievement.
- Education Summit: provides residents with access to education and college resources, financial literacy, and other self-help resources.

Resident Ambassador Empower Program: The Resident Ambassador Program provides meaningful work experience for residents. SAHA has found that this program is an effective strategy to engage all residents in educational, training, workforce development, and other self-sufficiency programs.

Summer Youth Program: This program provides students with work experience and capacity development such as resume writing, banking/financial literacy, interview skills, conflict resolution and other life and workforce development soft skills.

Health and Wellness: SAHA sponsors a variety of events to promote health and wellness, including:

- Golden Gala: much-loved annual event that serves elderly and disabled residents.
- H2A (Healthy Habits Active) Living Awards: highlight resident involvement and engagement in civic engagement, health, and other quality of life activities.
- Annual Father's Day initiative: engages families in positive family activities and recognize fathers' contributions through "El Hombre Noble" awards

Fiscal Year 2018 MTW Initiatives Outcomes

Below are key outcomes for the Agency's resident services initiatives. All initiatives are supported by the Agency's investment in the MTW Program Administration.

MTW INITIATIVES SCORECARD

★ Exceeds | ✓ Met Target or On Track
! Near Target | x Did not Meet Target

	Metric	FY2018 Target	FY2018 Actual	FY2018 Status
❶ Improve Quality of Life for residents	Events/Activities Hosted	1,450	1,574	★
	Residents Participating	18,000	18,133	★
	Active Resident Councils	30	20	✘
❷ Provide Access to resources and non-SAHA programs	Food Assistance Value	$1,300,000	$1,485,664	★
	Referrals for Services	3,000	7,358	★
	Health Fairs	12	11	!
	Residents Participating	NA	150	--
	Number of Awards (REACH & Scholarships)	250	282	★
	REACH Awards	200	230	★
	College Scholarships	50	52	★
	Total Awarded Amount	$54,605	$61,595	★
	REACH Awards	NA	$6,895	★
	College Scholarships	NA	$54,700	★
	Summer Youth Employed	80	74	!
❸ Improve Resident Capacity	FSS/Jobs Plus Participants	1,500	1,530	★
	Residents enrolled into education and training	35%	23%	✘
	Resident Council training	4	4	✓
	Early Engagement sessions [Activity FY2014-2]	10	11	★
	Participants	2,000	2,198	★
	Residents completing Financial Literacy Training	TBD	358	✓
	Residents completing ConnectHome Training	200	650	★
	Devices Distributed	200	385	★
	Households Connected	200	273	★
	Households Assessed by Elderly Disabled Services	1,468	1,523	★
	Households maintaining independence	80%	86%	★
❹ Facilitate residents to achieve Self-Sufficiency	FSS Graduates	TBD	31	✓
	GED/HS Diplomas Earned	TBD	64	✓
	Certifications Earned	TBD	56	✓
	Residents Securing Employment	TBD	107	✓

B. Local Asset Management Plan

i. Did the MTW PHA allocate costs within statue in the Plan Year?	NA
ii. Did the MTW PHA implement a local asset management plan (LAMP) in the Plan Year?	NA
iii. Did the MTW PHA provide a LAMP in the appendix?	NA

iv. If the MTW PHA has provided a LAMP in the appendix, please provide a brief update on implementation of the LAMP. Please provide any actual changes (which must be detailed in an approved Annual MTW Plan/Plan amendment) or state that the MTW PHA did not make any changes in the Plan Year:

Not Applicable

MTW agreement Attachment D:

Update on RHF Funds included in the MTW Block grant

Pursuant to the Agency's MTW Agreement (as amended on July 1, 2013; Fourth Amendment), the Agency is required to provide an update on the amount of RHF funds included in the MTW Block Grant, the amount of funds spent on construction of new public and/or affordable housing, the number of units being constructed, and the status of construction.

As of June 14, 2018, HUD has approved the final closeout of the remaining RHF grants. See attached HUD approval letter.

Note: [1] Wheatley Phase I total amount as illustrated in the mixed finance F-1 is $967,870; however, the total amount of $1,017,870 shown above includes $50,000 Administration.

FY 2018 MTW Report
Replacement Housing Factor Fund Expenditures
As of June 30, 2018

Project Name	Units						Estimated Completion Date	% of Completion	RHF Grant	RHF Grant Number	RHF Allocation	RHF Funds Expended	Remaining to Expend
	Total	Public Housing	PBV	City HOME	Tax Credits	Market							
The Park at Sutton Oaks (Sutton II)	208	49			113	46	June 2014	100%	2006 RHF 2nd Increment	TX59R006502-06	$ 2,608,481.00	$2,608,481.00	$ -
									2008 RHF 2nd Increment	TX59R006502-08	$ 209,083.10	$ 209,083.10	$ -
									Total Sutton II		$ 2,817,564.10	$2,817,564.10	$ -
The Gardens at San Juan Square (San Juan III)	252	63	31	27	131		December 2014	100%	2009 RHF 2nd Increment	TX59R006502-09	$ 1,408,098.00	$1,408,098.00	$ -
									2009 RHF 2nd Inc. Add'l	TX59R006504-09	$ 918,844.44	$ 918,844.44	$ -
									2010 RHF 2nd Increment	TX59R006502-10	$ 1,718,182.56	$1,718,182.56	$ -
									2011 RHF 2nd Increment	TX59R006502-11	$ 383,875.00	$ 383,875.00	$ -
									Total San Juan III		$ 4,429,000.00	$4,429,000.00	$ -
Wheatley / CNI (Relocation)									2012 RHF 2nd Increment	TX59R006502-12	$ 76,939.00	$ 76,939.00	$ -
Wheatley / CNI (Pre-Development Site Prep)							December 2016	100%	2008 RHF 2nd Increment	TX59R006502-08	$ 337,900.47	$ 337,900.47	$ -
									2009 RHF 1st Increment	TX59R006501-09	$ 91,863.00	$ 91,863.00	$ -
									2009 RHF 2nd Inc. Add'l	TX59R006504-09	$ 200,461.56	$ 200,461.56	$ -
									2010 RHF 1st Increment	TX59R006501-10	$ 360,291.00	$ 360,291.00	$ -
									2010 RHF 2nd Increment	TX59R006502-10	$ 92,541.44	$ 92,541.44	$ -
									2011 RHF 1st Increment	TX59R006501-11	$ 611,478.99	$ 611,478.99	$ -
									2011 RHF 2nd Increment	TX59R006502-11	$ 41,851.00	$ 41,851.00	$ -
									2012 RHF 1st Increment	TX59R006501-12	$ 98,369.47	$ 98,369.47	$ -
									2013 RHF 1st Increment	TX59R006501-13	$ 549,153.00	$ 549,153.00	$ -
									2013 RHF 2nd Increment	TX59R006502-13	$ 84,890.00	$ 84,890.00	$ -
									2014 RHF 1st Increment	TX59R006501-14	$ 150,952.00	$ 150,952.00	$ -
									2014 RHF 2nd Increment	TX59R006502-14	$ 9,509.29	$ 9,509.29	$ -
									Total Wheatley Pre-Development Site Prep		$ 2,629,261.22	$2,629,261.22	$ -
Wheatley Phase I / CNI Phase II (East Meadows Phase I)	215	71	8		77	59	May 2017	100%	2011 RHF 1st Increment	TX59R006501-11	$ 50,000.01	$ 50,000.01	$ -
									2012 RHF 1st Increment	TX59R006501-12	$ 422,399.53	$ 422,399.53	$ -
									2014 RHF 1st Increment	TX59R006501-14	$ 379,376.00	$ 379,376.00	$ -
									2014 RHF 2nd Increment	TX59R006502-14	$ 69,548.71	$ 69,548.71	$ -
									2015 RHF 1st Increment	TX59R006501-15	$ 96,545.75	$ 96,545.75	$ -
									Total Wheatley Phase I [1]		$ 1,017,870.00	$1,017,870.00	$ -
Wheatley Phase II / CNI Phase III (Wheatley Park Senior Living)	80	40	36		4		March 2018	100%	2015 RHF 1st Increment	TX59R006501-15	$ 224,868.25	$ 224,868.25	$ -
									2015 RHF 2nd Increment	TX59R006502-15	$ 80,032.00	$ 80,032.00	$ -
									2015 CFP-DDTF	TX59P006502-15	$ 220,088.00	$ 220,088.00	$ -
									2016 CFP-DDTF	TX59P006502-16	$ 832,561.00	$ 797,775.23	$ 34,785.77
									2016 RHF 2nd Increment	TX59R006502-16	$ 80,606.00	$ 80,606.00	$ -
									Total Development Activity		$ 1,438,155.25	$1,403,369.48	$ 34,785.77

U.S. Department of Housing and Urban Development
San Antonio Field Office, Region VI
Office of Public Housing
615 E. Houston Street, Suite 347
San Antonio, Texas 78205-2001
Phone (210) 475-6860 Fax (210) 472-6817
www.hud.gov www.espanol.hud.gov

JUN 14 2018

Emailed - Compliance Recipients

RECEIVED
JUN 18 2018

Mr. David Nisivoccia
President & CEO, Housing Authority
of the City of San Antonio
818 S. Flores
San Antonio, TX 78204

Dear Mr. Nisivoccia:

SUBJECT: TX006, San Antonio Housing Authority (Pre-Audit Close-Outs)
2006 Replacement Housing Factor Fund Program, **TX59R006502-06**
2008 Replacement Housing Factor Fund Program, **TX59R006502-08**
2009 Replacement Housing Factor Fund Program, **TX59R006502-09**
2009 Replacement Housing Factor Fund Program, **TX59R006504-09**
2010 Replacement Housing Factor Fund Program, **TX59R006502-10**
2011 Replacement Housing Factor Fund Program, **TX59R006502-11**
2012 Replacement Housing Factor Fund Program, **TX59R006502-12**
2013 Replacement Housing Factor Fund Program, **TX59R006502-13**
2014 Replacement Housing Factor Fund Program, **TX59R006502-14**
2015 Replacement Housing Factor Fund Program, **TX59R006502-15**
2016 Replacement Housing Factor Fund Program, **TX59R006502-16**

Thank you for submitting the *pre-audit* close-out documents for the **2006** through the **2016** Replacement Housing Factor Fund Programs. The following documents were submitted for our review:

1. **The Actual Modernization Cost Certificate, form HUD-53001; and,**
2. **The Final Annual Statement/Performance and Evaluation Report form HUD-50075.1**

We have reviewed the closeout documents for the subject grants and find them acceptable. Please include forms HUD-53001, *Actual Modernization Cost Certificate*, as financial statements in your next IPA audit for these Capital Fund Program grants.

Our approval of the final closeout of these programs, are contingent upon the audit verification of the amounts reported on the certificates, and compliance with their program requirements. Enclosed, please find executed copies of the cost certificates, and the "final" budget reports.

If you should have any questions, please contact Gordon J. Tabone, General Engineer, at Gordon.J.Tabone@hud.gov; or, at (210) 475-6888.

Sincerely,

Joseph A. Uviedo

Joseph A. Uviedo
Deputy Director
Office of Public Housing

Enclosures:

Update on Total Capital Funds Expended – Active Grants

As of June 30, 2018						
Capital Fund Program (CFP) Grant Year	Grant Number	Obligation End Date	Expenditure End Date	Grant Amount	Expended	Remaining To Expend
2014 CFP	TX59P006501-14	5/12/2016	5/12/2018	$ 7,294,109.00	$ 7,294,109.00	$ -
2015 CFP	TX59P006501-15	4/12/2017	4/12/2019	$ 7,539,807.00	$ 7,324,752.31	$ 215,054.69
2016 CFP	TX59P006501-16	4/12/2018	4/12/2020	$ 7,805,380.00	$ 6,454,456.83	$ 1,350,923.17
2017 CFP	TX59P006501-17	8/16/2019	8/16/2021	$ 7,973,378.00	$ 894,652.56	$ 7,078,725.44
2018 CFP	TX59P006501-18	5/28/2020	5/28/2022	$ 12,191,825.00	$ -	$ 12,191,825.00
	Total Capital Funds			$ 42,804,499.00	$ 21,967,970.70	$ 20,836,528.30

VI. Administrative

A. Reviews, Audits and Inspections

General description of any HUD reviews, audits or physical inspection issues that require the agency to take action to address the issue.

This fiscal year, SAHA had a total of 267 EHS (Exigent Health and Safety) issues that required action. The majority of EHS issues were related to missing or non-functioning smoke detectors. All EHS issues were addressed by the Agency within 24 hours.

B. Evaluation Results

Results of latest PHA-directed evaluations of the demonstration.

SAHA did not have any PHA-directed evaluations of the MTW demonstration.

C. MTW Statutory Requirement Certification

Certification that the PHA has met the three statutory requirements in the Plan Year of: (1) ensuring that at least 75% of households assisted by the MTW PHA are very low-income, (2) continuing to assist substantially the same total number of households as would have been assisted had the MTW PHA not participated in the MTW demonstration, and (3) maintaining a comparable mix of households (by family size) served as would have been served had the MTW PHA not participated in the MTW demonstration.

See the following page.

D. MTW Energy Performance Contract (EPC) Flexibility Data

Not Applicable

Certification of MTW Statutory Compliance

The San Antonio Housing Authority hereby certifies that it (the Agency) has met the three statutory requirements of:

1) Assuring that at least 75 percent of the families assisted by the Agency are very low-income families: At fiscal year-end, 17,572 households out of a total of 18,080 (97%) households were very low-income (<50% AMI).

	Total Households	Number below 50% AMI	% Below 50% AMI
PH	5,662	5,537	98%
Vouchers	12,199	11,869	97%
Other (Local, Non-Traditional)	219	166	76%
Total	**18,080**	**17,572**	**97%**

2) Continuing to assist substantially the same total number of eligible low- income families as would have been served had the amounts not been combined: The Agency's FY2017 MTW families served (annual average) is 17,819 out of 17,901 MTW adjusted baseline denominator (99.5%). SAHA continues to serve substantially the same number of households as it did upon entering the MTW demonstration.

	MTW Baseline	FY2018 Average Leasing	MTW Baseline Compliance Calculation
PH	5,755	5,630	98%
Vouchers	12,146	12,019	99%
Other (Local, Non-Traditional)	---	170	NA
Total	**17,901**	**17,819**	**99.5%**

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

Mix of Family Sizes Served

	MTW Baseline	FY2018 Percentage (FYE)	Percentage Change
1-person	36%	38%	2%
2-person	16%	18%	2%
3-person	18%	16%	-2%
4-person	15%	14%	-1%
5-person	9%	8%	-1%
6-person+	7%	6%	-1%

David Nisivoccia
President and CEO

9.24.18
Date

89

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Moving to Work Annual Report

Fiscal Year 2018: July 1, 2017 to June 30, 2018

Submitted September 30, 2018

San Antonio Housing Authority | 818 S. Flores | San Antonio, TX 78204 | www.saha.org