



Moving to Work Annual MTW Report- FY2012-2013

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Originally Submitted September 27, 2013/ Revisions Submitted September 22, 2014

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Table of Contents

I. Introduction	2
Activities Overview	4
II. General Housing Authority Operating Information	12
A. Housing Stock Information	12
Number of public housing units at the end of the plan year	12
Description of any significant capital expenditures by development	12
Description of any new public housing units added during the year by development.....	12
Number of public housing units removed from the inventory during the year by development	12
Number of MTW HCV authorized at the end of the Plan year.....	12
Number of non-MTW HCV authorized at the end of the Plan year	13
Number of HCV units project-based during the Plan year, including description of each separate project.....	14
Overview of other housing managed by the Agency, e.g., tax credit, state-funded, market rate.....	14
B. Leasing Information	15
Total number of MTW PH units leased in Plan year	15
Total number of non-MTW PH units leased in Plan year.....	15
Total number of MTW HCV units leased in Plan year.....	15
Total number of non-MTW HCV units leased in Plan year	16
Description of any issues related to leasing of PH or HCVs	16
Number of project-based vouchers committed or in use at the end of the Plan year, describe project where any new vouchers are placed.....	17
C. Waiting List Information.....	18
Public Housing.....	18
Housing Choice Voucher Program	19

III. Non-MTW Related Housing Authority Information (optional).....	20
A. List planned vs. actual sources and uses of other HUD or other Federal Funds (excluding HOPE VI).....	20
B. Description of non-MTW activities implemented by the Agency	20
Supportive Housing	20
Homeownership Program	20
IV. Long-term MTW Plan (Optional).....	21
V. Proposed MTW Activities: HUD Approval requested	23
FY2013-1 – Time-limited Working Preference Pilot Program.....	24
FY2013-2 – Simplified Earned Income Disregard (EID).....	26
FY2013-3 – Standardized Section 8 and Public Housing Inspection Processes.....	28
VI. Ongoing MTW Activities	29
FY2011-1 - Block Grant Funding with Full Flexibility.....	29
FY2011-1a – Promote Education through Partnerships.....	32
FY2011-1c – Holistic Case Management Model.....	33
FY2011-1d – Resident Ambassador Program	36
FY2011-1e – Preservation and Expansion of Affordable Housing.....	38
FY2011-3 – Biennial Recertification for Public Housing Elderly/Disabled on 100% Fixed Income	39
FY2011-4 - Streamline Methods of Verification for Public Housing and HCV	41
FY2011-5 - Requirements for Acceptable Documents for Public Housing and HCV	43
FY2011-6 - Commitment of PBV to SAHA-owned or Controlled Units with Expiring Subsidies	44
FY2011-7 - Remove the Limitation on Commitment of PBV so that PBVs May Be Committed to More Than 25% of the Units in Family Developments without Required Provision of Supportive Services	46
FY2011-8 - Revise Mobility Rules for PBVs	48
FY2011-9 - Allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who will provide supportive services to those households	50
FY2012-10 – Biennial Recertification for HCV Elderly/Disabled Participants on 100% Fixed Income.....	51

FY2013-4 – HQS Inspection and Rent Reasonableness Assessment of SAHA-owned non-profits by SAHA inspectors	52
VII. Sources and Uses of Funding	53
A. List planned vs. actual sources (Operating, Capital, and HCV) and uses of MTW Funds (excluding HOPE VI). Provide a narrative description of any major changes from approved MTW Plan	53
B. List planned vs. actual sources and uses of State or local funds	55
C. If applicable, list planned vs. actual sources and uses of the COCC.....	56
D. If using a cost allocation or fee-for-service approach that differs from 1937 Act requirements, describe the actual deviations	57
E. List or describe planned vs. actual use of single-fund flexibility	57
F. Optional - List planned vs. actual reserve balances at the end of the plan year.....	57
G. Optional - In plan appendix, provide planned vs. actual sources and use by AMP	57
H. Initiatives.....	58
New Development	58
Energy & Water Conservation and Operational Efficiencies	62
Comprehensive Resident Training and Employment Partnership	63
Student Achievement Partnerships	64
Education Investment Foundation (EIF).....	64
Health and Wellness	65
VIII. Administrative.....	66
A. Description of progress on the correction or elimination of observed deficiencies cited, if applicable	66
B. Results of latest Agency-directed evaluations of the demonstration, as applicable.....	66
C. Performance and Evaluation Report for Capital Fund activities not included in the MTW Block Grant, as an attachment to the Report (See Appendix A).....	66
D. Certification that the Agency has met the three statutory requirements (See Appendix B).....	66

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I. Introduction

Founded in 1937, the San Antonio Housing Authority (SAHA) provides housing to over 70,000 children, adults, and seniors through three housing programs – Public Housing, Housing Choice Vouchers, and Mixed-Income housing programs. SAHA employs approximately 500 people and has an annual operating budget of \$168 million. Existing real estate assets are valued at over \$500 million. SAHA’s affordable housing programs include 71 Public Housing properties, more than 13,000 vouchers in the Housing Choice Voucher and Special Voucher programs, and 45 properties in a Mixed-Income portfolio.

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 MTW program focuses on three goals:

- Reduce cost and achieve greater costs effectiveness in Federal expenditures;
- Give incentives to families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient; and
- Increase housing choices for low-income families.

This year’s MTW Report highlights SAHA’s FY2012-2013 successes and outlines recent challenges related to activities designed to further the agency in meeting all three of these goals. The agency saved over \$150,000 in FY2012-2013 through biennial recertifications for households on fixed-income and Housing Quality Standards (HQS) Inspections of SAHA-owned non-profit units for Section 8 vouchers. The agency is positioned to substantially increase these savings with a new FY2013-2014 MTW Plan that expands biennial recertifications to all households and adds triennial recertifications for voucher households on a fixed income.

The agency has increased case management services by 39% (2,335 families increased to 3,246 families) and self-sufficiency engagement by 80% (813 families increased to 1,467). SAHA is positioned to increase self-sufficiency successes through a new FY2013-2014 activity that engages residents from the moment they enroll in one of SAHA's housing wait lists. The goals of the initiative include reducing the number of crises families encounter, initiating the discussion of self-sufficiency from the time a family enrolls in a housing wait list, and creating a new housing experience centered around accountability and temporary dependence on public assistance.

SAHA has also leveraged its resources to preserve and expand affordable housing in the city of San Antonio. Several development projects (San Juan Phase III and Sutton Phase II (Wheatley Phase I of the Choice Neighborhood Initiative Transformation Plan)) are positioned to add 460 affordable units in FY2014, of which at least 112 will be units reserved for families at 30% of area median income (AMI). Local set-aside vouchers and project-based vouchers continue to serve over 200 households and provide increased housing choices for at-risk families.

In December 2012, SAHA received the \$30 million Choice Neighborhoods Implementation Grant from the U.S. Department of Housing and Urban Development (HUD) for the revitalization of Wheatley Courts on the Eastside of the city after competing with 42 other communities. The agency has developed a Choice Neighborhood Initiative Transformation Plan for the Wheatley Courts site that proposes 383 units, of which 242 units will be reserved for families at 30% of AMI.

The agency has completed various capital improvement projects at public housing properties using CFP grants. SAHA receives capital improvement grants annually and they are used towards repairs and renovations that will either add to the property value or will increase the useful life of the property. SAHA received \$8,800,604 for the 2008 CFP grant and \$9,252,125 for the 2009 CFP grant, totaling \$18,052,729. Various projects started and/or completed include: (1) a comprehensive modernization of Lewis Chatham and Marie McGuire Apartments, senior communities; (2) elevator upgrades at various public housing elderly communities; (3) interior repairs and renovations of dwelling units and common areas; and (4) roof replacements, system repairs, and playground upgrades. Both the 2008 and 2009 CFP grants have been 100% expended and are in the process of being closed. Approximately 35 properties will have been positively impacted at the close of the 2008/2009 CFP grants. The Performance and Evaluation summary reports are listed in Appendix A.

Activities Overview

The following overview describes the activities, approaches, projects and partnerships associated with each of the three MTW goals. In SAHA’s FY2013-2014 MTW Plan, many activities were consolidated and moved to more appropriate sections of the report. For purpose of clarity, the overview also indicates, where appropriate, the status of the activity as of the FY2013-2014 Plan submitted to HUD in April 2013.

Activity	Name/Description	Statutory Objective	Update
FY2011-1	Block grant funding with full flexibility	Increase housing choices	Implemented in FY2010-2011 and will be closed out as an activity, and reported in the new Form 50900 Attachment B Section II.5.B. Leasing Information.
	SAHA combined the Public Housing Operating Subsidy, Capital Fund Program Grants, and Housing Choice Voucher Program Subsidy under a single fund block grant effective July 1, 2010. The block grant funding with full flexibility will allow SAHA to continue to serve at least the same number of households below 50% AMI. HUD no longer requires the block grant funding waiver to be tracked as a MTW activity, SAHA will continue to monitor the progress of the funding flexibility by tracking the number of households served by family size and AMI in the new 50900 Attachment B Section II.5.B. Leasing Information.		
FY2011-1a	Promote Education through Partnerships	Promote self-sufficiency	Implemented in FY2010-2011 and has been closed out as an activity in FY2013-2014 Plan, and will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds starting in FY2013-2014 Report and FY2014-2015 Plan.

Activity	Name/Description	Statutory Objective	Update
FY2011-1a	<p>This activity has grown from one partnership to many, expanding the potential number of participants and the scope of activities. The activity remains focused on promoting education through any and all available partnerships. Originally, SAHA had partnered with Alamo Colleges' Gateway to College program, on a pilot that promoted education among public housing and HCV residents between the ages of 19 to 24. The Gateway to College program ended in 2012, a result of a change in the program's structure by Alamo Colleges. SAHA has focused on developing new partnerships to promote education. Additional partnerships include: (1) Margarita R. Huantes Center: This partnership, formed in the fall of 2011, allows SAHA access to the Career Advancement Resources and Educational Services (C.A.R.E.S.) workforce development program. The program is a free, 6-week, 40 hour per week, education process where candidates are empowered to acquire and retain employment; and (2) Alamo Colleges Economic and Workforce Development Department: This partnership was formed in the fall of 2011 and provides access to the Health Professions Occupations Grant (HPOG). Under this grant, seven classes or sessions have been proposed to train up to 20 housing program participants in each class/session. Alamo Colleges provides tuition, books, and other supplies for on-the-job training.</p> <p>Because this activity only utilizes the block grant funding waiver in the MTW agreement, HUD no longer requires it to be tracked as an activity. Starting in FY2013-2014 Report and FY2014-2015 Plan, it will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds.</p>		
FY2011-1b	Pilot Child Care Program	Promote self-sufficiency	Implemented in FY2010-2011 and closed out in FY2011-2012.
<p>SAHA designed the pilot child care training program to offer child care and after school services at designated family public housing developments. The agency partnered with child care providers, as well as with job training programs, to create a comprehensive child care certification program with an on-the-job training (OJT) component. Residents enrolled in this program obtain training and certification to be able to work in a SAHA/collaborative partnership child care facility and provide child care services to families in the same development. Residents living in the designated pilot properties would then be able to utilize the child care facility if they were participating in the MTW program and were involved in any of the following approved self-sufficiency activities: education (i.e., GED, college, learning seminars), job training, employment, or job seeking.</p> <p>The pilot childcare training program ended in the fall of 2011. While the program did have some success in FY2011 in assisting 10 residents in their completion of child care training and certification, there was not enough support for the program to continue.</p>			

Activity	Name/Description	Statutory Objective	Update
FY2011-1c	Holistic Case Management	Promote self-sufficiency	Implemented in FY2010-2011 and has been closed out as an activity in the FY2013-2014 Plan, and will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds starting in FY2013-2014 Report and FY2014-2015 Plan.
	<p>The holistic case management model is designed to address barriers to employment for housing program residents and participants. Case Management is provided under the FSS Program, the Elderly/Disabled Services (EDS) Program, and the Jobs-Plus program. Currently there are 23 case managers/service providers providing FSS/Jobs Plus enrollment, holistic case management, special program administration, and social service assistance to property management. Thirty-seven (37) public housing and non-profit properties have an assigned case manager. In addition, case managers are available for HCV participants.</p> <p>Because this activity only utilizes the block grant funding waiver in the MTW agreement, HUD no longer requires it to be tracked as an activity. Starting in FY2013-2014 Report and FY2014-2015 Plan, it will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds.</p>		
FY2011-1d	Resident Ambassador Program	Promote self-sufficiency	Implemented in FY2010-2011 and has been closed out as an activity in the FY2013-2014 Plan, and will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds starting in FY2013-2014 Report and FY2014-2015 Plan.
	<p>The resident ambassador program encourages resident participation in outreach and promotion for education, job-training, employment, and community building activities. The ambassadors' purpose is to inform and motivate fellow residents to participate in self-sufficiency activities. Under this activity, residents were provided with a stipend for the following activities:</p> <ul style="list-style-type: none"> • Promoting self-sufficiency activities • Co-organizing community building events • Providing grassroots outreach by distributing flyers and talking with neighbors • Serving as mentors to other residents <p>Because this activity only utilizes the block grant funding waiver in the MTW agreement, HUD no longer requires it to be tracked as an activity. Starting in FY2013-2014 Report and FY2014-2015 Plan, it will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds.</p>		
FY2011-1e	Preservation and expansion of affordable housing	Increase housing choices	Implemented in FY2010-2011 and ongoing.

Activity	Name/Description	Statutory Objective	Update
FY2011-1e	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. Multiple financing sources will be used to achieve the goals for preservation and expansion. Capital improvements to existing properties will be made to extend the life of a property, improve livability, and decrease operating expenses. Expansion will be done in areas that achieve multiple community goals and include deeply subsidized housing.		
FY2011-2	Simplify and streamline HUD approval process for the development, redevelopment, and acquisition of PH	Increase housing choices	Implemented in FY2010-2011 and has been closed out in the FY2013-FY2014 Plan.
	This activity simplifies and streamlines the HUD approval process in accordance with HUD's Proposed Rule for the "Streamlined Application Process in Public/Private Partnerships for Mixed-Finance Development of Public Housing Units" as published in the Federal Register on December 27, 2006. This activity was closed out due to recent reduced transaction times for housing developments.		
FY2011-3	Biennial reexamination for elderly/disabled (PH)	Reduce cost and increase cost effectiveness	Implemented in FY2010-2011 and has been closed out in the FY2013-FY2014 Plan. This activity will be replaced by new activities FY2014-4.
	In January, 2011, the Elderly and Disabled portfolio of Public Housing began biennial re-certification for all families on 100% fixed income. This activity is proposed to be replaced by new activities that provide new definitions of households eligible for Biennial Reexaminations.		
FY2011-4	Streamline methods of verification for PH and HCV	Reduce cost and increase cost effectiveness	Implemented in FY2010-2011 and has been closed out in the FY2013-FY2014 Plan. This activity will be replaced by the new activity FY2014-1.
	While continuing the mandatory use of the Enterprise Income Verification (EIV) report, HCV staff transitioned from the use of third-party verification of income from employers to the use of participant-provided documents. SAHA continues to use oral verifications and/or mailed third-party verification in the event of a discrepancy or if documents appear altered. The agency also employs quality control measures to randomly select participant accounts and require additional verification to ensure the integrity of the verification process. Third-party verification of assets is still required for assets totaling a value of \$25,000 or more.		

Activity	Name/Description	Statutory Objective	Update
FY2011-5	Requirements for acceptable documents for PH and HCV	Reduce cost and increase cost effectiveness	Implemented in FY2010-2011 and has been closed out in FY2013-FY2014. This activity will be replaced by the new activity FY2014-1.
	In addition to streamlining methods of document verification (FY2011-4), SAHA wanted to reduce the number of applicants and participants resubmitting documents for approved extension of voucher, and/or reasonable accommodations. SAHA proposed to change the policy regarding the length of time that applicant/participant-provided documents would be valid for verification purposes. Applicant-provided documents dated from 60 to 90 calendar days from the eligibility appointment and participant-provided documents dated from 120 to 180 calendar days from the recertification appointment would be valid.		
FY2011-6	Commitment of project-based vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies	Increase housing choices	Implemented in FY2010-2011 and ongoing with significant changes being implemented in FY2013-2014.
	<p>SAHA proposed to commit PBV to (1) a development in its affordable mixed-income housing portfolio, and/or (2) privately-owned developments with expiring subsidies, where the commitment of PBV would preserve low-income housing opportunities. SAHA currently has 181 committed PBV units at Springhill Apartments. SAHA has evaluated the need of PBV at other properties and plans to revise this activity to include other communities within SAHA's portfolio. As a result, no PBV were committed to developments with expiring subsidies.</p> <p>In FY 2013-14 SAHA proposes to increase the number of PBV committed units in new developments in its affordable mixed-income housing portfolio. The number of PBV units committed will not exceed 250.</p>		
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	Increase housing choices	Implemented in FY2010-2011 and ongoing.
	This activity is used in conjunction with activity FY2011-6, and allows SAHA to commit PBV to developments in proportions greater than 25% of the units. This will help to preserve affordable housing and provide additional low-income housing opportunities. SAHA may offer some supportive services for these developments, but needs the flexibility not to offer such services for every unit where PBV will be committed.		

Activity	Name/Description	Statutory Objective	Update
FY2011-8	Revise mobility rules for PBV	Increase housing choices	Implemented and ongoing.
	SAHA proposes that PBV households have priority for the first available tenant-based voucher after two years, rather than one year, of occupancy. This would assist efforts to stabilize occupancy at the first development where PBV will be committed, the Springhill development, as well as other developments where SAHA may commit PBV units.		
FY2011-9	Allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who will provide supportive services to those households	Increase housing choices	Implemented and ongoing. Proposed to remove two metrics in FY2013-2014 Plan: <ul style="list-style-type: none"> • Cost of services that each family receives • Average earned income of households who are provided housing and services under set-aside vouchers These metrics do not effectively measure the success of set-aside voucher allocation. SAHA will measure the success of this activity by the number of vouchers committed and the number of households served after two years.
	SAHA will allocate set-asides of tenant-based vouchers for households referred by non-profit sponsors who commit to provide supportive services. The set-asides would be 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).		
FY2012-10	Biennial Reexamination for Elderly/Disabled Participants on Fixed Income (HCV)	Reduce cost and increase cost effectiveness	Implemented in FY2010-2011 and has been closed out in the FY2013-FY2014 Plan. This activity will be replaced by the new activity FY2014-4.
	SAHA conducts biennial recertification for elderly/disabled HCV participant households that are on 100% fixed income. SAHA initially used random selection methods and tools to select elderly and disabled voucher participants in scheduling recertifications. Half of the HCV participants were on a two-year recertification cycle starting in the first year and the remainder starting in the second year of program implementation. Every family has the option of interim recertification at any time, if there is a change in family composition, reduction in income or an increase in medical expenses.		
FY2012-11	Local Project Based Voucher Program for Former Public Housing Residents	Increase housing choices	Closed out before implementation due to discussions with HUD regarding the RAD option.

Activity	Name/Description	Statutory Objective	Update
FY2012-11	<p>With respect to public housing units that have been disposed of and converted to PBV, SAHA may modify the PBV program policy for former public housing residents, including but not limited to continuation of Family Self-Sufficiency participants, which lived in units that have been disposed of or converted into PBV units. This activity will allow households paying public housing flat rents to continue to pay such rents or transitional higher rents that remain below 30% of their adjusted incomes.</p> <p>For pro-rated households who otherwise would see a significant rent increase, this activity allows SAHA related-entity owners of the PBV units to request lower contract rents for those families' units without affecting rent comparability for other units at the developments; and, allows utility allowances consistent with the utility allowances the households were paying on the units in the public housing program, which may be more or less than the utility allowances that would be paid with respect to such units under the voucher program; and make any other necessary rent or occupancy policy adjustments to provide minimal negative impact to former public housing residents.</p>		
FY2013-1	Time-limited Working Household Preference Pilot Program	Increase housing choices, promote self-sufficiency	<ul style="list-style-type: none"> • Developing tracking system • Implementation planned to correspond with the new online waiting list for PH in Quarter 1 of FY2013-2014.
<p>This pilot project (max 200 households) for public housing residents creates an optional working household waiting list preference to provide time-limited housing assistance. Households who choose to apply under this preference would receive five years of housing assistance, with a two-year extension if needed based on hardship. When this preference becomes available, SAHA will inform waiting list applicants via written notice (letter) describing the preference, emphasizing the time-limited nature of the housing assistance, and providing instructions on how to select the preference. When applicants who have selected this preference are called in from the waiting list, staff will ensure that the applicants understand that a time limit is associated with the preference.</p> <p>Hardship policies mirror FSS practices and policies: SAHA can extend the term of the assistance up to 2 years if the family provides a written request for an extension and SAHA finds that good cause exists for the extension. FSS participation is required -- each FSS family will receive case management services from a FSS Case Manager who maintains close communication with the family and works with them to develop an Individual Training and Service Plan (ITSP). The ITSP establishes specific interim and final goals to measure the family's progress toward fulfilling its obligations and becoming self-sufficient.</p>			

Activity	Name/Description	Statutory Objective	Update
FY2013-2	Simplified Earned Income Disregard (EID)	Promote self-sufficiency, Reduce cost and increase cost effectiveness	<ul style="list-style-type: none"> • Addressing software system, including: system-generated contracts for escrow accounts and inability to calculate EID without a manual override • Currently researching ability to reconcile various program requirements around escrows and EID
	<p>This activity expands the number of months for which EID is available to participants 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:</p> <ul style="list-style-type: none"> o During year 1, 100% of earned income is disregarded o Year 2: 50% o Year 3: 25% o Year 4: 20% o Year 5: 10% <p>Head, spouse, or co-head of household qualifies entire household (formerly only Head of Household could participate). New FSS participants who use EID would not make use of escrow. Program does not change for current FSS participants, who may continue to use their escrow. The activity is available to both public housing residents and HCV participants. Currently, the HCV program only offers EID to participants who are disabled. The simplified EID would be available to HCV households whose head, spouse, or co-head qualifies as disabled. The simplified EID would be available to all public housing residents.</p>		
FY2013-3	Standardize Section 8 and Public Housing Inspection Process	Reduce cost and increase cost effectiveness	On hold, pending results of HUD tests at other PHAs
	<p>This activity unifies Section 8 and Public Housing inspection standards. The intent is to raise lower standards to a higher, uniform level. It is anticipated that UPCS (public housing) would serve as model for most elements, but some may be derived from HQS (section 8).</p>		
FY2013-4	HQS Inspection of SAHA-owned non-profits by SAHA inspectors	Reduce cost and increase cost effectiveness	Implemented in FY2012-2013 and ongoing.
	<p>SAHA inspectors (instead of 3rd-party contractors) are used to inspect SAHA-owned non-profits and related entities, and to perform rent reasonableness assessments.</p>		

II. General Housing Authority Operating Information

A. Housing Stock Information

Number of public housing units at the end of the plan year

The number of public housing units at the end of the plan year is 6,321 and experienced no changes in public housing units over 10% in this fiscal year.

Description of any significant capital expenditures by development

SAHA is currently working on a comprehensive modernization of Marie McGuire, a senior development with 63 units located in downtown San Antonio, using a total of \$3,171,381.16 out of \$6,572,946.50 total CFP expenditures for FY2013.

Description of any new public housing units added during the year by development

SAHA did not add any new public housing units during this fiscal year.

SAHA's dedication to developing new properties and renovating existing communities continues to increase affordable housing for San Antonio's low-income families. This past year, the agency started construction on Sutton Phase II and began the relocation process for San Juan Phase III – both are mixed-income developments with a total of 460 units. SAHA was also awarded a HUD FY2013 Choice Neighborhood Implementation Grant and is currently planning the redevelopment of Wheatley Courts, a 1940s, 248-unit public housing development.

Number of public housing units removed from the inventory during the year by development

One unit was sold through the Homeownership Program on July 19, 2011, and has been effectively removed from inventory this fiscal year.

The Agency received disposition approval on April 4, 2013 for San Juan Homes (San Juan Phase III). As of July 15, 2013 all 116 PH units were vacated. SAHA broke ground on San Juan Phase III on August 26, 2013.

Number of MTW HCV authorized at the end of the Plan year

SAHA administers 12,776 MTW authorized vouchers and experienced no changes in authorized vouchers over 10% in this fiscal year. The total MTW authorized vouchers includes housing choice vouchers, non-elderly and non-disabled vouchers, and vouchers for homeless individuals and households.

Housing Choice Voucher (HCV) Program- provides rental voucher assistance to households who meet eligibility requirements.

Non-Elderly and Non-Disabled (NED) Voucher Program (awarded prior to 2007) – provides rental voucher assistance to households who are non-elderly and non-disabled. Currently, SAHA has 75 vouchers reserved for these households.

Project-Based Voucher (PBV) Program- provides rental voucher assistance to households that reside at a specific development. SAHA’s non-profit portfolio currently includes 45 affordable mixed-income communities totaling 7,220 units, of which 341 units are public housing. SAHA has a total of 181 committed project-based vouchers.

Set-Aside Voucher Program - provides rental voucher assistance to homeless individuals, through a collaborative referral process. Two local non-profits, The Center for Health Care Services (CHCS) and San Antonio Metropolitan Ministries (SAMM), screens the applicants to ensure they have met all criteria and forwards the applicant packets to SAHA. SAHA places the applicants on the waiting list. Upon selection from the waiting list, applicants are notified by mail to schedule an eligibility appointment. Currently, SAHA has 200 set-aside vouchers authorized. More information on this program is outlined in activity FY2011-9.

Homeless Services Voucher (HSV) Program - provides rental voucher assistance to homeless individuals, through a collaborative referral process. A local non-profit, Haven for Hope, refers applicants to the City of San Antonio after they have resided on the Haven for Hope campus for 30 days. The City of San Antonio screens the applicants to ensure they have met all criteria and forwards the applicant packets to SAHA. SAHA places the applicants on the waiting list. Upon selection from the waiting list, applicants are notified by mail to schedule an eligibility appointment. Currently, SAHA has 400 HSV authorized vouchers.

Number of non-MTW HCV authorized at the end of the Plan year

SAHA administers 878 Non-MTW authorized vouchers, a net reduction of 88 vouchers from FY2012. In FY2013, 88 non-MTW authorized vouchers were removed, as a result of the expiration of the Moderate Rehabilitation Single Room Occupancy Program in December 2012.

In addition to the MTW HCV authorized vouchers, SAHA operates many housing programs through non-MTW vouchers. These special programs serve special populations including those who are homeless, disabled, and/or veterans. SAHA is authorized to administer the following non-MTW vouchers:

Moderate Rehabilitation & Single Room Occupancy (Mod-Rehab & SRO) Program- provides rent subsidy payments to private property landlords for select rental units that have been rehabilitated under this program. Subsidies provide housing assistance to homeless families and individuals as they transition into affordable housing. There are a total of 267 vouchers; all 267 vouchers are for families. In December 2012, the Single Room Occupancy program ended.

Shelter Plus Care (S+C) - provides rental assistance and supportive services for homeless families and individuals with disabilities, primarily those with serious mental illnesses, chronic problems due to alcohol or drug dependencies, and acquired immune deficiency syndrome (AIDS) or related diseases. There are 101 vouchers committed to S+C.

Mainstream – provides rental assistance for elderly and disabled households. Currently, there are 100 vouchers authorized for this program.

HUD-VASH- serves homeless veterans by combining the HCV rental assistance program with case management and clinical services provided by Veterans Affairs medical centers. There are presently 410 families authorized for assistance under this program.

Number of HCV units project-based during the Plan year, including description of each separate project

SAHA has 181 HCV units project-based at the Springhill development. Springhill has a total of 449 units. This local, non-traditional project-based program is an important strategy to increase occupancy at Springhill and preserve affordable housing. Families are selected from the local project-based waiting list based on the availability of units at Springhill. Project-based families must reside at Springhill for two years, after which time the family will be eligible for a Section 8 voucher.

Overview of other housing managed by the Agency, e.g., tax credit, state-funded, market rate

SAHA owns and manages 45 tax-credit and affordable mixed-income housing communities that offer subsidized and/or non-subsidized housing opportunities for moderate-income individuals and families. This portion of the agency's portfolio includes 6,879 units located throughout San Antonio.

Within SAHA’s portfolio, 768 units are subsidized under the Project-Based Assistance (PBA) Program. SAHA’s PBA program units are linked to a particular property in which the owner enters into a contract with HUD under specific terms. Residents pay 30% of their annual adjusted gross income in rent, and HUD subsidizes the remainder. All units subsidized under the PBA program must meet federal housing standards. Tenants receive the rental assistance as long as they live in the building and remain income eligible.

Unit summary of the agency’s PBA inventory

Development	Type	Number of Units	PBA Units
Reagan West Apartments	Family	15	15
Springhill I Apartments	Family	253	143
Springhill II Apartments	Family	196	125
Sunshine Plaza Apartments	Elderly	100	100
Villa De Valencia Apartments	Family	104	74
Pecan Hill Apartments	Elderly	100	100
	Total Units	768	557

B. Leasing Information

Total number of MTW PH units leased in Plan year

In FY2013, SAHA leased 71,512 unit months out of 75,852 total unit months available (94.3% Occupancy). SAHA leased an average of 5,957 units per month. Marie McGuire remains off-line for modernization of 63 units (765 unit months). The units are categorized as “Vacant HUD Approved-Undergoing Mod”. An additional 116 units at San Juan Homes were approved for demolition and as of June 30, 2013, 92 units were vacant.

Total number of non-MTW PH units leased in Plan year

SAHA leased zero non-MTW PH units in this fiscal year.

Total number of MTW HCV units leased in Plan year

In FY2013, SAHA leased 150,372 unit months out of 151,622 total unit months available (99.18% utilization). SAHA leased an average of 12,531 units per month out of a total of 12,776 authorized vouchers as of June 30, 2013.

Program	Total Unit Months	Unit Months Leased	Utilization
MTW*	151,604	150,372	99.18%
NED	900	894	99.33%
Set-Aside	2,400	1,604	66.83%
HSV	4,800	3,740	77.92%
PBV	2,172	709	32.64%

*MTW includes NED, Set-Aside, HSV, and PBV vouchers

Total number of non-MTW HCV units leased in Plan year

In FY2013, SAHA leased 10,050 unit months at 90.84% utilization. SAHA leased an average of 838 units per month.

Program	Total Unit Months	Unit Months Leased	Utilization
MOD	3,732	3,732	100%
SPC	1,212	1,045	86.22%
Mainstream	1,200	1,186	98.83%
HUD-VASH	4,920	4,087	83.07%

Description of any issues related to leasing of PH or HCVs

SAHA is working towards a 95% utilization of non-MTW vouchers. The nature of SAHA's non-MTW voucher programs has presented a few challenges in achieving a higher utilization rate. These vouchers are providing assistance to special populations who are facing a myriad of mental and physical health conditions. Some programs are providing transitional housing and case management, and experience high turnover rates.

During the fiscal year, SAHA applied for shortfall funding which impacted both the Set-Aside and Project-Based vouchers. In addition, the set-aside vouchers are utilized to assist with our homeless population and many participants have difficulties transitioning to permanent housing. In FY2013, the Agency committed 181 PBV to Springhill I & II, a 449-unit affordable housing community in the Agency's non-profit portfolio. The intent of the commitment of PBV was to help stabilize the occupancy of the property. This community has experienced many challenges including occupancy and crime. The Agency is currently assessing this community as part of the Agency's five-year Asset Management Plan for the preservation and expansion of affordable housing as outlined in the recently approved FY2015 MTW Plan.

Number of project-based vouchers committed or in use at the end of the Plan year, describe project where any new vouchers are placed

In FY2013, SAHA committed 181 PBV to Springhill and has currently leased 55 PBV units at Springhill. No new vouchers were placed at other projects. (see **Project-Based Voucher (PBV) Program** above for a description of Springhill).

C. Waiting List Information

SAHA currently maintains separate wait lists for public housing and HCV- both are community-wide. On May 15, 2012 (FY2012), SAHA re-opened the Section 8 Housing Choice Voucher wait list as a new online application process. No major changes occurred for SAHA's wait lists during FY2013.

Public Housing

As of July 29, 2013, SAHA had a total of 15,564 families on the public housing waiting list.

		Accessible Waiting List	Elderly/Disabled Waiting List	Family Waiting List	Total	%
	Totals	470	1,274	13,820	15,564	100%
Race	White	423	1,108	12,316	13,847	89%
	Black/African American	44	141	1,312	1,497	10%
	Asian	0	8	37	45	0%
	Native Hawaiian/Other Pacific Islander	0	2	18	20	0%
	American Indian/Alaska Native	2	8	84	94	1%
	Not Assigned	1	7	53	61	0%
Ethnicity	Hispanic or Latino	386	1,042	11,945	13,373	86%
	Not Hispanic or Latino	83	225	1,822	2,130	14%
	Not Assigned	1	7	53	61	0%
Income Limit	Extremely Low	462	1,236	13,498	15,196	98%
	Very Low	8	34	272	314	2%
	Low Income	0	4	48	52	0%
	Not Assigned	0	0	2	2	0%
Family Composition	Families w Children	56	96	11,202	11,354	73%
	Elderly	45	271	159	475	3%
	Families w Disabilities	368	906	2,451	3,725	24%
	Single	1	1	8	10	0%
Bedroom Sizes	1	360	1,194	6,774	8,328	54%
	2	84	74	3,846	4,004	26%
	3	7	6	2,704	2,717	17%
	4	19	0	466	485	3%

	Accessible Waiting List	Elderly/Disabled Waiting List	Family Waiting List	Total	%
5	0	0	30	30	0%

Note: Percentages are rounded

Housing Choice Voucher Program

As of July 5, 2013, SAHA had a total of 27,783 families on the Section 8 Waiting List.

		HCV	%
	Total	27,783	100%
Race	White	19,073	69%
	Black/African American	7,354	26%
	Asian	153	1%
	Native Hawaiian/Other Pacific Islander	133	0%
	American Indian/Alaska Native	603	2%
	Not Assigned	467	2%
	Ethnicity	Hispanic or Latino	17,728
Not Hispanic or Latino		9,588	35%
Not Assigned		467	2%
Household Type	Disabled	1,748	6%
	Elderly	921	3%
	Families	21,362	77%
	Single	3,752	14%
Family Size	1-3	21,718	78%
	4-6	5,703	21%
	7-9	344	1%
	10 or more	18	0%

Note: Percentages are rounded

III. Non-MTW Related Housing Authority Information (optional)

A. List planned vs. actual sources and uses of other HUD or other Federal Funds (excluding HOPE VI)

Not Applicable.

B. Description of non-MTW activities implemented by the Agency

Supportive Housing

In addition to MTW housing programs, SAHA offers affordable housing linked to accessible supportive services, including mental health, substance addiction, employment, and other support services that provide assistance for families and individuals to live more stable, productive lives. Supportive housing works particularly well for those facing complex life challenges, such as homelessness, HIV/AIDS, prison or jail release, and/or mental illness.

SAHA is committed to reducing homelessness in San Antonio through programs that provide affordable quality housing for homeless individuals and families. In an effort to provide quality assistance, the agency partners with non-profit organizations and Continuum of Care (CoC) that offer services to address issues that affect client quality of life. (See **section II. A. “Number of non-MTW HCV authorized at the end of the plan year”** for a brief description of the agency’s non-MTW supportive housing programs.)

Homeownership Program

By partnering with local banks and mortgage lenders, SAHA has been able to offer two additional homeownership programs outside of Section 8: Section 24 and Section 32. All programs offer homebuyer counseling and assistance with down payment and closing costs.

- The Section 24 homeownership program helps low- to moderate-income families purchase townhomes at a designated SAHA development, Artisan Park Townhomes. This program is open to SAHA residents as well as the general public. Currently, there are five affordable townhomes remaining for sale.
- The Section 32 homeownership program helps first-time, low- to moderate-income families purchase SAHA-owned homes. This program is open to SAHA residents as well as the general public. This fiscal year, SAHA plans to sell the four remaining affordable townhomes. SAHA also plans to utilize Section 32 to sell the 85 homes located in four of the five “Mirasol” HOPE VI neighborhoods (i.e., Blueridge, Palm Lake, Sunflower, Villas de Fortuna) following renovation and reconstruction.
- The Sections 24 and/or the 32 homeownership programs may be utilized in the development of affordable homes on Leigh Street at the Victoria Commons site.

IV. Long-term MTW Plan (Optional)

On June 25, 2012, the Board of Commissioners formally approved SAHA's new Strategic Plan. The core of the plan has three elements: 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. At the same time, "Leverage MTW designation to transform core operations" is a specific objective under Goal 5 ("Transform core operations") of the Strategic Plan. Finally, at the Action level, each MTW Activity is directly incorporated into the Strategic Plan as a specific action item. Because of the tight integration between the plans, progress in any MTW Activity is automatically captured in Strategic Plan progress reports.

SAHA is currently developing a Strategic Plan Dashboard that would simplify tracking of plan progress. The Dashboard would quantify actionable metrics and show activity status on a series of online displays.

SAHA is also performing an internal Control Self-Assessment (CSA) to identify objectives, risks, and controls in the MTW Plan/Report process. The goal is to improve the efficiency and effectiveness of the process that goes into developing the MTW plan and related

MTW report. The final report for the CSA was issued to the Present and CEO on September 11, 2013. SAHA looks forward to implementing the CSA recommendations as early as the next MTW Plan cycle.

V. Proposed MTW Activities:

Describe any activities that were proposed in the Plan, approved by HUD, but not implemented, and discuss why these activities were not implemented.

FY2013-1 – Time-limited Working Preference Pilot Program

Statutory Objective: Increase housing choices, Promote self-sufficiency

Description: This pilot project (max 200 households) for public housing residents creates an optional working household waiting list preference to provide time-limited housing assistance. Working households who choose to apply under this preference would receive five years of housing assistance, with a two-year extension if needed based on hardship. Elderly or disabled are eligible for the optional working household preference regardless of work status.

When this preference becomes available, SAHA will inform waiting list applicants via written notice (letter) describing the preference, emphasizing the time-limited nature of the housing assistance, and providing instructions on how to select the preference. When applicants who have selected this preference are called in from the waiting list, staff will ensure that the applicants understand that a time limit is associated with the preference.

Hardship policies mirror FSS practices and policies: SAHA can extend the term of the assistance up to 2 years if the family provides a written request for an extension and SAHA finds that good cause exists for the extension. FSS participation is required -- each FSS family will receive case management services from a FSS Case Manager who maintains close communication with the family and works with them to develop an Individual Training and Service Plan (ITSP). The ITSP establishes specific interim and final goals to measure the family's progress toward fulfilling its obligations and becoming self-sufficient.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Increase the number of households selecting the working preference	Number of qualified households selecting this preference	0	200	Preparing to Implement
Reduce the average time spent on housing assistance	Average time spent on assistance	0	5 years	Preparing to Implement

Increase the average income of participating households	Average income of participating households	\$10,300	10% increase by end of participation	Preparing to Implement
Provide continued support to households experiencing hardships for families	Rate of hardship requests	0	5% of number of participants	Preparing to Implement
Increase the average length of employment	Average length of term of employment	0 months	June 30, 2013: 6 months June 30, 2014: 12 months	Preparing to Implement

Challenges: The Time-limited Working Preference Pilot Program will be implemented in conjunction with the On-Line Waiting System currently scheduled to go into effect during the first quarter of the next reporting period.

Data Collection Methods: Data collection for this activity will use Elite live database to track households on waiting lists, and Tracking at a Glance (TAAG) database to track case management. Contracts, extensions, needs assessments, case notes are documented in Elite. ITSP, referrals, milestones, needs assessment, and case notes are documented in TAAG. The information is captured in multiple systems to facilitate access by staff who only have access to one system.

Authorizations: *MTW Agreement Attachment C, Section B(4) (Transitional/Conditional Housing Program), Section C(2) (Local Preferences and Admission and Continued Occupancy Policies and Procedures), Section C(5) (Use of Public Housing as an Incentive for Economic Progress), Section C(11) (Rent Policies and Term Limits), Section D(2) (Rent Policies and Term Limits, specifically Section D(2)(d) authorization to implement term limits for MTW HCV units), and Section D(4) (Waiting List Policies).*

FY2013-2 – Simplified Earned Income Disregard (EID)

Statutory Objective: Increase housing choices, Promote self-sufficiency, Reduce cost and increase cost effectiveness

Description: This activity expands the number of months for which EID is available to participants 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: 50%
- Year 3: 25%
- Year 4: 20%
- Year 5: 10%

Head, spouse, or co-head of household qualifies entire household (formerly only Head of Household could participate). New FSS participants who use EID would not make use of escrow. Program does not change for current FSS participants, who may continue to use their escrow. The activity is available to both public housing residents and HCV participants. Currently, the HCV program only offers EID to participants who are disabled. The simplified EID would be available to HCV households whose head, spouse, or co-head qualifies as disabled. The simplified EID would be available to all public housing residents.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Increase number of households participating in EID	Number of households participating in EID	40	80	Preparing to implement
Increase average income disregarded	Amount of income disregarded (average per year)	\$11,000	\$12,100	Preparing to implement

Increase number of members per households participating in EID	Number of household members who take advantage of disregard (average)	1 (head of household)	1.5 per household	Preparing to implement
Increase average length of employment among participants	Average length of time participants are employed during 60 months	0	40 months	Preparing to implement

Challenges: SAHA has experienced several challenges in implementing this activity. Currently, SAHA is addressing software needs including: system-generated contracts for escrow accounts and inability to calculate EID without a manual override. Also, SAHA is researching the ability to reconcile various program requirements around escrow and EID.

Data Collection Methods: Data will be collected using Elite live database once adjustments have been made.

Authorizations: *MTW Agreement Attachment C, Section B (1) (Single Fund Budget with Full Flexibility), specifically Section B (1) (b) (iii) referencing the provision of housing or employment-related services or other case management activities, and Section C (11) (Rent Policies and Term Limits) authorizing agency to establish earned income disallowances that differ from those in current statutes or regulations.*

FY2013-3 – Standardized Section 8 and Public Housing Inspection Processes

Statutory Objective: Reduce cost and increase cost effectiveness

Description: The activity has been put on hold. HUD is currently reviewing HQS and UPCS guidelines to establish a uniform inspection process for both programs.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Produce a final standards and procedure manual	Final standards and procedures manual	None	Completion by May 1, 2013	On Hold
Reduce failure rate	Failure rate	TBD by research completed during production of standards and procedures manual		On Hold
Reduce the number of re-inspections	Number of re-inspections of HCV units during transition period (June – Oct 2013)			On Hold
Reduce the number of re-inspections	Number of re-inspections of HCV units after transition period (Oct 2013 – June 2014)			On Hold
Increase landlord participation	Landlord participation			On Hold

Challenges: None.

Data Collection Methods: During the first year of this activity, data collection will be focused on research on best practices, communication with other agencies, establishment of SAHA priorities, and collaboration with partners, including landlords, to develop the new set of standards. Data will also be gathered from existing SAHA databases and other internal records to establish baselines that are meaningful to both public housing and HCV.

Authorizations: *MTW Agreement Attachment C, Section C (9) (Simplification of Property Management Practices) and Section D (5) (Ability to Certify Housing Quality Standards).*

VI. Ongoing MTW Activities

FY2011-1 - Block Grant Funding with Full Flexibility

Statutory Objective: Increase Housing Choices

Description: SAHA combines the Public Housing Operating Subsidy, Capital Fund Grants, and Housing Choice Voucher Program Subsidy under a single fund block grant effective July 1, 2010. This activity tracks the statutory requirements to serve the same number of households by household size with at least 75% of households being very low income (below 50% AMI). Block grant funding is no longer required by HUD to be tracked as a MTW activity. SAHA will continue to monitor the progress of the funding flexibility by tracking the number of households served by family size and AMI in the new 50900 Attachment B Section II.5.B. Leasing Information starting in FY2013-2014 Report and FY2014-2015 Plan.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Maintain Proportion of households served that are below 50% AMI	Percentage of households served under MTW below 50% AMI	The percentage of residents served pre-MTW below 50% AMI	SAHA will continue to serve the same # of households by household size and at least 75% will be very low income	As of June 30, 2013 (pulled on July 1, 2013) HCV: 98% (12,445) As of June 30, 2013 (pulled on July 8, 2013) PH: 98% (5,770)
Assist substantially the same number households or more with MTW as baseline and benchmark	# of households assisted	The # of households pre-MTW +/- changes in housing stock or programs unrelated to MTW	SAHA will continue to assist substantially the same number of households with MTW as baseline.	As of June 30, 2013 (pulled on July 1, 2013) HCV: 12,741 As of June 30, 2013 (pulled on July 8, 2013) PH: 5,905

Public Housing Households Served: Households below 80% AMI								
FY2013 Income Limit Bexar County	No. of Persons							
	1	2	3	4	5	6	7	8 or more
Extremely Low-Income (<30%)	\$12,900	\$14,750	\$16,600	\$18,400	\$19,900	\$21,350	\$22,850	\$24,300
	2334	654	783	673	342	170	65	24
Very Low-Income (30% to < 50%)	\$21,500	\$24,550	\$27,600	\$30,650	\$33,150	\$35,600	\$38,050	\$40,500
	250	174	122	88	53	19	9	10
Low Income (50% to < 80%)	\$34,350	\$39,250	\$44,150	\$49,050	\$53,000	\$56,900	\$60,850	\$64,750
	29	37	21	17	7	6	2	1

MTW Voucher Households Served: Households below 80% AMI								
FY2013 Income Limit Bexar County	No. of Persons							
	1	2	3	4	5	6	7	8 or more
Extremely Low-Income (<30%)	\$12,900	\$14,750	\$16,600	\$18,400	\$19,900	\$21,350	\$22,850	\$24,300
	3,675	1,535	1,742	1,539	981	462	157	115
Very Low-Income (30% to < 50%)	\$21,500	\$24,550	\$27,600	\$30,650	\$33,150	\$35,600	\$38,050	\$40,500
	426	560	498	380	207	112	34	22
Low Income (50% to < 80%)	\$34,350	\$39,250	\$44,150	\$49,050	\$53,000	\$56,900	\$60,850	\$64,750
	19	77	84	49	31	19	3	4

Challenges: None. SAHA has met the benchmarks in both metrics. SAHA will continue to monitor the variations in households by household size to ensure the agency serves substantially the same number of households as the MTW baseline.

Data Collection Methods: For Public Housing, a 50058 Ad Hoc report was pulled on July 8, 2013 for PIC occupancy as of June 30, 2013. For Housing Choice Voucher Program, an Active Participant report was pulled on July 1, 2013 from an internal live database used for Voucher Management System (VMS) reporting to reflect active residents as of June 30, 2013. Both reports were then aggregated to track households by household size and AMI category.

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility).*

FY2011-1a – Promote Education through Partnerships

Statutory Objective: Promote self-sufficiency

Description: This activity has grown from one partnership to many, expanding the potential number of participants and the scope of activities. The activity remains focused on promoting education through any and all available partnerships.

Because this activity only utilizes the block grant funding waiver in the MTW agreement, HUD no longer requires it to be tracked as an activity. Starting in FY2013-2014 Report and FY2014-2015 Plan, it will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds.

Impact	Metrics	Baseline	Benchmark	FY2013 Results
Increase High School completion rate	High School Diploma Completion	0 Participants	50 participants will complete high school or receive their GED by end of year 1	58 adult residents received GED/HSD (Jobs-Plus=9; FSS=49)
Increase certification completion rate	Certificate Completion	0 Participants	25 participants will complete certificates by end of year 2	217 adult residents completed certification courses (Jobs-Plus= 157; FSS=60)
Increase job training	Job Training Completion	0 Participants	25 participants will complete job training by end of year 2	333 have completed training (Jobs-Plus= 157; FSS = 176)

Challenges: Some of the challenges include motivating residents to pursue education first vs. pursuing a job that will help with their living expenses. Many residents prefer to be enrolled in a program where they can “earn while they learn,” and such programs are limited. A challenge for the near future includes legislation that will affect the cost and academic intensity of the GED certification. Effective January 1, 2014, the costs will increase, and the curriculum and test will be considerably harder. Staff is attempting to find alternative certifications that are acceptable to potential employers.

Data Collection Methods: TAAG database, and FSS monthly reporting spreadsheets.

Authorizations: MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility), specifically Section B1 (b) (iii) referencing the provision of housing or employment-related services or other case management activities.

FY2011-1c – Holistic Case Management Model

Statutory Objective: Promote self-sufficiency

Description: The holistic case management model is designed to address barriers to employment for housing program residents and participants. Case Management is provided under the FSS Program, the Elderly/Disabled Services (EDS) Program, and the Jobs-Plus program.

Because this activity only utilizes the block grant funding waiver in the MTW agreement, HUD no longer requires it to be tracked as an activity. Starting in FY2013-2014 Report and FY2014-2015 Plan, it will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds.

Currently there are 23 case managers providing FSS enrollment, holistic case management, special program administration, and social service assistance to property management. Thirty-seven (37) public housing properties and all HCV households have assigned case managers. Some of the achievements of this activity are:

Individuals were referred to programs and/or received services:

- 123 individuals were assisted with bus passes
- 41 individuals received Money Smart counseling
- 25 individuals received an EIF scholarship
- 221 children are enrolled in a YMCA after-school program
- 53 families out of 87 referred, received child care services
- 171 families out of 231 referred, received utility assistance
- 824 families out of 1,042 referred, received assistance for rental assistance/government assistance programs/food
- 76 families out of 157 referred, received health services
- 1,002 families received Christmas gifts from Elf Louise
- 41 families received Thanksgiving turkeys from Rackspace

Opportunities and Events:

- Over 500 individuals attended the Father's Day event
- Over 900 residents attended the annual Golden Gala

- Over 600 residents attended the REACH Awards (250 students recognized for academic achievement)
- 30 communities received Wi-Fi services in the community rooms
- 5 learning centers were established
- 1,965 individuals participated in National Night Out activities
- 90 individuals participated in the Tobacco Kick Butts event
- 395 individuals have been awarded bicycles through the Pedaling Your Way to Fitness program
- 6 individuals participated in the FSS Rap Session
- 75 individuals participated in the Summer Youth Employment Program
- 1,426 individuals participated in Back-to-School Event activities
- 77 individuals participated in literacy programs
- 58 individuals participated in Girl Scouts
- 40 individuals participated in CAMP Flaming Arrow
- 30 individuals participated as officers in their respective Resident Council
- 16 individuals have been employed as Resident Ambassadors

Impact	Metrics	Baseline	Benchmark	FY2013 Results
Increase the number of families receiving case management	Number of families receiving Case Management	2,335 families HCV FSS – 408 PH FSS – 405 PH EDS – 1,522 Jobs-Plus – 0	By the end of year 2, an increase of 100 families not currently served under FSS/EDS/Jobs-Plus	3,246 Total HCV FSS – 538 PH FSS – 378 PH EDS – 1,822 Jobs-Plus – 508
Increase the number of families participating in self-sufficiency activities	Number of families participating in a self-sufficiency activity related to job training, employment, or education.	813 families HCV FSS – 408 PH FSS – 405 Jobs-Plus – 0 Other – 0	An increase of 100 families will be participating in a self-sufficiency activity defined as being related to job training, employment, or education	1,467 Total HCV FSS – 538 PH FSS – 378 Jobs-Plus – 508 Other – 100 (57 are also enrolled in Jobs Plus or FSS) Resident Ambassadors: 16 Summer Youth Employment Program: 75 Community Coaches: 4 Project Storm: 5

Challenges: While there has been a significant increase (80%) in enrollment into self-sufficiency programs, there are some challenges to ensuring that families become self-sufficient: limited resources to help address barriers to employment (child care, support services for tools, clothing and other items), low educational attainment (population with 6-8th grade education) that requires intense case management, lack of structured paths to careers, and lack of tiered system of services and other issues. Another big challenge is ensuring that increases in family income can be used to build assets and financial stability before their rent increases.

One of the strategies to address some of these issues is to execute the “Path to Self-Sufficiency/Early Engagement” MTW activity to engage residents from the inception of coming into the SAHA system. This initiative will develop curriculum to address the most common issues that result in problems for residents (budgeting, financial literacy, conflict resolution, etc.). It will also provide access to partner services for residents and will introduce workforce development and educational partners to residents. The goals of the initiative include reducing the number of crises families encounter by helping them become “successful residents,” initiating the discussion of self-sufficiency from the inception, and creating a “new housing experience” centered around accountability and temporary dependence on public assistance. SAHA will be assessing residents to provide access to services by engaging partners early and connecting residents to structured training that leads to career paths.

Data Collection Methods: Tracking at a Glance (TAAG) database, Elite live database, and FSS monthly reporting spreadsheets

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility), specifically Section B1 (b) (iii) referencing the provision of housing or employment-related services or other case management activities.*

FY2011-1d – Resident Ambassador Program

Statutory Objective: Promote self-sufficiency

Description: The resident ambassador program encourages resident participation in outreach and promotion for education, job-training, employment, and community building activities. The ambassadors’ purpose is to inform and motivate fellow residents to participate in self-sufficiency activities.

Because this activity only utilizes the block grant funding waiver in the MTW agreement, HUD no longer requires it to be tracked as an activity. Starting in FY2013-2014 Report and FY2014-2015 Plan, it will be reported in the new Form 50900 Attachment B Section V.3. Sources and Uses of Funds.

Under this activity, residents were provided with a stipend for the following activities:

- Promoting self-sufficiency activities
- Co-organizing community building events
- Providing grassroots outreach by distributing flyers and talking with neighbors
- Serving as mentors to other residents

Impact	Metric	Baseline	Benchmark	FY2013 Results
Encourage resident participation while providing employment opportunities	Number of resident ambassadors	0 Participants per selected property	Recruit 5-7 residents per property to become ambassadors	16 Total: Cassiano Homes and Lincoln Heights: 2 each Charles Andrew, Cross Creek, Highview, Mission Park, Refugio, Riverside, San Juan, Springview, Sutton, Villa Veramendi, Wheatley, West Way: 1 each
Encourage resident participation while providing employment opportunities	Number of community coaches	0 Participants	Recruit and maintain 6 Coaches at Alazan and 4 Coaches at Mirasol	Alazan: 2 Mirasol: 2

Challenges: In order to address capacity development, the Resident Ambassadors were tasked with organizing the annual Father's Day event in June 2013. Staff developed a curriculum that addressed issues such as marketing, outreach, organizing, and other topics. Resident Ambassadors attended 10 classes and successfully organized and executed the 2013 Father's Day Event. Challenges include identifying residents who are both interested in the RA position and capable of successfully completing the Human Resource hiring process which includes a background check and drug test.

Data Collection Methods: Tracking at a Glance TAAG database, Elite live database, and FSS monthly reporting spreadsheets

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility), specifically Section B1 (b) (iii) referencing the provision of housing or employment-related services or other case management activities.*

FY2011-1e – Preservation and Expansion of Affordable Housing

Statutory Objective: Increase housing choices

Description: 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. Multiple financing sources will be used to achieve the goals for preservation and expansion. Capital improvements to existing properties will be made to extend the life of a property, improve livability, and decrease operating expenses. Expansion will be done in areas that achieve multiple community goals and include deeply subsidized housing.

As such, SAHA proposed to utilize MTW’s flexible use of funds to preserve and expand housing for low-income families. SAHA has many development activities currently underway, which are outlined above in **Section VII.H. New Development**.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Increase housing choices	Number of public housing units replaced for other low-income housing units.	0 public housing units replaced or other low-income housing units produced using MTW funding flexibility	By the end of year 2, produce 300 replacement public housing or other low-income housing units	Zero units were completed in FY2013; however, SAHA produced a total of 247 units in the first two years of this activity. In FY2014, 49 PH units at the Park at Sutton Oaks (Sutton Phase II) will be added and in FY2015, 63 PH units at San Juan Phase III will be added.

Challenges: None.

Data Collection Methods: Data on the completion of new units/developments will be collected on a standard format and tracked in a central location via computer. The timing of future projects’ planning and construction phases will also be tracked.

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility), specifically Section B1(b)(ii) referencing the acquisition, new construction, reconstruction or moderate or substantial rehabilitation of housing, and Section B1(b)(vii) referencing the preservation of public housing and/or Housing Choice Voucher units; MTW Agreement Attachment D (Use of MTW Funds for Local, Non-Traditional Activities).*

FY2011-3 – Biennial Recertification for Public Housing Elderly/Disabled on 100% Fixed Income

Statutory Objective: Reduce cost and increase cost effectiveness

Description: All PH participants of the San Antonio Housing Authority must complete an annual recertification. Documentation shows that elderly and disabled participants experience minimal income changes each year. Typically the only change is a result of a cost of living increase from the Social Security Administration. The inconvenience to the elderly and disabled residents for these annual reviews may pose a physical burden as well as take up valuable staff time. SAHA proposed to conduct biennial recertification for elderly/disabled PH participant households on 100% fixed income. SAHA may initially use random selection methods and tools to select elderly and disabled participants in scheduling recertifications. Half of the PH participants will be on a two-year recertification cycle starting in the first year and the remainder will be on a two-year cycle starting in the second year of program implementation. Every participant will have the option of interim recertification at any time if there is a change in income or an increase in medical expenses. Modifying the recertification practice of PH participants to once every two years will allow staff more time to provide much-needed case management services to elderly and disabled residents and to focus on customer service initiatives. This fiscal year, there were a total of 875 biennial participants.

Impact	Metrics	Baseline	Benchmark	FY2013 Results
Reduce staff hours for recertifications	Hours to complete recertification	5,890 staff hours to complete annual recertification	Staff hours reduced by 2,946 hours	Staff hours reduced by 1,750 hours
Reduce cost of recertification	Cost reduction on recertification process	\$91,295.00 annual cost on recertification process	Cost reduction by \$45,663.99 in year 1 of implementation	Cost reduction by \$27,125.00

Challenges: SAHA continues to add eligible tenants to the biennials list. When initially started, this program erroneously missed several eligible participants that would have otherwise been included in the initial year and the year after. Since these eligible participants were initially skipped, they were then captured during the second year. This created a disproportionate participant count from year one to year two. The 875 participants represent the initial round of biennial participants that did not include the eligible missed group. Of the 2,588 total biennial participants, only 875 were included as a savings for this reporting period. The remaining 1,713 participants should be included in the count for the following reporting period ending June 30, 2014. This total

would exceed the \$45,663.99 benchmark. In FY2011-2012, SAHA reported a cost savings of \$48,918. The actual total cost savings of \$24,459 was inadvertently doubled in the calculations.

Data Collection Methods: SAHA interviewed staff to estimate the amount of time it takes to process a recertification. The conclusion was an average time of 2 hours to process each recertification. The baseline and benchmark for the cost of recertification was derived using the estimated 2 hours of staff time and the salary for Community Managers and Customer Service Specialists. SAHA will estimate annual results based on the number of recertifications completed. The agency will re-evaluate the data collection method of this metric within the next fiscal year to ensure that it is the most effective and efficient way to track staff hour savings and cost savings related to recertifications.

Authorizations: *MTW Agreement Attachment C, Section C4 (initial, Annual and Interim Income Review Process)*

FY2011-4 - Streamline Methods of Verification for Public Housing and HCV

Statutory Objective: Reduce cost and increase cost effectiveness

Description: While continuing the mandatory use of the Enterprise Income Verification (EIV) report, HCV staff transitioned from the use of third-party verification of income from employers to the use of participant-provided documents. SAHA continues to use oral verifications and/or mailed third-party verification in the event of a discrepancy or if documents appear altered. The agency also employs quality control measures to randomly select participant accounts and requires additional verification to ensure the integrity of the verification process. Third-party verification of assets is still required for assets totaling a value of \$25,000 or more.

Many participants were revisiting SAHA to drop-off requests for additional information to complete their recertification. By accepting participant-provided documents, SAHA is able to process recertifications in a timelier manner. Prior to streamlined methods of verification, third-party verifications had to be mailed and/or the family had to revisit SAHA to drop off additional documentation. Below is a list of the most frequently requested items. Currently, many families are utilizing fax and mail to submit requests for additional information versus coming into the lobby.

- Employment check subs
- Bank Statements
- Absent adult members
- Request for Tenancy Approval (RTA)
- Lease Non Renewals
- Prescription statements

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Reduce the number of office visits due to requests for additional documentation	Number of requests for additional documentation	13,000 requests for additional documentation	Reduce requests for additional documentation to 12,000	Requests for additional documentation reduced to 6,139. Not Implemented for PH

Challenges: SAHA’s intent for this activity was to minimize barriers for applicants and to reduce the amount of staff time associated with document verification.

During the first two quarters of this fiscal year the HCV department had several staff vacancies which affected quarters 1-3. In October 2012, SAHA hired nine new staff members who completed their training in February 2013. Their first appointments were March 2013 for July 2013 recertifications. Therefore, many of the previous files were incomplete, and/or needed additional documentation. In addition, a number of participants did not bring the required documentation to their recertification appointment and not all adult members were present. SAHA has contracted with a third-party vendor to assist with recertification, should the department experience a large number of vacancies in the future.

Public housing did not implement this activity. SAHA will combine FY2011-4 and FY2011-5 activities in FY 2014-1 for HCV only.

Data Collection Methods: Currently, SAHA staff track the number of office visits manually. The agency is re-evaluating this data collection method and intends to develop an electronic tracking system for office visits.

Authorizations: *MTW Agreement Attachment C, Section C4 (Initial, Annual and Interim Income Review Process) and Section D3 (Eligibility of Participants).*

FY2011-5 - Requirements for Acceptable Documents for Public Housing and HCV

Statutory Objective: Reduce cost and increase cost effectiveness

Description: SAHA has revised its policy to extend the length of time that applicant/participant-provided documents would be valid for verification purposes. Applicant-provided documents dated within 90 calendar days from the eligibility appointment and participant-provided documents dated within 180 calendar days, from the recertification appointment would be valid. This does not apply to permanent documents, such as social security cards, birth certificates, and identification cards.

Impact	Metric	Baseline	Benchmark	FY2013 Result
Reduce the number of office visits due to requests for additional documentation	Number of requests for additional documentation	13,000 requests for additional documentation	Reduce requests for additional documentation to 12,000	Requests for additional documentation reduced to 6,139 Not Implemented for PH
Increase the number of files completed within a timely manner	Number of files completed within 30-45 days of recertification effective date	Recertifications Annual: 12,571 Interim: 4,800	Recertifications Annual: 12,571 Interim: 4,800	HCV FY13 Recertifications Annual: 5,143 out of 10,174 (51%) Interim: 4,715 out of 6,019 (78%) Not Implemented for PH

Challenges: See FY2011-4 for explanation.

Data Collection Methods: Currently, SAHA staff tracks the number of office visits manually. The agency is re-evaluating this data collection method and intends to develop an electronic tracking system for office visits. Recertifications are tracked using Elite live database. Reports are pulled using timestamps to calculate timely recertifications. SAHA is developing a method to track recertifications that are completed in a timely manner as a result of this activity.

Authorizations: *MTW Agreement Attachment C, Section C4 (Initial, Annual and Interim Income Review Process) and Section D3 (Eligibility of Participants).*

FY2011-6 - Commitment of PBV to SAHA-owned or Controlled Units with Expiring Subsidies

Statutory Objective: Increase housing choices

Description: SAHA proposed to commit PBV to (1) a development in its affordable mixed-income housing portfolio, and/or (2) privately-owned developments with expiring subsidies, where the commitment of PBV would preserve low-income housing opportunities. SAHA has taken initial steps toward committing PBV to a development in its affordable mixed-income housing portfolio, including:

- Received environmental review form the City of San Antonio and approval from HUD on August 29, 2011
- Engaged CGI Federal to conduct site assessment to establish initial rents and determine rent reasonableness
- Conducted inspections and eligibility screenings for vouchers in October 2011

The commitment of PBV in privately-owned developments with expiring subsidies will be made through a competitive process that takes into account location and size of units, amenities or services provided, and management record of the owner.

Impact	Metric	Baseline	Benchmark	FY2013 Result
Increase affordable housing	Number of PBV committed to SAHA affordable housing portfolio.	Zero committed to SAHA affordable housing portfolio. SAHA will monitor the number of PBV units converted to affordable housing portfolio	Up to 181 PBV committed to Springhill Apartments in the first year	As of June 2013, a total of 55 units leased
Increase the number of PBV committed to developments with expiring subsidies	Number of PBV committed to developments with expiring subsidies	Zero PBV committed to developments with expiring subsidies. SAHA will monitor the number of PBV units committed to developments with expiring subsidies	Up to 50 PBV committed to developments with expiring subsidies in the first year, depending on need and merits of proposals	NA

Challenges: SAHA has evaluated the need of PBV at other properties and plans to revise this activity to include other communities within SAHA’s portfolio. As a result, no PBV were committed to developments with expiring subsidies.

In FY 2013-14 SAHA proposes to increase the number of PBV-committed units in new developments in its affordable mixed-income housing portfolio. The number of units committed will not exceed 250.

Data Collection Methods: SAHA tracks the leasing of PBV units using Elite live database.

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility) and Section D7a and D7c (Establishment of an Agency MTW Section 8 Project-Based Program)*

FY2011-7 - Remove the Limitation on Commitment of PBV so that PBVs May Be Committed to More Than 25% of the Units in Family Developments without Required Provision of Supportive Services

Statutory Objective: Increase housing choices

Description: This activity was to be used in conjunction with activity FY2011-6, and would allow SAHA to commit PBV to developments for families in amounts greater than 25% of the units. This will help to preserve affordable housing and provide additional low-income housing opportunities. SAHA may offer some supportive services for these developments, but needs the flexibility not to offer such services for every unit where PBV will be committed. Steps were taken during the first plan year to prepare for implementation of this activity, including securing HUD approvals, securing environmental reviews, and engaging a third-party contractor to establish contract rents.

Impact	Metric	Baseline	Benchmark	FY2013 Result
Preserve affordable housing and provide additional low income housing opportunities	Number of units project-based above 25% in non-elderly/disabled developments	0	Springhill Total Units: 449 PBV Committed: up to 181	68 units project-based above 113 (25% of total)- 55 leased
Among families living in PBV committed units, maintain relative average family earned income	Average earned income of PBV families to which the exception is applied, relative to others in the same developments	PBV Average family income: \$6,520	Average earned income of PBV families not offered supportive services should be equal or greater than that of other PBV families who were offered supportive services	N/A – the exception was not applied during this fiscal year

Challenges: A third-party management company has been obtained to address the financial and occupancy concerns at Springhill. The management company has begun to address some critical areas of operations, including working with the community, law enforcement, neighbors and local businesses to develop stronger alliances needed to address crime and vagrancy in the surrounding area. The overarching mission of management is to improve resident retention, reduce turnover, and lower vacancy rates.

The third-party management at Springhill has hired a service coordinator to assist in providing services to all the residents at the property; therefore, SAHA did not use the exception for supportive services. As a result, a comparison of the average earned income among PBV units that were offered supportive services and those were not offered supportive services is not available. SAHA

intends to use the exception for supportive services for future PBV-leased units at other developments in the agency's nonprofit portfolio. A continuation of this activity is vital as SAHA moves toward 100% occupancy of the current PBV-committed units as well as future PBV-committed units.

In FY 2013-14 SAHA proposes to increase the number of PBV-committed units in new developments in its affordable mixed-income housing portfolio. The number of units committed will not exceed 250.

Data Collection Methods: SAHA tracks the leasing of PBV units and family income using Elite live database.

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility), Section D1e (Operational Policies and Procedures), and Section D7a and D7c (Establishment of an Agency MTW Section 8 Project-Based Program).*

FY2011-8 - Revise Mobility Rules for PBVs

Statutory Objective: Increase housing choices

Description: SAHA proposes that PBV households have priority for the first available tenant-based voucher after two years, rather than one year, of occupancy. This would assist efforts to stabilize occupancy at the first development where PBV will be committed, the Springhill development, as well as other developments where SAHA may commit PBV units. Steps were taken during the first plan year to prepare for implementation of this activity, including securing HUD approvals, securing environmental reviews, and engaging a third-party contractor to establish contract rents.

Impact	Metric	Baseline	Benchmark	FY2013 Result
Stabilize occupancy rate at PBV developments	Move-out rate of PBV units	Zero PBV units committed to affordable housing portfolio	Move-out rate after second year is significant, but not so high as to undermine project stability (e.g., 10% range)	Springhill Move Out Rate: 19%
Increase occupancy rate where PBV is committed	Occupancy rate of communities where PBV is committed	FY2011: 67.55% As of June 30, 2011: 69.8%	92-100%	FYE 2013: 79.45% As of June 30, 2013: 78.62% (includes all PBV and non-PBV units at the property)

Challenges: SAHA did not meet the benchmarks for this activity. On July 1, 2012, Springhill was transitioned to a third-party management company to address the financial and occupancy concerns. The management company has begun to address some critical areas of operations, including working with the community, law enforcement, neighbors and local businesses to develop stronger alliances needed to address crime and vagrancy in the surrounding area. The overarching mission of management is to improve resident retention, reduce turnover, and lower vacancy rates.

In FY 2013-14 SAHA proposes to increase the number of PBV-committed units in new developments in its affordable mixed-income housing portfolio. The number of units committed will not exceed 250.

Data Collection Methods: SAHA tracks the move-out rate from PBV units using Elite live database. Property occupancy rates are pulled from Property Management Monthly Financial Statements.

Authorizations: *MTW Agreement Attachment C, Section B1 (Single Fund Budget with Full Flexibility), Section D1b and D1e (Operational Policies and Procedures), Section D4 (Waiting List Policies), and Section D7a and D7c (Establishment of an Agency MTW Section 8 Project-Based Program).*

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

Statutory Objective: Increase housing choices

Description: SAHA will allocate set-aside of tenant-based vouchers for households referred by non-profit sponsors who commit to provide supportive services. The set-aside would be 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).

Impact	Metric	Baseline	Benchmark	FY2013 Result
Increase the number of vouchers committed to nonprofit sponsors who agree to provide services	Number of vouchers committed to nonprofit sponsors who agree to provide services	0 (Zero)	200 vouchers set aside and leased within two years	As of June 30, 2013 CHCS: 81 units leased SAMMS: 83 units leased Total: 164 units
Maintain households served	Percentage Households served that continue to be housed after 2 years	0 (Zero)	90% of households successfully housed after two years	88% of families housed after 18 months

Challenges: SAHA continues to collaborate with our partners to increase utilization for the set-aside program. Due to sequestration and to qualify for short-fall funding, SAHA ceased lease-up activities for all HCV programs, including the set-aside vouchers. SAHA projected a short-fall in CY 2013 funding and, to be eligible for additional funding one of the criteria was to cease all lease-up activity for CY 2013. SAHA should be notified in July 2013 if the agency qualifies for the additional funding.

Data Collection Methods: SAHA tracks the leasing of set-aside vouchers using Elite live database.

Authorizations: MTW Agreement Attachment C, Section D4 (Waiting List Policies).

FY2012-10 – Biennial Recertification for HCV Elderly/Disabled Participants on 100% Fixed Income

Statutory Objective: Reduce cost and increase cost effectiveness

Description: All HCV participants must complete an annual recertification of their family income and composition. SAHA defines fixed income as Social Security (SS), Supplemental Security Income (SSI), and pension. Documentation shows that elderly and disabled participants experience minimal income changes each year; typically, the only change is the result of a cost of living increase from the Social Security Administration (SSA). The inconvenience to the elderly and disabled residents due to these reexaminations may pose a physical burden and result in inefficient use of staff time. Modifying the recertification practice of HCV participants to once every two years will allow staff more time to provide much-needed case management services to elderly and disabled residents and to focus on customer service initiatives.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Reduce staff hours for recertifications	Hours to complete recertification.	5,069 staff hours to complete annual recertification	Staff hours reduced by 2,534 hours	Staff hours reduced by 2,070 hours
Reduce cost of recertification	Cost reduction on recertification process	\$76,592.59 annual cost on recertification process	Cost reduction by \$38,288.74 in year 1 of implementation	Cost reduction by \$31,568

Challenges: HCV experienced no challenges during the implementation of this activity. The activity was implemented in September 2011 for the qualified HCV participants who had recertifications due in January 2012.

Data Collection Methods: The baseline and benchmark for staff hours was estimated using a standard of one staff hour for each recertification of households who are eligible for biennial recertifications. SAHA will use the one-hour estimate and the total number of recertifications to calculate results. Recertifications are tracked using Elite live database. The baseline and benchmark for the cost of recertification was derived using the estimated one-hour of staff time and the average hourly salary. SAHA will estimate annual results based on the number of recertifications completed. The agency will re-evaluate the data collection method of this metric within the next fiscal year to ensure that it is the most effective and efficient way to track staff hour savings and cost savings related to recertifications.

Authorizations: *MTW Agreement Attachment C, Section C4 (Initial, Annual and Interim Income Review Process) and Section D3 (Eligibility of Participants).*

FY2013-4 – HQS Inspection and Rent Reasonableness Assessment of SAHA-owned non-profits by SAHA inspectors

Statutory Objective: Reduce cost and increase cost effectiveness

Description: SAHA inspectors (instead of third- party contractors) would be used to inspect SAHA-owned non-profits and related entities, and will perform rent reasonableness assessments.

Impact	Metrics	Baseline	Benchmarks	FY2013 Results
Reduce inspection cost	Per unit cost of inspections and assessments	\$76.32 per inspection	Reduction of costs by \$55.46 per inspection by December 1, 2012	Total of 1,758 inspections. Cost Savings of \$97,498.68

Challenges: None.

Data Collection Methods: Data collection for this activity will focus on tracking cost metrics, including generating quarterly reports on all internal costs associated with this activity, conducting market research to determine the most up-to-date third-party costs, and comparing those figures to ensure that the agency is still experiencing cost savings.

Authorizations: *MTW Agreement Attachment C, Section B (1) (Single Fund Budget with Full Flexibility), specifically Section B (1) (b) (IV) referencing the provision of management services; MTW Agreement Attachment C, Section C (9) (Simplification of Property Management Practices); and Section D (5) (Ability to Certify Housing Quality Standards).*

VII. Sources and Uses of Funding

A. List planned vs. actual sources (Operating, Capital, and HCV) and uses of MTW Funds (excluding HOPE VI). Provide a narrative description of any major changes from approved MTW Plan

As a block grant agency, SAHA combines Public Housing, Housing Choice Voucher Program and Capital Fund Program (CFP) resources into a single fund with full funding flexibility. The table below details SAHA's planned and actual sources and uses of funds for the fiscal year ending June 30, 2013.

Sources of MTW Funds include the following:

- HCV Block Grant funding from HUD
- Public Housing Operating Subsidy from HUD
- Public Housing Rental and Other Income represents amounts collected from residents of our Public Housing communities for rents and other miscellaneous charges
- Public Housing Capital Grants from HUD
- Replacement Housing Factor Grants from HUD (these funds were included as MTW Sources in the approved 2013 MTW Plan however were not drawn for MTW uses)

Uses of MTW Funds include the following:

- Salaries and Benefits, Repair Maintenance, Utilities, Protective Salaries (Security Services), Insurance, and Other Expenses represent the combined operating costs for Public Housing and Housing Choice Voucher Program.
- HAP Expense for the HCV Program identifies the payments to landlords.
- The CFP funds include activities related to the preservation and expansion of affordable housing.
- Compliance Programs include costs related to the assurance of compliance with federal regulations for all programs which foster self-sufficiency.
- Self-Sufficiency activities include job training, child care training and assistance, transportation assistance, co-location of agencies, training for staff for implementation of holistic case management model, as well as wages for the Resident Ambassador Program.

Proposed Consolidated Sources and Uses of MTW Funds		
Fiscal Year Ending June 30, 2013		
SOURCES		
	Actual	Proposed
HCV Block Grant (HAP & Administrative Fees)	\$96,269,542	\$97,056,575
Public Housing Operating Subsidy	\$19,611,077	\$20,888,863
Public Housing Rental & Other Income	\$12,742,441	\$13,034,793
Public Housing Capital Grants	\$10,111,920	\$10,471,232
Replacement Housing Factor Grants - 2nd Increment	\$1,334,490 ²	\$4,588,690 ¹
TOTAL SOURCES	\$140,069,470	\$146,040,153
USES		
<i>Capital & Other Priorities:</i>		
Public Housing Capital Uses	\$10,111,920	\$10,471,232
Capital Uses of MTW Reserve Funds (net of Self Sufficiency & HCV Activities)	\$0	\$5,000,000
<i>Operations:</i>		
Funding for three priorities (per note 4 below)	\$0	\$5,100,000
Replacement Housing Factor Grants - 2nd Increment (Other MTW uses)	\$1,334,490 ²	\$4,588,690 ¹
Salaries & Benefits	\$14,669,685	\$16,416,478
Repair & Maintenance	\$8,349,998	\$6,397,654
Utilities	\$5,522,369	\$5,782,538
Safety & Security	\$508,829	\$687,897
Insurance	\$999,838	\$1,331,491
Other Expenses (Includes technology/licensing fees, computer/telephone, consulting fees, etc...)	\$4,245,025	\$2,608,692
Management Fees	\$8,737,543	\$9,532,099
HAP Expense for HCV Program	\$87,306,171	\$89,811,678
Compliance Programs	\$180,745	\$213,763
Self-Sufficiency Activities including Grant Matching Funds	\$713,032	\$1,100,000
TOTAL USES	\$142,679,645	\$159,042,212
TRANSFERS, RESERVES & NET INCOME		
MTW Reserve Drawdown/(Buildup)	\$2,610,175	\$13,002,059

Footnote:

¹ Per our discussions with HUD, Second Increment RHF will be used for Public Housing operating costs, Section 8 Housing Assistance Payment expenses so that the RHF obligation deadlines are met. Additional MTW funds will be used by the agency to advance our affordable housing and preservation goals at the San Juan site and other locations.

² HUD notified SAHA that the RHF Fourth Amendment has been finalized.

Note:

On 06/14/2012 the Board of Commissioners approved resolution 5274 which obligated funds consistent with our MTW plan:

1. Section 8 administrative funding shortfall - \$3.1 Million
2. Program administration and implementation of MTW initiatives; increase the number of participants in the PH and HCV FSS and the EID to over 1,200 participants; increase the number of Resident Councils by 10%; establish and expand educational programs for children and adults; explore opportunities to establish and expand health and wellness and arts and culture programs - \$1.1 Million
3. Expansion: Choice implementation matching grant for Wheatley Courts transformation - \$5.0 Million
4. Commit funds to three priorities: - \$5.1 Million
 - a) S8, to ensure levels of service and assistance do not diminish,
 - b) Initiatives to advance our self-sufficiency efforts, and
 - c) Housing preservation and expansion

B. List planned vs. actual sources and uses of State or local funds

SAHA is not a recipient of State or Local Funds.

C. If applicable, list planned vs. actual sources and uses of the COCC

Sources and uses of the COCC include activities related to the management of the Public Housing, Housing Choice Voucher Program, and Capital Fund Programs.

Consolidated Sources and Uses of Central Office Cost Center		
Fiscal Year Ending June 30, 2013		
SOURCES		
	Actual	Proposed
Contract Billing	1,348,920.00	\$1,867,277
Other Revenue	367,579.00	\$278,709
Management Fee	6,187,679.00	\$5,905,079
Bookkeeping Fee	2,019,833.00	\$1,937,139
Asset Management Fee	912,500.00	\$1,114,000
CFP Management Fee	741,033.00	\$741,033
Fee for Service	1,072,298.65	\$1,283,533
TOTAL REVENUE	\$12,649,843	\$13,126,770
USES		
Salaries and Benefits	8,988,536.00	\$10,127,688
Repair & Maintenance	296,400.00	\$281,925
Utilities	237,694.00	\$228,389
Protective Salaries	240,760.00	\$268,417
Insurance	102,486.00	\$191,642
Other Expenses	1,579,667.87	\$2,164,299
TOTAL EXPENSES	\$11,445,544	\$13,262,360
NET INCOME/(LOSS)	\$1,204,299	(\$135,590)

D. If using a cost allocation or fee-for-service approach that differs from 1937 Act requirements, describe the actual deviations

Not Applicable.

E. List or describe planned vs. actual use of single-fund flexibility

SAHA combines the Public Housing, HCV Program and Capital Fund Program resources into a single authority-wide funding source with full funding flexibility. SAHA has used the single fund block grant to provide funding for:

- Operating fund subsidies to the public housing portfolio
- Capital Funds for the public housing portfolio
- HAP payments
- HCV administrative operating costs
- Other MTW Activities
- Development-related activities and planning

F. Optional - List planned vs. actual reserve balances at the end of the plan year

Not Applicable.

G. Optional - In plan appendix, provide planned vs. actual sources and use by AMP

Not Applicable.

H. Initiatives

This section of the MTW report describes other initiatives supported by MTW block grant funding flexibility.

New Development

Currently, SAHA is completing several activities at Sutton Oaks II and San Juan III that will increase the supply of affordably-priced housing in San Antonio by 460 units, of which at least 112 will be units reserved for families at 30% of AMI. As of April 2013, an estimated \$7.0 million in Replacement Housing Factor Funds has been used, as well as other funding resources such as Low Income Housing Tax Credits to finance these developments. Future activities include development and acquisition of new housing, completion of development projects planned within the next two years (including Sutton Oaks II, San Juan III, the build-out of Victoria Commons, and Wheatley Courts, and concept testing for additional projects that may be built in the next three to five years. As of April 2013, an estimated \$7.2 million (i.e., \$4.3 million for San Juan III and \$2.9 million for Sutton II) in Replacement Housing Factor Funds will be used, as well as other funding sources such as Low Income Housing Tax Credits to complete this work. SAHA will be reporting on the total affordable units added in the next fiscal report. Outlined below are the projects positioned for development and acquisition for the 2013-2014 fiscal year.

San Juan III - The third and final phase of the San Juan redevelopment project will include 252 multi-family, mixed-income units consisting of one-, two-, three-, and four-bedroom units. Current plans project that 25% will be public housing, 12.5% will be committed to project based vouchers, and the remainder will be affordable serving families at 60% of AMI or below. This mixed finance project will utilize 4% tax credits and tax exempt bonds, as well as \$4.3 million in Replacement Housing Factor Funds and \$2,200,000 in City HOME funds. In addition, the development will be built to meet Build San Antonio Green (BSAG) Level II certification (comparable to LEED for Homes Certified Silver level home).

Leigh Street Homes - SAHA is pursuing development of up to 26 new construction for-sale single family homes. Some of these homes will be affordable to homebuyers with incomes at 80% AMI to 120% AMI. These homes will comply with the *SAHA Affordable Housing Preservation and Expansion Policy* in that they will comply with Homeownership income limits and meet requirements for a BSAG Level II sustainability certification. SAHA expects the first affordable home closing in summer 2014.

Revitalization of the Five Subdivisions that were part of the HOPE VI Mirasol Project - Mirasol Homes, a 500-unit public housing development located in San Antonio's Westside, was originally constructed in 1953. In 1995, HUD awarded SAHA a \$48.2 million HOPE VI grant to carry out the urban revitalization of the development. Following litigation initiated by SAHA

and multiple parties due to faulty construction, SAHA received \$9 million as part of a settlement. In defining SAHA's use of settlement funds, HUD reiterated SAHA's responsibilities under the HOPE VI grant agreement. SAHA is in the planning phase of a revitalization plan to evaluate, design, and renovate or reconstruct 85 for-sale homes and three vacant lots, and 87 public housing single-family homes to remain public housing units. The for-sale homes will be sold utilizing Section 32 affordability guidelines. Construction is expected to begin in 2014.

Choice Neighborhoods Initiative- In March 2012, SAHA was awarded a \$250,000 U.S. Department of Housing and Urban Development (HUD) FY2011 Choice Neighborhoods Planning Grant for the purpose of creating a Transformation Plan for the Wheatley Courts and the neighborhood existing within the boundaries of IH-35 to the north, the railway to the east, Martin Luther King to the south and New Braunfels to the west. SAHA was subsequently awarded a \$29,750,000 2012 Choice Neighborhoods Implementation Grant in December 2012. The Choice Neighborhood grants are designed to catalyze critical improvements in neighborhood assets, including vacant property, housing, services and schools. It is focused on three core goals:

People: Support positive outcomes for families who live in the target development and the surrounding neighborhood, particularly outcomes related to residents' health, safety, employment, mobility and education.

Housing: Transform distressed public and assisted housing into energy-efficient, mixed-income housing that is physically and financially viable over the long-term.

Neighborhood: Transform neighborhood of poverty into viable, mixed-income neighborhood with access to well-functioning services, high quality schools and education programs, public assets, public transportation, and improved access to jobs.

McCormack Baron Salazar, serving as lead under the Housing component, will redevelop Wheatley Courts in four phases, to include three family phases, two on-site, and one off-site, and a senior development located on site in the heart of the new development. The redevelopment proposes a total of 591 new mixed-income multi-family and senior units that meet BSAG Level II and provide for an assortment of amenities, to include energy saving appliances, a swimming pool, a 2.5-acre park and a community center on site. The plan is also committed to one-for-one replacement of public housing units. Currently the plan calls for 202 Public Housing replacement units and 44 Section 8 Project Based Units, 137 market units, and 208 affordable units built using Low Income Housing Tax Credits. The site plan highlights two- and three-story townhouses and walk-up garden apartments. The buildings are positioned so that front doors and porches face the street, which provides for more 'eyes' on the street and encourages community interaction.

Wheatley Phase I – The Park at Sutton Oaks aligns with SAHA’s priorities to preserve its affordable housing stock and provide continued affordable housing for the citizens of San Antonio. It will feature 208 multi-family units, including 49 public housing units, 113 affordable units, and 46 market rate units. The new development will be constructed as a Build San Antonio Green BSAG Level II, near Fort Sam Houston in City Council District 2. The development will include one-, two-, three-, and four-bedroom floor plans. Construction is tentatively scheduled to be completed by December 2013. The estimated total development cost is \$29.5 million.

Wheatley Phase II – Proposes 184 new units of multi-family mixed-income housing both on and off-site.

Wheatley Phase III – This senior development will consist of 80 units, including 4 tax credit units, 28 project-based vouchers, and 48 public housing units.

Wheatley Phase IV – The final phase of the Wheatley redevelopment plan calls for a multi-family mixed income development consisting of 158 units along with a two-acre park adjacent to the development. The units will include 60 market units, 38 tax credit units, 10 project-based vouchers, and 50 public housing units.

SAHA, as the lead agency, in partnership with the City of San Antonio (COSA), will oversee the multi-faceted work to be completed under the Neighborhood component of the plan. The plan calls for a “focused neighborhood”, which will provide the opportunity to leverage and concentrate resources in order to have an immediate visible impact. The Transformation Plan includes neighborhood strategies that: promote infill-housing and repurposing of sub-standard vacant lots; improve the real and perceived sense of security by deterring gang activity; implement “hot spot” policing along routes to schools; decrease the number of stray animals and educate residents about available spay and neutering services; and improve streetscape and lighting. An additional tool of the “focused neighborhood” approach is COSA’s owner-occupied rehabilitation program. SAHA, in partnership with COSA and other non-profit affordable housing groups, will make a concerted effort to recruit qualifying homeowners in the focus area. In addition to these efforts, SAHA will set aside Choice Neighborhoods “Critical Community Improvement” dollars to assist interested homeowners who may not qualify through the current owner-occupied rehab program but are in dire need of these services.

The Neighborhood plan also includes strategies to promote economic activity through two large and four small community events that encourage art, entertainment and community, and a venue for small business vendors to showcase their goods

and services. It also calls for working collaboratively with San Antonio for Growth on the Eastside (SAGE), to recruit and retain businesses to the area, and to work in collaboration with the City of San Antonio and area Chambers of Commerce to create incentives for businesses to locate to the area.

Urban Strategies Inc., which will serve as the lead agency for implementation of all efforts under the People component, will launch comprehensive case management services, coordinate case management policies and procedures, and initiate partnerships with service providers. This includes increasing job training, education, employment and contracting opportunities. SAHA's intent is to foster equitable employment and business opportunities for low- and very low-income individuals, especially SAHA residents and programs participants, and to provide opportunities through MTW initiatives for upward economic mobility and self-sufficiency. As a result, SAHA will encourage and solicit the full participation of Section 3 residents for employment with SAHA and its contractors. SAHA will also require contractors to meet new hiring goals and provide training opportunities in accordance with the Small, Women, Minority Business Enterprises (SWMBE) policy, adopted this fiscal year, and Section 3, adopted in 2011.

On September 21, 2013, SAHA held its first-ever auction of 70 vacant lots, 12 vacant homes, and two large parcels yielding \$1.17 million in sales. In keeping with the Agency's preservation and expansion policies, proceeds from the auction will be used to reinvest in areas, such as the Eastside Choice Neighborhood.

Large Parcel Development- The agency anticipates the development of sustainable affordable housing on three large vacant parcels owned by SAHA, or one of its affiliated entities, that will expand SAHA's housing assets to meet the growing demand of individuals seeking housing assistance. Proposals under consideration, both with and without subsidy, will require that at least 20% of the units be reserved for families at 30% of AMI and that the development meet BSAG Level II energy efficiency standards.

Energy & Water Conservation and Operational Efficiencies

SAHA is committed to reducing its carbon footprint and conserving water. As outlined in SAHA's Preservation and Expansion Policy, the agency is committed to developing its own construction and materials standards, meeting Build San Antonio Green (BSAG) Level II on all development and redevelopment projects, and incorporating sustainable concepts and practices.

SAHA has taken great strides to increase efficiency in our current portfolio in the last two years by partnering with CPS Energy, Alamo Area Council of Governments, Honeywell, BSAG, the City of San Antonio, and San Antonio Water System.

SAHA's partnership with CPS Energy is noteworthy as the two agencies will be working together to achieve greater operational efficiencies. SAHA will be part of a pilot program to receive electronic images of bills, rather than paper bills. The agency plans to: expand the use of the CPS Energy Property Manager Portal, for more timely identification of move-ins and move-outs by residents; streamline billing with the use of collective billing for over 10,000 accounts; and issue payments to CPS Energy through the banking format with the accompanying addenda file. All of these future plans will allow for greater operational efficiencies.

Energy and water conservation work that has been completed or initiated this fiscal year includes:

- One elderly and disabled public housing community is being revitalized to BSAG Level II certification (Lofts at Marie McGuire).
- Peak Saver thermostats installed at all family communities in the non-profit portfolio.
- Installing Peak Saver thermostats at qualified family public housing sites.
- BSAG Level II multi-family at The Park at Sutton Oaks and San Juan phase III.
- Initiating a zero-waste recycle pilot at six communities (Jewett Circle, Madonna, San Pedro Arms, Mission Park, Villa Tranchese, and Riverside).
- Starting energy conservation pilot program at eight properties (Alazan, Olive Park, Cassiano, Village East, Lincoln, Mission Park, Riverside, and San Pedro Arms).
- Removing lawns and installing xeric gardens at three elderly and disabled public housing properties (San Pedro Arms, Madonna, and Matt Garcia).
- Engaging in HUD's new Affordable Green Initiative by actively working towards a Green Organizational Accreditation.

Comprehensive Resident Training and Employment Partnership

This initiative expands on the success of FY2011-1a - Promote Education through Partnerships, SAHA’s partnership with Alamo Colleges that facilitated the attainment of a high school diploma, college credits toward a certificate program or an associate’s degree or credits toward two years of college in preparation for education continuation at a four-year institution.

The new initiative expands two aspects of the program: (1) the number of SAHA’s partners who offer this kind of service, and (2) the number of SAHA residents and participants who graduate from the program with a high-wage, long-term job.

This self-sufficiency initiative is focused on creating new employment and employment-training opportunities for SAHA residents and participants based on employer-defined needs. The additional and expanded partnerships are anticipated to offer more resources for SAHA’s work-oriented client population.

Metric	Baseline	Benchmark	FY2013 Results
Signed partnership MOU	1	4 new or renewed MOUs per year	3 new/renewed executed and 3 being drafted
GED / high school diplomas received by participant	17	June 30, 2013: 37 June 30, 2014: 87	58 adult residents received GED/HSD (Jobs-Plus=9; FSS=49)
Job Training Completion	115	June 30, 2013: 235 June 30, 2014: 385	333 have completed training (Jobs-Plus= 157; FSS = 176)
Individuals Employed	20	June 30, 2013: 40 June 30, 2014: 80	(Jobs-Plus= 139 started employment)
Percentage of high-wage jobs	0%	June 30, 2013: 10% June 30, 2014: 20%	Developing a definition for “high-wage” (Jobs-Plus: 32 advanced in employment)
Average length of term of employment	0 months	June 30, 2013: 6 months June 30, 2014: 12 months	(Jobs-Plus: 75% retained employment for at least 270 days)

Data for this initiative will be gathered using the Tracking at a Glance (TAAG) database and FSS monthly reporting spreadsheets, and any other mechanism detailed in individual MOUs.

Student Achievement Partnerships

This self-sufficiency initiative establishes partnerships that focus on the educational needs of children and youth in SAHA-assisted households. The partnerships facilitate access to educational resources dedicated to supporting students' academic success at various stages, including pre-K, school transitions, and pre-graduation. SAHA anticipates that health resources and programs will also play an important supportive role.

Over the long-term, SAHA expects this investment in the education of children to reduce the rate at which these children, as adults, require housing assistance. SAHA will also be looking for short-term impacts on family well-being and economics due to increased attention on children's needs and success.

During the initiative's first phase, SAHA will contract with partners associated with Promise/Choice Neighborhoods initiatives in the Wheatley Courts area to achieve benchmarks such as: kindergarten readiness, academic performance, successful transitions from elementary to middle school to high school, career-readiness of high-school graduates, and children's health and nutrition. During the subsequent expansion phase, SAHA will apply successful models to other SAHA properties.

Success will be measured using metrics that mirror those to which Promise and Choice have already made commitments. Data collection will be closely tied to Promise / Choice Neighborhood agreements, since data sharing and measurement is one of the key elements of both Promise and Choice Neighborhood initiatives.

SAHA received final approval on August 23, 2013 of the Choice Transformation Plan submitted to HUD on June 27, 2013. SAHA is in the process of developing the next phase of implementation.

Education Investment Foundation (EIF)

The Education Investment Foundation (EIF) is committed to the development of educational opportunities to help break the cycle of poverty among students who reside in public housing or whose families participate in the voucher programs. The goal of the EIF is to help the under-served youth of our community by providing initiatives designed to promote education and self-sufficiency, and help them emerge as viable and productive members of our society. Over the past year, the EIF has had many accomplishments including:

- Awarded 25 college scholarships totaling \$35,000
- Honored 250 students with REACH awards for perfect attendance and honor roll--totaling \$11,000
- Hosted the 15th Annual Golden Gala with over 800 residents in attendance

- Provided WIFI access to 30 communities
- Established the first learning center at Westway
- Developed five libraries at Westway, Cross Creek, Cheryl West, Dr. Charles Andrews, and Mission Park
- Participated with Frost Bank to host several events including a Financial Education Day and a Dream Week event where over 40 students and their parents attended
- Hosted a golf tournament raising \$10,000

Health and Wellness

SAHA's Health and Wellness Committee is actively engaged in encouraging healthy lifestyles by promoting awareness that provides direction in making enlightened choices, sustaining a healthy perspective, and providing essential tools that will enhance all efforts made towards living in good health and wellness.

Committee Goals and Objectives:

- Create a fun, safe, learning environment to inspire the citizens of San Antonio
- Reduce pedestrian and bicycle-related accidents in San Antonio
- Reduce the San Antonio obesity epidemic
- Increase safety and awareness in cyclists and auto drivers
- Transform San Antonio into a bicycle friendly commuter city
- Educate SAHA residents on the importance of nutrition and physical activity
- Increase family participation
- Create a positive social movement in San Antonio

Bicycle and pedestrian awareness for sharing the road are still in the infancy stage in San Antonio. Many auto drivers do not recognize bicycles as vehicles and many cyclists in San Antonio do not follow traffic laws and ordinances as required. SAHA is working closely with organizations such as the San Antonio Police Department, the Metropolitan Planning Organization (MPO), The Office of Sustainability, and other organizations to help make San Antonio roads safer for our residents and the City of San Antonio. According to MPO, San Antonio averages 971 bicycle and pedestrian accidents a year. SAHA successfully organized three bike rides this year, with 45 individuals participating in the first bike ride, 95 in the second ride, and 145 in the third ride.

VIII. Administrative

A. Description of progress on the correction or elimination of observed deficiencies cited, if applicable

Not Applicable.

B. Results of latest Agency-directed evaluations of the demonstration, as applicable

Not Applicable.

C. Performance and Evaluation Report for Capital Fund activities not included in the MTW Block Grant, as an attachment to the Report (See Appendix A)

D. Certification that the Agency has met the three statutory requirements (See Appendix B)