

Moving to Work Annual Report

Fiscal Year 2015: July 1, 2014 to June 30, 2015



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

MESSAGE FROM CEO

Our Agency's vision is to create dynamic communities where children and families, seniors, individuals with disabilities and veterans thrive. To do this, we are constantly innovating to stretch the limited federal funds, secure local partners, and develop effective housing and resident development programs.

As a Moving to Work Agency, SAHA is committed to reducing cost and achieving greater cost effectiveness in Federal expenditures; providing incentives that promote self-sufficiency; and increasing housing choices for low-income families in San Antonio. Over the last five years, SAHA has utilized its Moving to Work (MTW) designation to expand affordable housing by securing \$187 million to develop nearly 1,500 new housing units. We proudly celebrated the completion of 460 units in 2014-2015 with the grand opening of two new mixed-income housing communities: the Park at Sutton Oaks and the Gardens at San Juan Square.

In spite of this tremendous effort, the need for housing remains a priority with almost 40,000 families on SAHA's housing wait lists. Therefore, SAHA continues to focus on executing its Five-Year Affordable Housing Preservation and Expansion Plan, which will create 935 new units, and preserve 470 Public Housing units for a total investment of \$143 million by 2020.

We are proud of the place-based revitalization efforts taking place in San Antonio's EastPoint Choice Neighborhood, with significant federal investments from HUD, the Department of Education and the Department of Justice. At the end of year two, significant progress has been made in transforming the Wheatley Courts neighborhood into a safe, pedestrian-oriented, mixed-income community -- with homeownership opportunities, improved access to jobs and healthcare, and high-performing schools.

We know that children in a stable, quality housing environment achieve more in school. Of the 65,000 individuals served each year by SAHA, 33,000 are children under the age of 18. To promote educational and employment opportunities, SAHA expanded free Wi-Fi access at 50 of our public housing properties; established children's libraries in 12 of our family communities; and awarded more than \$200,000 in college scholarship funds. Additionally, our self-sufficiency programs have over 1,900 residents actively engaged, with 40% of participants employed.

With a hard-working and visionary Board of Commissioners, a skilled and dedicated staff, committed partners, and engaged children, families, and senior citizens, our vision to **Create Dynamic Communities Where People Thrive**, will be realized.

We appreciate the opportunity to share and showcase some of SAHA's FY2015 achievements in this year's MTW Annual Report.



 David Nisivoccia
Interim President and CEO

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

Moving to Work Goals

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

SAHA Board of Commissioners

Fiscal Year 2015: July 1, 2014 to June 30, 2015

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David Clark, Director of Public Housing

Domingo Ibarra, Director of Safety & Security

SAHA Moving to Work Staff

Sara Eaves, GIS and MTW Program Analyst

Contributing SAHA Staff

Gary Baxter, Roman Castorena, Madlyn Lane, Silvia Lozano,

Aiyana Longoria, Brandee Perez, Katherine Ramirez, Stefanie

Ramirez, Susan Ramos-Sossoman, Roberto Ramirez, Tom Roth,

John Stewart, and Lilia Swayne



I. INTRODUCTION

TABLE OF CONTENTS

Message from CEO.....	3
I. Introduction	5
II. General Housing Authority Operating Information	19
III. Proposed MTW Activities	35
IV. Approved MTW Activities	36
V. Sources and Uses of Funds	111
VI. Administrative	118

OVERVIEW

The San Antonio Housing Authority (SAHA) provides housing to over 65,000 children, adults, and seniors through three housing programs – Public Housing, Housing Choice Vouchers, and Mixed-Income housing programs. SAHA employs approximately 525 people and has an annual operating budget of \$186 million. Existing real estate assets are valued at over \$500 million.

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

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

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

FY2015 HIGHLIGHTS

**BIBLIOTECH PARTNERSHIP:
NATION'S FIRST ALL-DIGITAL
PUBLIC LIBRARY AT A PUBLIC
HOUSING COMMUNITY**

**252 NEW HOUSING UNITS AT THE
GARDENS AT SAN JUAN SQUARE**

**DEMOLITION OF WHEATLEY
COURTS ON EASTSIDE**

**GRAND RE-OPENING OF THE LOFTS
AT MARIE MCGUIRE**

**OVER 1,900 RESIDENTS WERE
ACTIVELY ENGAGED IN A SELF-
SUFFICIENCY PROGRAM**

**ALMOST 1,500 HOUSEHOLDS
BEGAN THEIR PATH TO SELF-
SUFFICIENCY BY ATTENDING A
MANDATORY EARLY ENGAGEMENT
PROGRAM**

**32 HOUSEHOLDS TRANSITIONED TO
SELF-SUFFICIENCY**

MTW SUCCESS: STORIES FROM THE PEOPLE WE SERVE

SANDRA'S STORY: MTW FUNDING FOR EMPLOYMENT AND TRAINING

As a result of SAHA's funding flexibilities through the MTW demonstration program, residents like Sandra are provided opportunities to have meaningful employment and training experiences to help them achieve their own dreams of economic self-sufficiency.

SAHA's self-sufficiency programs currently serve over 1,900 residents that are actively pursuing education, training, and jobs, to improve their quality of life and achieve economic stability. In partnership with local agencies, SAHA is leveraging MTW funding to create opportunities through supportive services that assist participants to raise education levels, increase job skills, and promote advancement.

Sandra Caballero has always wanted to pursue a medical career, but the 33-year-old mother of seven children, ages 4-14, has faced unexpected challenges, including caring for a child with a disability.

She recently realized her dream by completing a pharmacy technician program at Alamo Colleges, in partnership with the Health Professions Opportunity Grant, which provides education and training for high-demand occupations in the healthcare field. She's now working in a pharmacy and she plans to attend nursing school.

"Completing the program was difficult at times," Sandra says. "But I want more for my kids and this program was an amazing opportunity for me to continue my education and provide for my family. I'm very thankful."

"COMPLETING THE PROGRAM WAS DIFFICULT AT TIMES," SANDRA SAYS. "BUT I WANT MORE FOR MY KIDS AND THIS PROGRAM WAS AN AMAZING OPPORTUNITY FOR ME TO CONTINUE MY EDUCATION AND PROVIDE FOR MY FAMILY. I'M VERY THANKFUL."

--SANDRA



Sandra, a participant in the Health Professions Opportunity Grant.

GARDENS AT SAN JUAN SQUARE: MTW FUNDING FOR IMPROVING HOUSING CONDITIONS AND INCREASING HOUSING CHOICES

As a result of SAHA’s expansion activities through the MTW demonstration, residents like Janie Romo are afforded more housing choices and given the unique opportunity and support to work where they live.

San Antonio Express-News

Featured Story:

Eight years ago, the 1900 block of Zarzamora Street was in disarray as the area prepared for the demolition of the old San Juan Homes, crime-plagued low-income housing.

Today, five businesses have moved into the new Gardens at San Juan complex, capping an economic turnaround for the area. The \$65 million, residential-commercial development is a partnership between the San Antonio Housing Authority, NRP Group and Westside Development Corp., and is financed through a mix of city bonds, state tax credits and federal grants. The complex includes 539 residential units and will boast Biblio-Tech’s second branch in the coming year.

With most public attention focused on the development’s new residential space, West-side Development Corp. President Leonard Rodriguez said the project’s commercial aspect — a maximum of 12 live-work spaces aiming to anchor entrepreneurs in the neighborhoods where they conduct business — has been the development’s unsung hero.

“We see this as being a really positive thing for the area,” Rodriguez said. “Micro-business development on a major corridor ... creates a new regional destination not just for West Side shoppers, but (for visitors) from all over the city.”

“THIS CAREER IS ACTUALLY SOMETHING I NEVER KNEW EXISTED, BUT WITH A LOT OF HARD WORK HAS BECOME A REALITY,” SAID ROMO. “(CREATING) MY PRODUCT USING LOCAL INGREDIENTS, ESPECIALLY FROM THE FARMERS MARKET, MAKES (THIS) UNIQUE.”

--JANIE



Kin Man Hui / San Antonio Express-News Ms. Chocolatier owner Janie Romo says living in the development gives her a direct connection to the neighborhood.



Marvin Pfeiffer / San Antonio Express-News Victor Hernandez (left) and Blair Wilson installed a hand-painted sign in December for the grand opening of Nina Donley's art gallery, Zac Cimi Arte, at the Gardens at San Juan complex.

The five businesses are an art gallery, a chocolatier, a nail salon, real estate agent and a boutique. Interested entrepreneurs have to present a feasible business plan and meet income restrictions to get a space at San Juan.

Local artist Nina Donley opened her gallery, Zac Cimi Arte, at San Juan in December. While Donley loosely described her style as neo-abstractism, the main portion of her gallery will be a rotating collection of local artists with varying styles and mediums.

Donley said she wants her gallery to act as something more than just a business in a neighborhood still trying to shake a “sketchy” stigma.

“I want this to become a community hub,” said Donley, who’s put up fliers for organizations that help victims of abuse, LGBT groups and animal rescue operations and asks all visitors to make a canned food donation that go to area charities. “People who heard I was moving (the gallery) here told me, ‘No, Nina, don’t do it!’ But things have been completely fine.”

Arturo Barrera, a local musician who helps out at Donley’s gallery, said the area has grown on him, too.

“I used to hate passing by this neighborhood as a kid, but now it’s been revamped,” he said. “I feel secure. People (who come here) feel awesome.”

Janie Romo is a chef who runs the confectionery — Ms. Chocolatier — at the site. Romo’s business, which she described as a “dream job,” is about five years old and has appeared at the Pearl and similar venues.

“This career is actually something I never knew existed, but with a lot of hard work has become a reality,” said Romo. “(Creating) my product using local ingredients, especially from the farmers market, makes (this) unique.”

Romo, who makes both candy and chocolates on-site, said that living in the development gives her a direct connection to the neighborhood where she will sell her sweets. She’s also planning on offering classes for interested area residents at some point in the future.

SAHA officials said that, as of last week, three applications for more businesses were pending with four spots remaining open. Rodriguez said he’s looking forward to seeing San Juan fill out these remaining spaces soon.

“That whole development is undergoing a facelift,” Rodriguez added, “But the commercial aspect will really add to the ongoing (progress) there.” jgerlach@express-news.net

Update to Story: All 12 live/work units were leased as of June 30, 2015. Six businesses are open and the remaining six are scheduled to be opened by September 2015. All tenants are participating in the Live-Work Accelerator Program which includes seven partners: LiftFund, Café Commerce, People Fund, West Chamber of Commerce, YWCA, SCORE, and GreenPath. The program assists micro- and small-businesses with limited enterprise and low- to moderate-income (LMI) status. Tenants receive start-up business

management assistance, technical assistance, access to capital, free participation in partnership programs, Chamber of Commerce membership, and one-on-one Mentor-Protégé Pairings.

As a result of SAHA's participation in the MTW demonstration, young adults like those featured below are making the most out of education opportunities that provide a next step to achieving self-sufficiency. While SAHA's Education Investment Foundation is not supported with MTW funding, the commitment to the Moving-to-Work philosophy has created the space for the agency to approach partners to support public housing and Section 8 youth in their pursuit of a college degree. This support is vital to breaking the cycle of poverty.

The Education Investment Foundation serves more than 7,000 clients each year and achieves its mission through four key programs: College Scholarships, R.E.A.C.H. Awards, the William 'Bill' Sinkin Education Summit and Education Centers. Since 1998, the SAHA Education Investment Foundation has raised nearly \$600,000 in college scholarships awarded to 540 students. Scholarships are awarded to eligible high school seniors and returning college students.

This fiscal year, SAHA would like to congratulate 6 former recipients of SAHA scholarships for earning their college degrees. Highlighted below are just a few their stories.

Kalia-graduated Dec. 2014 from Texas A&M College Station

I am the first person in my family from Panama to go to college and continue my education here in the U.S. I majored in Biomedical Science and obtained a certification in Cultural Competency and Spanish Communication.

I am currently working for Wells Fargo, then will continue my education to obtain a master (degree) in public health to focus on environmental health, providing resources, and leading the community. I specifically want to work for the Environmental Protection Agency, Homeland Security, or the Center for Disease Control.

Thanks to the support and sponsors from SAHA, I received the scholarship from 2010-2014.

Alexander-graduated May 2015 from University of the Incarnate Word

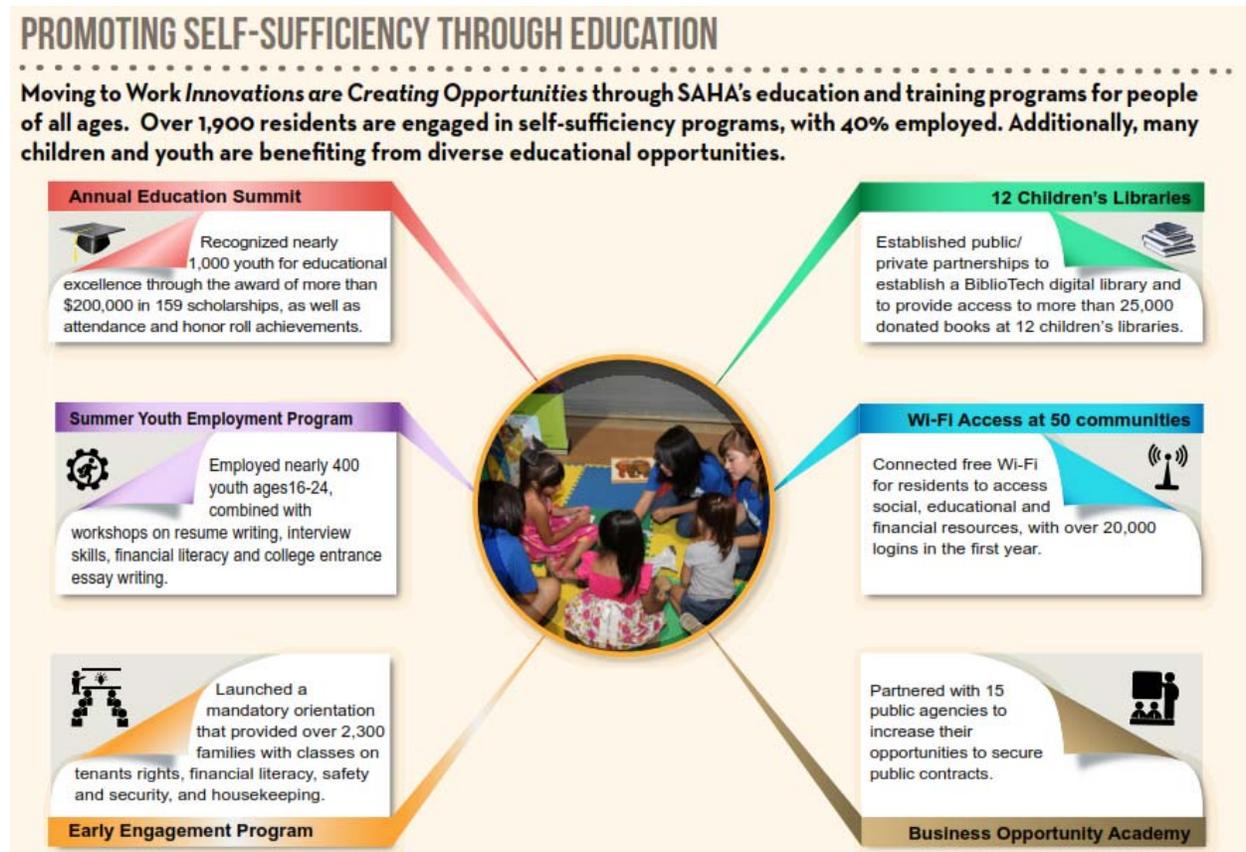
I'm graduating on May 9, 2015, with a BS in Vision Science from the University of the Incarnate Word. Starting this August, I will start optometry school at the Rosenberg School of Optometry at the University of the Incarnate Word. I received the EIF Scholarship for four years from 2011-2014.

I would like to say thank you to EIF. This organization has been a great help throughout my undergraduate academic career. I truly appreciate the help you have provided to me.

Allyson-graduated May 2015 from Rice University

I majored in Philosophy. I completed a senior thesis, so I will be graduating with departmental honors, and possibly university distinction (waiting for confirmation). I graduate May 16. I plan to take a gap year to apply to graduate/law school with the aim of being accepted to a dual-degree program, where I can get my jd/phd in philosophy in about 6-7 years. I would like to become a philosophy of law professor. I graduated High School in 2011, so that's when I received the SAHA Scholarship. I was a Guest Speaker at the EIF Banquet that year. I reapplied each year. The money has been incredibly useful for traveling home and purchasing text books/supplies.

Other Education Investments



SHORT-TERM ACCOMPLISHMENTS

- **Completed the third and final phase of the San Juan redevelopment** in December 2014. The 252-unit Gardens of San Juan includes 4,200 square feet of commercial space and 12 live/work units to promote small business opportunities. The development was estimated to have a local economic impact of about \$95 million.
- Created a partnership with Bexar County for the **nation's first all-digital public library, BiblioTech, in a housing authority community**. The BiblioTech library, located at The Gardens of San Juan, will lend e-readers and digital content rather than physical media. Additionally, the library will provide critical online access to a segment of lower-income residents, including children.
- Celebrated the **grand re-opening of The Lofts at Marie McGuire**, a Public Housing community for elderly and disabled residents, which underwent a \$6 million comprehensive renovation. This community was also recognized by the U.S. Department of Energy for saving energy and reducing greenhouse gas emissions.
- **Completed the demolition of Wheatley Courts on San Antonio's Eastside**. The demolition is in advance of the new construction of 417 new mixed-income apartments. The unprecedented public-private collaboration that is taking place in this community will create a neighborhood that links housing, economic development and infrastructure improvements with much-needed services, such as quality schools, healthcare, transportation and access to jobs.
- **Received 20 Awards of Merit** from the National Association of Housing and Redevelopment Officials (NAHRO) for various innovative programs and initiatives.
- **Presented approximately 280 R.E.A.C.H. (Rewarding Educational Achievement, Cultivating Hope) Awards to SAHA students** for achieving Perfect Attendance and/or A-B Honor Roll. In addition, **40 SAHA youth received college scholarships**.

PROGRESS TOWARDS LONG-TERM GOALS AND OBJECTIVES

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

Vision: Create dynamic communities where people thrive.

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

Strategic Goals

- 1) Empower and equip families to improve their quality of life and achieve economic stability.
- 2) Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.
- 3) Preserve and improve existing affordable housing resources and opportunities.

- 4) Strategically expand the supply of affordable housing.
- 5) Transform core operations to be a high performing and financially strong organization.
- 6) Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.

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

Key Strategic Goal Metrics

*Metrics in **boldface** are MTW Standard Metrics.*

Strategic Goal	Metric	Definition
1: Empower and equip families to improve their quality of life and achieve economic stability.	Education Attainment	% of 19 and older adults with an education level of 12 or more; Level 12 indicating GED/HS Diploma
	Employment rate of residents / participants (FT equivalent)	% of work-able adults that are employed at or above minimum FTE work level
	Employment rate of residents / participants (PTE and FTE)	% of work-able adults that are employed at or above minimum PTE work level
	Earned income	Median earned income of SAHA-assisted adults working at a full-time equivalent
	SS #8: Self Sufficient	Number of households transitioned to self-sufficiency
2: Invest in our greatest resource – our employees – and establish a track record for integrity, accountability,	Performance Evaluations Completed on time, %	Percentage of complete and correct evaluations submitted to HR within 30 days of anniversary date (hire date or promotion date)
	External client satisfaction, %	TBD
	Employee turnover rate	Number of employees that have left divided by the total number of employees (for the period)

Strategic Goal	Metric	Definition
collaboration and strong customer service.	Training commitment	Ratio of dollar amount set aside for training in each department's budget (to include tuition reimbursement, professional certification activities) to dollar amount spent for training
	Value of benefits	\$ in medical, life insurance, disability, and dental/vision benefits, per employee
	Wellness programs	\$ invested in SAHA wellness programs
3: Preserve and improve existing affordable housing resources and opportunities.	MTW HC #2: Units of Housing Preserved	Number of housing units preserved for households at or below 80% AMI that would otherwise not be available
	Units of Housing Preserved (non-MTW)	Units of affordable housing preserved
	Funds expended	Amount of dollars paid in accordance with contractual obligations (versus funds obligated)
	Funds expended, per unit	Average amount of preservation dollars expended, per unit
	Work orders closed within 2 days, %	Percentage of work orders closed out within 2 days
	Emergency Work Orders completed same day, %	Percentage of emergency work orders completed the same day of being ordered
4: Strategically expand the supply of affordable housing.	Units acquired or built (completed)	Total sum of all units acquired or built
	Funds expended on units acquired or built (completed)	Federal dollars invested
	Funding leveraged	Dollar value of non-federal funds invested in expansion
	Post-partnership units	Number of units that come back to SAHA ownership after partnership compliance period expires
	Voucher value	Dollar value of new vouchers secured
	Additional vouchers secured	Number of new, competitive vouchers secured
5: Transform core operations to be a high performing and financially strong organization.	Occupancy (%)	(Total Standing Units minus Vacant Units) divided by Total Standing Units. This measure accounts for units such as agency, litigation, fire, etc. that are not occupied by a tenant, but do not count against the occupancy rate.
	Utilization – MTW Baseline	Voucher utilization based on MTW baseline

Strategic Goal	Metric	Definition
	Average HAP	Average HAP per unit
	HCV Scorecard	TBD
	Non-Profit DSCR	Debt service coverage ratio
	MTW Total # of Households Assisted	Number of MTW households assisted through MTW using the MTW baseline methodology set forth in PIH-2013-02. Includes all PH households, all MTW Voucher Households, and "Other" households defined as non-PH and Non-S8 households occupying a unit reserved for <80% AMI at any MTW funded development
	PH NOI	Net Operating Income per year per unit
	Deferred Maintenance, PH	\$ millions (value of Categories 1, 2, and 3)
	Deferred Maintenance, NP	\$ millions (value of Categories 1, 2, and 3)
	PHAS Score	Overall PHAS score for SAHA
	Non Profits Score	Aggregate [scorecard] score for Non Profits
	Partnerships Score	Aggregate [scorecard] score for Partnerships
6: Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.	Agency Awards/Recognition	Number of national, state, and local awards for agency programs
	State and National Representation	Number of state or national trade group associations (partner industries), committees or boards on which at least one SAHA representative is serving, to include presentations at conferences
	Local Leadership and Representation	Staff participating in external leadership programs (LSA, Masters, etc.) plus non-profit board service
	Positive media coverage (%)	Number of positive/neutral hits divided by total (all) hits, by media outlet
	Policy wins (%)	Number of policies finalized in SAHA's favor divided by total number of policies engaged

Long-term Strategic Goals and Short-term (Annual) Objectives

Strategic Goals (Long-term 2020)	Objectives (Short-term FY2016)
1: Empower and equip families to improve their quality of life and achieve economic stability.	Increase the number of residents achieving self-sufficiency
	Increase the earned income of adults
	Increase the employment rate of residents
	Improve education outcomes
	Expand the number of residents that complete homeownership readiness program
	Increase residents' access to resources

Strategic Goals (Long-term 2020)	Objectives (Short-term FY2016)
	Improve Wheatley Court residents' health outcomes
2: Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.	Reduce and stabilize employee turnover rate
	Increase external client satisfaction rate
	Increase performance evaluations completed on time
	Increase training commitments
	Develop metrics and implement wellness initiatives that impact long-term medical costs (ROI)
3: Preserve and improve existing affordable housing resources and opportunities.	Improve work order outcomes
	Meet capital fund expenditure targets (public housing)
	Adhere to Beacon 5-year plan
	Complete Energy Performance Contract Project
4: Strategically expand the supply of affordable housing.	Ensure units are constructed or acquired according to schedules
	Complete Choice Neighborhood public infrastructure improvements to benefit neighborhood
	Secure additional funds for new development and acquisition
	Ensure favorable terms for MTW Extension
	Change TDHCA QAP to support a more balanced range of projects
	Draft final policy to increase number of residents living in Neighborhoods of Opportunity
5: Transform core operations to be a high performing and financially strong organization.	Increase occupancy
	Increase MTW total # households assisted
	Improve NP Debt Service Coverage Ratio
	Improve PH net operating income per unit
	Increase PHAS score
	Increase HCV Scorecard score
	Increase performance score for partnership portfolio
	Create performance metric for Beacon Portfolio
	Maintain adequate MTW working capital
	Develop and propose visioning process for agency, including long-term MTW goals (looking forward 3-5 years)
Develop SOPs for utilization of grant funds	

Strategic Goals (Long-term 2020)	Objectives (Short-term FY2016)
	Organize, review, and understand all partnership agreements, and establish timeline for implementing all requirements
6: Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.	Increase # of agency awards
	Increase local, state and national representation / Expand SAHA Leadership Pool
	Increase positive media coverage
	Increase SAHA policy engagement and wins

In addition to these long-term goals, the Agency has committed to a 5-year rent study. The Agency was selected to participate in a study commissioned by the U.S. Department of Housing and Urban Development (HUD) to evaluate a Housing Choice Voucher (HCV) alternative rent reform policy. MDRC, a nonprofit and nonpartisan education and social policy research organization, is conducting the study on behalf of HUD. The study sets forth alternative rent calculation and reexamination strategies that will be implemented at several public housing authorities across the country in order to fully test the policies nationally. (More information on the progress of this rent study can be found in Section IV.A. FY2015-1 MDRC/HUD Rent Reform Study.)

The goals of this alternative rent policy are to:

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

II. GENERAL HOUSING AUTHORITY OPERATING INFORMATION

A. HOUSING STOCK INFORMATION

Pursuant to PIH Notice PIH-2013-02 (HA), *Baseline Methodology for Moving to Work Public Housing Agencies*, the Agency's adjusted MTW baseline denominator for FY2015 is 17,803 households (PH: 5,684 and HCV: 12,119).

SAHA has experienced some changes in housing stock. At the end of FY2015, SAHA had 6,066 units in public housing (PH) and 13,019 authorized MTW vouchers. SAHA added a total 158 units (27 HOME/LIHTC and 131 LIHTC (only) units) at a new mixed-income community, the Gardens at San Juan Square, to the existing 113 local, non-traditional MTW units—totaling 271 units. (See Section IV.A.FY2011-1e for more information.)

PUBLIC HOUSING (PH) STOCK CHANGES:

SAHA added 63 new PH units as part of the new mixed-income project, Gardens at San Juan Square.

One (1) single-family Springview Home was sold this fiscal year as part of the Agency's home ownership program (HP0114 622 H Street).

Marie McGuire, with 63 PH units, was held off-line for substantial rehabilitation and was successfully re-occupied in FY2015. While this does not impact the agency's baseline denominator, it did have an impact on leasing.

VOUCHER AUTHORIZATION CHANGES:

SAHA had no changes to the total number of vouchers authorized.

OTHER HOUSING STOCK CHANGES (NON-PROFIT/PARTNERSHIPS):

Starting in FY2014, SAHA amended its MTW Agreement to allow Replacement Housing Factor Funds (RHF) to be added to the MTW Block Grant. As a result, in fiscal year 2015 SAHA was able to build a new tax-credit development, the Gardens at San Juan Square. This development includes 63 PH units, 27 COSA - HOME/LIHTC, 131 LIHTC (only) units, and 31 Section 8 Project-Based Voucher units for a total of 252 MTW units.

(TABLES FROM FORM 50900)

New Housing Choice Vouchers that were Project-Based During the Fiscal Year

Property Name	Anticipated Number of New Vouchers to be Project-Based *	Actual Number of New Vouchers that were Project-Based	Description of Project
Gardens at San Juan Square	31	31	The Gardens at San Juan Square is a mixed-income community in SAHA's partnership portfolio. The community is the third and final phase of the re-development of San Juan Homes. The Project includes 63 PH units, 27 COSA - HOME/LIHTC, 131 LIHTC (only) units, and 31 Section 8 Project-Based Voucher units for a total of 252 MTW units.
Up to 4 Properties	100	0	PBVs not committed.
Wheatley	10	0	PBVs not committed as the project is still in pre-development.
Victoria Commons Chavez Multifamily	39	0	PBVs not committed as the project is still in pre-development.

<p>Anticipated Total Number of New Vouchers to be Project-Based *</p>	<p>Actual Total Number of New Vouchers that were Project-Based</p>	<p>Anticipated Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year *</p>	<p>Anticipated Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year *</p>
<p>180</p>	<p>31</p>	<p>180</p>	<p>31</p>
		<p>Actual Total Number of Project-Based Vouchers Committed at the End of the Fiscal Year</p>	<p>Actual Total Number of Project-Based Vouchers Leased Up or Issued to a Potential Tenant at the End of the Fiscal Year</p>
		<p>31</p>	<p>31</p>

Other Changes to the Housing Stock that Occurred During the Fiscal Year

<p>Public Housing: SAHA added 63 new PH units part of the new mixed-income project, Gardens at San Juan Square.</p> <p>One (1) single-family Springview Home was sold this fiscal year as part of the Agency's home ownership program (HP0114 622 H Street).</p> <p>Marie McGuire, with 63 PH units, was held off-line for substantial rehabilitation and was successfully re-occupied in FY2015.</p>
<p align="center">Vouchers: SAHA had no changes to the total number of vouchers authorized.</p>
<p>Non-Profit/Tax-Credit Partnerships: Starting in FY2014, SAHA amended its MTW Agreement to allow Replacement Housing Factor Funds (RHF) to be added to the MTW Block Grant. As a result, SAHA was able to build a new tax-credit development, the Gardens at San Juan Square. This development includes 63 PH units, 27 COSA - HOME/LIHTC, 131 LIHTC (only) units, and 31 Section 8 Project-Based Voucher units for a total of 252 MTW units.</p>

General Description of Actual Capital Fund Expenditures during the Plan Year

Property	Description of Work	Activity in FY 2015
Charles Andrews	A/E - Int/Ext/Site - Substantial Renov.	\$ 78,085.00
HB Gonzalez	Foundation Movement Study (Ph. II-IV)	\$ 49,615.00
Jewett Circle	A/E - Foundation Movement Study	\$ 54,606.02
Lewis Chatham	A/E - HVAC Improvements	\$ 22,500.00
Marie McGuire	Dwelling Equipment	\$ 18,032.03
Marie McGuire	A/E - Elevator Repairs	\$ 5,220.00
Marie McGuire	A/E - West Wall Repairs	\$ 19,393.75
Marie McGuire	Elevator Tower Structure Repairs	\$ 68,345.30
Matt Garcia	Ext. Repairs Scope Determination	\$ 4,950.00
Matt Garcia	Ext. Structural Repairs	\$ 130,630.00
Pin Oak I	A/E - Ext. Wall/Roof Design	\$ 19,779.60
Pin Oak I	Ext.-Int. Structural Rep	\$ 320,814.53
Sahara Ramsey	A/E - Building Movement Sturdy	\$ 27,145.38
San Pedro Arms	A/E - Fire Escape Repair Engineering Services	\$ 6,590.36
Scattered Site	Burn Unit Renovation - Galesburg	\$ 12,500.00
South San	A/E - Drainage Correction	\$ 8,498.85
South San	Roof Repairs/Schematic Design	\$ 1,671.50
South San	Site Improvements - Drainage	\$ 317,874.07
South San	Roof Repairs	\$ 16,606.10
South San	A/E - Additional Services Drainage	\$ 14,525.00
South San	A/E - General Civil Engineering Svr	\$ 5,125.00
WC White	A/E - Basement Column Distress	\$ 19,849.00
Westway	A/E - Drainage Sewer Site Improvements	\$ 109,444.50
		\$ 1,331,800.99

Overview of Other Housing Owned and/or Managed by the PHA at Fiscal Year End

In FY2015, the only changes to other housing owned and/or managed by the PHA is the addition of 158 non-Section 8/9 units at the Gardens at San Juan Square, as mentioned above. There is one major change in how SAHA is categorizing units. SAHA owns and/or manages many units that are funded with tax-credits, HOME, CDBG, and other financing tools. As a result of this multi-layered financing and to minimize confusion and double-counting, multi-layered units are now all reported in the other category.

Housing Program *	Total Units	Overview of the Program
Market-Rate	1,902	Units are scattered throughout the Agency's non-profit portfolio (Beacon Communities) and partnership portfolio see below
Other	5,294	
Total Other Housing Owned and/or Managed	7,196	

* **Select Housing Program from:** Tax-Credit, State Funded, Locally Funded, Market-Rate, Non-MTW HUD Funded, Managing Developments for other non-MTW Public Housing Authorities, or Other.

If Other, please describe:

Includes all other affordable housing reserved for low income households with less than 80% of Area Median Income (Tax-Credits, Affordable Housing Disposition Program (AHDP), Bond, State HOME funds, State Housing Trust Funds, Project-Based Assistance (PBA), and Fannie Mae)

B. LEASING INFORMATION

Pursuant to PIH Notice PIH-2013-02 (HA), *Baseline Methodology for Moving to Work Public Housing Agencies*, the Agency's FY2015 MTW families served (annual average) is 17,499 out of 17,803 MTW adjusted baseline denominator. At fiscal year end, the agency improved leasing across all programs to achieve 101% of the MTW baseline denominator. The Agency continues to serve substantially the same number of households as it did upon entering the MTW demonstration.

	MTW – Serving Substantially the Same			Updated Total Households Served at Fiscal Year-End	
	MTW Baseline Denominator	MTW Baseline Numerator (Annual Average Leasing)	MTW Baseline Compliance Calculation	MTW Baseline Numerator for June 2015	MTW Baseline Compliance Calculation for June 2015
PH	5,684	5,598	98%	5,750	101%
Vouchers	12,119	11,790	97%	12,090	100%
Other (Local, Non-Traditional)	N/A	111	N/A	156	N/A
Total	17,803	17,499	98%	17,996	101%

PUBLIC HOUSING LEASING:

The Public Housing Program experienced specific leasing issues at the new Gardens at San Juan Square. Specifically, as a result of the multi-layered financing of the property the income restrictions for PH units were stricter. Traditionally, PH income restrictions allow new admissions of households with an income less than 80% AMI while the tax-credit requirement at this property required less than 30% AMI. As a result, 75% of PH applicants were deemed over-income. To add to this challenge, the tax-credit property calculates rent differently than the housing authority by counting expected income and child support that was not being received by the household instead of actual income. Another leasing issue at the property was slow processing time by the third-party management company which led to applicants having to re-submit paperwork to comply with the 45 day paperwork rule which states that all participant-provided paperwork can be no more than 45 days old. Different criminal history policies also played a role in slower leasing. Public Housing was able to mitigate these initial challenges by creating a new process whereby third-party property management staff and SAHA admissions staff met with clients on the same day in the same office. In addition, multiple follow-up calls were placed to clients after their initial appointment to ensure the client followed through with a second appointment. As of June 30, 2015, all public housing units at the property were leased.

HOUSING CHOICE VOUCHER LEASING:

During last fiscal year, SAHA was in a shortfall position and opted to apply for Set Aside funding. To qualify for the set aside funding PHAs were required to cease lease up activities immediately, through January 2014. In October 2013, SAHA received official notification from HUD that our Set Aside Funding application had been denied. SAHA developed a lease up plan and began selecting applicants from the wait list in December 2013 and each month through the end the fiscal year.

The lease-up activity continued this fiscal year. This fiscal year, SAHA selected approximately 17,500 applicants from the waiting list and issued a total of 2,400 vouchers. The response rate from selected applicants was approximately 25%, due largely to outdated applicant contact information (e.g., mailing addresses) in SAHA's records. Currently, SAHA is purging its HCV waiting list. Due to the number of applicants selected from the waiting list who had preferences that could not be verified at the time of the family's eligibility appointment, SAHA increased the number of additional applicants selected from the waiting list. In addition, the success rate of applicants who leased up after voucher issuance was approximately 16%. SAHA will continue to select applicants from the waiting list in order to meet the established MTW baseline.

The project-based Section 8 housing program experienced specific leasing issues at the new Gardens at San Juan Square. As mentioned above in the Public Housing section, the issues were a result of differences in policies and processes between the housing authority and traditional housing programs, third-party management, and the multi-financing requirements. In addition to the challenges mentioned above for Public Housing, the clients in the voucher program experienced confusion as to the project-based nature of the voucher. Many clients tried to use the voucher at other locations. The voucher program was able to mitigate these issues by conducting joint appointments with the third-party management staff, identifying on the voucher with a sticker and note that the voucher could only be used at the Gardens at San Juan Square, and conducting larger pulls off of the waiting list to ensure there were enough eligible applicants.

OTHER HOUSING LEASING (NON-PROFIT/PARTNERSHIPS):

There were no leasing issues at the Park at Sutton Oaks this fiscal year. The Gardens at San Juan Square experienced leasing issues for the PH and PBV units. Those issues and solutions are described above in the PH and Housing Choice Voucher sections.

(TABLES FROM FORM 50900)

As detailed in the tables below, SAHA served 111 households at local, non-traditional MTW units at the Park at Sutton Oaks and the Gardens at San Juan Square (see Section IV.A.FY2011-1e for more information).

Actual Number of Households Served at the End of the Fiscal Year

Housing Program:

Number of Households Served*

Planned

Actual

Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs **

N/A

111

Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs **

N/A

N/A

Port-In Vouchers (not absorbed)

N/A

N/A

Total Projected and Actual Households Served

0

111

* Calculated by dividing the planned/actual number of unit months occupied/leased by 12.

** In instances when a Local, Non-Traditional program provides a certain subsidy level but does not specify a number of Units/Households Served, the PHA should estimate the number of Households served.

Housing Program:

Unit Months Occupied/Leased****

Planned

Actual

Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Property-Based Assistance Programs ***

N/A

1,332

Number of Units that were Occupied/Leased through Local Non-Traditional MTW Funded Tenant-Based Assistance Programs ***

N/A

N/A

Port-In Vouchers (not absorbed)

N/A

N/A

Total Projected and Annual Unit Months Occupied/Leased

0

1,332

The Agency planned to lease 100% of all local, non-traditional MTW units at the Park at Sutton Oaks and the Gardens at San Juan Square; defined as non-Section 8/9 affordable units occupied by non-Section 8 households. Due to the nature of the MTW reporting requirement, it is impossible to plan how many of the non-Section 8/9 affordable units will be occupied by a household without a Section 8 voucher. Every reporting cycle, property management reviews rent rolls and determines how many non-Section 8/9 affordable units are occupied by a household without a Section 8 voucher. The reason units occupied by a household with a Section 8 voucher cannot be counted in the local, non-traditional unit category is because they are already being counted in the traditional Section-8 total.

*** In instances when a local, non-traditional program provides a certain subsidy level but does not specify a number of units/Households Served, the PHA should estimate the number of households served.

**** Unit Months Occupied/Leased is the total number of months the housing PHA has occupied/leased units, according to unit category during the year.

	Average Number of Households Served Per Month	Total Number of Households Served During the Year
Households Served through Local Non-Traditional Services Only	N/A	N/A

**Reporting Compliance with Statutory MTW Requirements:
75% of Families Assisted are Very Low-Income**

HUD will verify compliance with the statutory objective of “assuring that at least 75 percent of the families assisted by the Agency are very low-income families” is being achieved by examining public housing and Housing Choice Voucher family characteristics as submitted into the PIC or its successor system utilizing current resident data at the end of the Agency's fiscal year.

According to SAHA’s records, the Agency continues to meet this statutory objective by serving a total of 17,524 very-low income households (97%).

As of 6.30.2015			
	Total Households	Number below 50% AMI	% Below 50% AMI
PH	5,750	5,636	98%
Vouchers	12,090	11,799	98%
Other (Local, Non-Traditional)	156	89	57%
Total	17,996	17,524	97%

SAHA currently has two communities, the Park at Sutton Oaks and the Gardens at San Juan Square, which meet the definition of local, non-traditional housing. These communities were built using MTW funding and serve households with less than 80% AMI outside of Section 8 and Section 9 (PH). Below is information on local, non-traditional households provided with housing assistance at the end of the FY2015 fiscal year, not reported in PIC or its successor system:

Fiscal Year:	2011	2012	2013	2014	2015	2016	2017	2018
Total Number of Local, Non-Traditional MTW Households Assisted	N/A	N/A	N/A	58	156	N/A	N/A	N/A
Number of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	N/A	N/A	N/A	43	89	N/A	N/A	N/A
Percentage of Local, Non-Traditional MTW Households with Incomes Below 50% of Area Median Income	N/A	N/A	N/A	74%	57%	N/A	N/A	N/A

**Reporting Compliance with Statutory MTW Requirements:
Maintain Comparable Mix**

Baseline for the Mix of Family Sizes Served

Family Size:	Occupied Number of Public Housing units by Household Size when PHA Entered MTW	Utilized Number of Section 8 Vouchers by Household Size when PHA Entered MTW	Non-MTW Adjustments to the Distribution of Household Sizes *	Baseline Number of Household Sizes to be Maintained	Baseline Percentages of Family Sizes to be Maintained
1 Person	2,617	3,952	N/A	6,569	36%
2 Person	873	2,134	N/A	3,007	16%
3 Person	998	2,338	N/A	3,336	18%
4 Person	730	2,004	N/A	2,734	15%
5 Person	401	1,178	N/A	1,579	9%
6+ Person	317	917	N/A	1,234	7%
Totals	5,936	12,523	0	18,459	100%
Explanation for Baseline Adjustments to the Distribution of Household Sizes Utilized	<p>There are no non-MTW Adjustments to the distribution of household sizes. Baseline percentages of household sizes to be maintained were established using the most complete historical dataset that included household size. The reported data in the Agency's FY2011-2012 report for FY2011-1 Activity was used to set the baseline-- this is a snapshot of occupancy as of June 30, 2012. It is important to note that this form uses the term "Family Size". SAHA does not define nor track families; rather, the Agency tracks households and household size.</p>				

Mix of Family Sizes Served

	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	36%	16%	18%	15%	9%	7%	100%
Number of Households Served by Family Size this Fiscal Year ***	6,674	3,097	3,017	2,432	1,518	1,102	17,840
Percentages of Households Served by Household Size this Fiscal Year ****	37%	17%	17%	14%	9%	6%	100%
Percentage Change	5%	7%	-6%	-8%	-1%	-8%	0%
Absolute Percentage Change	2%	1%	-1%	-1%	0%	-1%	0%
Justification and Explanation for Family Size Variations of Over 5% from the Baseline Percentages	<p style="text-align: center;">While 2-person , 3-person, 4-person, and 6+ person households show a percent change over 5%, the absolute differences between the baseline and FY2015 is only 1.1%, -1.2%, -1.2%, and .05%, respectively. The overall range of absolute differences across all household sizes is 0% to 1.8%, indicating the Agency is still serving a comparable mix of households by household size.</p>						

* "Non-MTW adjustments to the distribution of family sizes" are defined as factors that are outside the control of the PHA. Acceptable "non-MTW adjustments" include, but are not limited to, demographic changes in the community's population. If the PHA includes non-MTW adjustments, HUD expects the explanations of the factors to be thorough and to include information substantiating the numbers used.

** The numbers in this row will be the same numbers in the chart above listed under the column "Baseline percentages of family sizes to be maintained."

*** The methodology used to obtain these figures will be the same methodology used to determine the "Occupied number of Public Housing units by family size when PHA entered MTW" and "Utilized number of Section 8 Vouchers by family size when PHA entered MTW" in the table immediately above.

**** The "Percentages of families served by family size this fiscal year" will reflect adjustments to the mix of families served that are directly due to decisions the PHA has made. HUD expects that in the course of the demonstration, PHAs will make decisions that may alter the number of families served.

Description of any Issues Related to Leasing of Public Housing, Housing Choice Vouchers or Local, Non-Traditional Units and Solutions at Fiscal Year End

Housing Program	Description of Leasing Issues and Solutions
Public Housing	<p>The Public Housing program experienced specific leasing issues at the new Gardens at San Juan Square. Specifically, as a result of the multi-layered financing of the property, the income restrictions for PH units were stricter. Traditionally, PH income restrictions allow new admissions of households with an income less than 80% AMI while the tax-credit requirement at this property required less than 30% AMI. As a result, 75% of PH applicants were deemed over-income. To add to this challenge, the tax-credit property calculates rent differently than the housing authority by counting expected income and child support that was not being received by the household. Another leasing issue at the property was slow processing time by the third-party management company which led to applicants having to re-submit paperwork to comply with the 45 day paperwork rule which states that all participant provided paperwork can be no more than 45 days old. Different criminal history policies also played a role in slower leasing. Public Housing was able to mitigate these initial challenges by creating a new process whereby third-party property management staff and SAHA admissions staff met with clients on the same day in the same office. In addition, multiple follow-up calls were placed to clients after their initial appointment to ensure the client follow-up through with a second appointment. As of June 30, 2015, all Public Housing units at the property were leased.</p>
Housing Choice Voucher	<p>During the fiscal year SAHA was in a shortfall position and opted to apply for Set Aside funding. To qualify for the set aside funding PHAs were required to cease lease up activities immediately, through January 2014. In October 2013, SAHA received official notification from HUD that our Set Aside Funding application had been denied. SAHA developed a lease up plan and began selecting applicants from the wait list in December 2013 and each month through the end the fiscal year. The lease-up activity continued this fiscal year.</p> <p>This fiscal year, SAHA selected approximately 17,500 applicants from the waiting list and issued a total of 2,400 vouchers. The response rate from selected applicants was approximately 25%, due largely to outdated applicant contact information (e.g., mailing addresses) in SAHA's records. Currently, SAHA is purging its HCV waiting list. Due to the number of applicants selected from the waiting list who had preferences that could not be verified at the time of eligibility, SAHA increased the number of additional applicants selected from the waiting list. In addition, the success rate of applicants who leased up after voucher issuance was approximately 16%. SAHA will continue to select applicants from the waiting list in order to meet the established</p>

	<p style="text-align: center;">MTW baseline.</p> <p>The project-based Section 8 housing program experienced specific leasing issues at the new Gardens at San Juan Square. As mentioned above in the Public Housing section, the issues were a result of differences in policies and processes between the housing authority and traditional housing programs and the third-party management and the multi-financing requirements. In addition to the challenges mentioned above for public housing, the clients in the voucher program experienced confusion as to the project-based nature of the voucher. Many clients tried to use the voucher at other locations. The voucher program was able to mitigate these issues by conducting joint appointments with the third-party management staff, identifying on the voucher with a sticker and note that the voucher could only be used at the Gardens at San Juan Square, and conducting larger pulls off of the waiting list to ensure there were enough eligible applicants.</p>
<p style="text-align: center;">Local, Non-Traditional Units</p>	<p>There were no leasing issues at the Park at Sutton Oaks this fiscal year. The Gardens at San Juan Square experienced leasing issues for the PH and PBV units. Those issues and solutions are described above in the PH and Housing Choice Voucher sections.</p>

Number of Households Transitioned To Self-Sufficiency by Fiscal Year End

For MTW reporting purposes, SAHA has defined self-sufficiency as a PH household who is paying a flat rent for at least 6 months or a HCV household utilizing a zero HAP voucher for at least 6 months. The logic is that if a household is able to pay the full amount of their housing cost without subsidy from the Agency, than they have achieved a level of economic stability. Detailed below are the results of FY2015.

Activity Name/#	Number of Households Transitioned *	Agency Definition of Self Sufficiency
FY2013-1: Time-limited Working Preference	0	Households in Public Housing paying a flat rent for at least 6 months.
FY2013-2: Simplified Earned Income Disregard	0	Households in Public Housing paying a flat rent for at least 6 months.
FY2014-4 Biennial Reexaminations	13	Households in Public Housing paying a flat rent for at least 6 months and households in the voucher program with zero housing assistance (HAP) for at least 6 months (includes households who have ended participation, as a result)
MTW Households (General across all housing programs under the MTW demonstration)	32	Households in Public Housing paying a flat rent for at least 6 months and households in the voucher program with zero housing assistance (HAP) for at least 6 months (includes households who have ended participation, as a result)

Households Duplicated Across Activities/Definitions	13
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* The number provided here should match the outcome reported where metric SS #8 is used.

ANNUAL TOTAL NUMBER OF HOUSEHOLDS TRANSITIONED TO SELF SUFFICIENCY	32
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C. WAITING LIST INFORMATION

At the end of FY2015, SAHA had a total of 45,876 households on a wait list. Each wait list and its respective information are detailed below.

(TABLES FROM FORM 50900)

Wait List Information at Fiscal Year End

Housing Program(s) *	Wait List Type **	Number of Households on Wait List	Wait List Open, Partially Open or Closed ***	Was the Wait List Opened During the Fiscal Year
Federal MTW Public Housing Units	Site-Based	18,842	Open	No
Federal MTW Housing Choice Voucher Program and Federal non-MTW Housing Choice Voucher Program	Community-Wide	27,659	Open	No
Federal non-MTW Housing Choice Voucher Program: Moderate Rehabilitation	Moderate Rehabilitation	15,427	Open	No
Project-Based Local	Local Project Based	16,208	Open	No

* Select Housing Program: Federal MTW Public Housing Units; Federal MTW Housing Choice Voucher Program; Federal non-MTW Housing Choice Voucher Units; Tenant-Based Local, Non-Traditional MTW Housing Assistance Program; Project-Based Local, Non-Traditional MTW Housing Assistance Program; and Combined Tenant-Based and Project-Based Local, Non-Traditional MTW Housing Assistance Program.

** Select Wait List Types: Community-Wide, Site-Based, Merged (Combined Public Housing or Voucher Wait List), Program Specific (Limited by HUD or Local PHA Rules to Certain Categories of Households which are Described in the Rules for Program Participation), None (If the Program is a New Wait List, Not an Existing Wait List), or Other (Please Provide a Brief Description of this Wait List Type).

*** For Partially Open Wait Lists, provide a description of the populations for which the waiting list is open.

If Local, Non-Traditional Program, please describe: NA

If Other Wait List Type, please describe: NA

If there are any changes to the organizational structure of the wait list or policy changes regarding the wait list, provide a narrative detailing these changes.

Effective January 1, 2015, the Housing Choice Voucher wait list eliminated the option for applicants to select preferences. However, any applicant on the wait list prior to January 1, 2015 retained their original application with the preferences. In June 2014, the Public Housing program stopped enrolling new participants in the Time Limited Working Preference Pilot Program (FY2013-1). The activity allows the Agency to select up to 200 households for the pilot based on a working preference. The first cohort of pilot participants included 28 households. The agency expects to start enrolling a new

cohort of pilot households in the next fiscal year. At which time, the working preference will be re-activated.

III. PROPOSED MTW ACTIVITIES

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

IV. APPROVED MTW ACTIVITIES

A. IMPLEMENTED ACTIVITIES

FY2011-1E – PRESERVATION AND EXPANSION OF AFFORDABLE HOUSING

Statutory Objective: Increase Housing Choices

1. Approved/Implemented: FY2011/FY2011

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

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

This activity is designed to increase housing choices. It operationalizes the preservation and expansion policies adopted in FY2011, by utilizing the local, non-traditional unit authorization under SAHA's broader uses of funds authority and securing the approval to combine RHF funds into the MTW block grant to construct new affordable units (defined as units reserved for households with income at or below 80% AMI). While SAHA may develop new communities with market-rate units in addition to affordable units; this activity does not authorize the use of RHF funds for the

**HOUSEHOLDS HAVE ACCESS TO
252 NEW AFFORDABLE UNITS—
63 PUBLIC HOUSING AND 31 PROJECT-
BASED VOUCHERS (30% AMI)
27 HOME (50% AMI)
131 TAX-CREDIT (60% AMI)**



Former SAHA President and CEO Lourdes Castro Ramirez (now Principal Deputy Assistant Secretary, leading the Office of Public & Indian Housing at the U.S. Department of Housing and Urban Development), Mayor Ivy R. Taylor, and Councilwoman Shirley Gonzales join SAHA Commissioners and other partners and residents for the grand opening of the Gardens at San Juan Square.

**THE GARDENS AT SAN JUAN
SQUARE
A MIXED-INCOME COMMUNITY
WITH 252 UNITS
ON THE CITY'S NEAR WEST SIDE**



development of those market-rate units. It is also important to note that SAHA's flexibility to construct and/or preserve new Section 8/9 units are authorized under the single-fund flexibility only and outcomes are reported in the sources and uses section of this report (Section V). The only units authorized under this activity are units reserved for households with income at or below 80% AMI that are non-Section 8/9.

This fiscal year, the Agency completed the Gardens and San Juan Square, a mixed-income community with 252 units, of which 63 units are Section 9 (Public Housing), 31 units are Section 8 (Project-Based Vouchers), and 158 affordable and non-Section 8/9 (Tax-Credit and HOME units). This community is 100% reserved for households with income at or below 80% AMI.

SAN JUAN HOMES
(before)



THE GARDENS AT SAN JUAN SQUARE
(after)



2i. Hardships: This activity is not a rent reform activity; therefore, this MTW reporting element is not required.

3. Challenges/Potential New Strategies: Mixed-finance developments are very challenging to complete in the current funding environment. SAHA has utilized multiple funding sources in the past, including: tax credits, HOME funds, and other state and local funding. This year, SAHA was able to add MTW funding to the list of funding streams available for the third phase of the San Juan Homes redevelopment. This new funding source allowed SAHA to close the funding gap and continue to expand affordable housing in San Antonio.

4. Benchmark/Metric Revisions: In the FY2015 plan, SAHA stated the Agency planned to preserve 121 units in FY2015 and 471 over the next five years in the public housing portfolio. While the Agency is still planning to preserve these units, because they are traditional Public Housing units (Section 9) they should not be reported in this activity. As noted above, this activity is to track the MTW investment in non-Section 8/9 units that are affordable to households earning less than 80% AMI. The preservation of Section 9 (Public Housing units) is reported on in Section II. A under "General Description of Actual Capital Fund Expenditures

during the Plan Year". Currently, SAHA has no plans to invest MTW funding to preserve non-Section 8/9 units. MTW investments are planned for expansion only.

Data Collection: SAHA collects data on developed units and households from the third-party management company. The expenditure of MTW funds is tracked through the Agency’s JDE system.

HUD STANDARD METRICS

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box. The Gardens at San Juan Square 158 total units : 27 HOME units reserved for <50% AMI households 131 Tax-Credit units reserved for <60% AMI households.	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	Actual housing units of this type after implementation of the activity (number).	Benchmark met.
	0	610 (5-year) 113 (Year 1) 158 (Year 2)	Year 1: 113 Year 2: 158 Year 2 Cumulative: 271	
HC #2: Units of Housing Preserved				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of housing units preserved for households at or below 80% AMI that would otherwise not be available (increase). If units reach a specific type of household, give that type in this box.	Housing units preserved prior to implementation of the activity (number).	Expected housing units preserved after implementation of the activity (number).	Actual housing units preserved after implementation of the activity (number).	Benchmark met.
	0	0	0	

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

1. Approved/Implemented: FY2011/December 2011

2. Description: SAHA allocates 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).

CHCS and SAMM provide a needs assessment of the household in order to qualify and certify them as homeless as defined by HUD. Once the household is determined eligible by CHCS and

SAMM, the household is referred by CHCS/SAMM to SAHA and placed on the waiting list. When the household is selected from the SAHA waiting list, SAHA processes all referrals in accordance with HUD guidelines and the SAHA voucher program Administrative Plan. The household is scheduled for an appointment with SAHA staff to determine eligibility. Once the household is determined eligible they complete documents necessary for processing. One requirement of the program is that CHCS and SAMM provide intensive case management for one year to every household participating in the program. CHCS and SAMM provide reports to SAHA on a quarterly basis.

The set-aside program was implemented in December 2011. Of the 221 set-aside vouchers leased since implementation, 129 remain housed of which 112 have been housed for more than 24 months. An additional 8 households were actively searching for a unit in June 2015 and have not been included in this fiscal year outcomes.

2i. Hardships: This activity is not a rent reform activity; therefore, this MTW reporting element is not required.

SAHA HAS LEVERAGED INTENSIVE SUPPORTIVE SERVICES FOR
221
HOUSEHOLDS SINCE 2012
FOR EVERY YEAR SAHA ALLOCATES 200 SET-ASIDES FOR THE HOMELESS, THERE IS AN ESTIMATED
\$4,449,600
IN MEDICAL COST SAVINGS DUE TO HEALTH IMPROVEMENTS AND BETTER COORDINATION OF CARE.¹

¹According to LIIF's Social Impact Calculator: Permanent Supportive Housing as a Vaccine. "Permanent supportive housing is well known as an effective strategy for improving life outcomes for the chronically homeless—particularly those with chronic and complex illnesses. This intervention also generates significant public cost savings, primarily from reduced health services. We draw from a 2009 study by the Economic Roundtable to estimate medical cost savings. The study specifically found that incremental monthly cost savings to public agencies (e.g., County health services outpatient clinics) and agency sub-departments (e.g., corrections medical services) providing physical and mental health services were \$1,853 per month, or \$22,242 per year, for the chronically homeless living in permanently supportive housing. We use this figure to estimate medical cost savings over the course of a project's affordability restriction term." Source: <http://www.liifund.org/calculator-tool/>

3. Challenges/Potential New Strategies: Effective April 2013, SAHA ceased all lease-up activity due to the funding environment. Lease-up activity resumed in January 2014 and SAHA requested referrals from current partners to increase utilization. During this fiscal year, SAHA continued an aggressive lease-up effort to return utilization rates to prior ceased lease-up rates in early 2013.

4. Benchmark/Metric Revisions: Benchmarks for this activity have not been revised; SAHA continues to set-aside 200 tenant-based vouchers for this initiative.

5. Data Collection: SAHA continues to track the leasing of set-aside vouchers using Elite housing database.

HUD STANDARD METRICS

HC #7: Households Assisted by Services that Increase Housing Choice				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase housing choice (increase).	Households receiving this type of service prior to implementation of the activity (number). This number may be zero.	Expected number of households receiving these services after implementation of the activity (number).	Actual number of households receiving these services after implementation of the activity (number).	Benchmark not met. SAHA continues to request referrals from partners to increase utilization for this program.
	0	200	As of June 30, 2015: CHCS: 58 units leased SAMM: 71 units leased Total: 129 units	

SAHA METRICS

Maintain Households Served				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Percentage of households served that continue to be housed after 2 years	0	90%	112/195 = 58%	Benchmark not met. SAHA continues to request referrals from partners to increase utilization for this program.
			195 households were served during fiscal year while 58% continue to be served after 24 months.	

FY2013-1 – TIME-LIMITED WORKING HOUSEHOLD PREFERENCE PILOT PROGRAM

Statutory Objective: Increase Housing Choices and Promote Self-Sufficiency

1. Approved/Implemented: FY2013/January FY2014

2. 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 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 became available, SAHA informed 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 ensures the applicants understand that a time limit, work requirement, and Family Self-Sufficiency (FSS) participation are all required with the preference as stated in their rental lease.

Each FSS household receives case management services from an FSS Case Manager who maintains close communication with the household and works with them to develop an Individual Training and Service Plan (ITSP). The ITSP establishes specific interim and final goals to measure the household's progress toward fulfilling its obligations and becoming self-sufficient.

This fiscal year, one household moved out of subsidized housing, one household moved into the housing choice voucher program, and two households were involuntarily moved out due to criminal activity and non-payment. The total number of households in the first cohort of the pilot is now twenty-four. Of the 24 households, 20 were working at fiscal year-end and one household has since gained employment. Case management staff are working with the remaining 3 households to obtain employment again.

2i. Hardships: Hardship policies mirror FSS practices and policies: SAHA can extend the term of the assistance up to 2 years if the household provides a written request for an extension and SAHA finds that good cause exists for the extension. SAHA does not expect to see any hardship requests until 2019 when the first cohort of participants nears their 5-year term limit.

3. Challenges/Potential New Strategies: The Agency has faced several challenges with the implementation of this activity. The FY2014 MTW plan was not approved by HUD until the end of the first quarter of FY2014 on September 4, 2013. Also, the Time-limited Working Household Preference Pilot program could only be initiated after the completion of significant software changes and the roll out of a new on-line application process. As a result, the total number of households selected for the pilot during the first fiscal year was below the benchmark of 200. The Agency has had other technical challenges related to software changes that would allow the efficient tracking of households across multiple systems.

This fiscal year, the agency made a strategic decision to freeze the enrollment of additional pilot participants due to portfolio-wide public housing leasing issues. The agency plans to start enrollment of the second pilot cohort in FY2016.

In FY2016, the agency plans to implement quarterly meetings with property management and case management staff to provide better coordinated services to these pilot households. As part of these meetings, staff will be conducting more in-depth reviews of current household situations and ensure property management and case management are working together to equip households to go off of subsidized housing within their 5 year term.

4. Benchmark/Metric Changes: There have been no substantial changes to the metrics for this activity; however, the agency plans to revisit the metric “Decrease in Waitlist time” in FY16.

5. Data Collection: Currently, the data collected for this activity is managed by manually tracking the list of new admissions that are housed under this preference and querying the Agency’s Elite housing software system for additional activity metrics.

HUD STANDARD METRICS

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Benchmark not met.
	\$10,400	\$11,440	\$10,198.42	
SS #3: Increase in Positive Outcomes in Employment Status				
<i>Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?

(6) Other (Heads with any Earned Income)	Heads of households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number).	Actual head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number).	Benchmark not met.
	0	200	18 (16 households with heads working plus 2 households with spouses working)	
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Actual percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Benchmark not met.
	0	100%	75%	
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
	0	0	0	

SS #5: Households Assisted by Services that Increase Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Benchmark not met.
	0	200	24	
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
	0	0	0	
HC #3: Decrease in Wait List Time				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average applicant time on wait list in months (decrease).	Average applicant time on wait list prior to implementation of the activity (in months).	Expected average applicant time on wait list after implementation of the activity (in months).	Actual average applicant time on wait list after implementation of the activity (in months).	Benchmark not met.
	16.8 months (1.4 years)	2 months	2.5 years	

SAHA METRICS

<i>Average Years of Participation</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average time spent on assistance (yr)	0	Year 1- 0 (Year 5- 5)	1 year	Benchmark met.
<i>Hardship Rate</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rate of hardship requests	0	5% of number of participants	0	Benchmark met.

FY2013-2 – SIMPLIFIED EARNED INCOME DISREGARD (SEID)

Statutory Objective: Promote Self-Sufficiency and Reduce cost and increase cost effectiveness

1. Approved/Implemented: FY2013/FY2014

2. 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%

101 WORKING HOUSEHOLDS
HAVE COLLECTIVELY KEPT AN
ESTIMATED
\$970,000
OF THEIR EARNED INCOME IN
YEAR 2 OF FULL
IMPLEMENTATION;
EQUAL TO
**A FULL YEAR'S WORTH OF
CHILDCARE FOR EACH
HOUSEHOLD²**

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

2i. Hardships: There has been no hardship requests associated with this activity.

3. Challenges/Potential New Strategies: Challenges for this activity, which are consistent with many of SAHA's initiatives, is: funding, coordinating with a software vendor, and testing custom programming. SAHA expected custom programming for SEID to be completed by the software vendor by the fall of 2014; however, this process was delayed due to other programming needs from the vendor taking priority as well as technical issues with the final programming deliverable. The Agency is currently testing the programming and anticipates implementation in the fall of 2015.

In addition, this fiscal year, the Agency saw an increase in error rate for the processing of these household's paperwork. This is likely a result of high staff turnover at the property and associated training needs. SAHA's Internal Audit team is working with property management to ensure proper processing.

²According to MIT's Living Wage Calculator, a family with 1 adult and 2 children pays an estimated \$717 per month in childcare expenses. Households on SEID kept an average of \$9,606 in wages in FY2015. Source: <http://livingwage.mit.edu/>

4. Benchmark/Metric Changes: There have been no substantial changes to the metrics for this activity.

5. Data Collection: Currently, the data collected for this activity is managed by manually tracking the list of households that are receiving SEID and querying the Agency’s Elite housing software system for additional activity metrics. As a result of new HUD requirements under the revised 50900 form, the Agency continues to focus on establishing a plan that will eliminate the manual tracking of households affected by this policy to alleviate the reporting burden of additional metrics.

HUD STANDARD METRICS

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$11,000	\$12,100	\$16,154	Benchmark met.
SS #3: Increase in Positive Outcomes in Employment Status				
<i>Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number).	Actual head(s) of households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	100	94 Heads/Co-Heads/Spouses out of 95 workable households (Household where	Benchmark met.

			Head/Co-Head/or Spouse is non-elderly/non-disabled)	
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Actual percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
	0	100%	99%	Benchmark met.
SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	0	2	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #8: Households Transitioned to Self Sufficiency				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households	Households transitioned to self-	Expected households	Actual households transitioned to self-	Whether the outcome meets

transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	sufficiency (Number of households paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero.	transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).	or exceeds the benchmark.
	0	FY2014: 0 (FY2018: 40)	0	Benchmark met.

CE #1: Agency Cost Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$4,884 (200 HOURS * \$24.42)	\$4,884 (200 HOURS * \$24.42)	\$2,466.42 (101 HOURS * \$24.42)	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

CE #2: Staff Time Savings

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.

	200	200	101	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	13.22	10.62 (3% decrease)	19	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$130,284	\$130,284	\$94,884	Activity is not designed to impact metric;

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

<i>Number of Household Members who take advantage of disregard (average)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of Household Members who take advantage of disregard (average)	1	1.5	1	Benchmark not met.
<i>SS #5: Households Assisted by Services that Increase Self Sufficiency</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	200	101	Benchmark not met.

FY2013-4 – HQS INSPECTION OF SAHA-OWNED NON-PROFITS BY SAHA INSPECTORS

Statutory Objective: Reduce cost and increase cost effectiveness

1. Approved/Implemented:
FY2013/FY2013

2. Description: This activity allows SAHA inspectors (instead of third-party contractors) to inspect and perform rent reasonableness assessments for units at properties that are either owned by SAHA under the Agency’s non-profit portfolio or owned by a SAHA affiliate under the Agency’s partnerships portfolio. At the time of implementation, SAHA’s Inspections Department was equipped to absorb the additional inspections without the need to add additional full-time or part-time equivalent positions. The cost of hiring a third-party contractor is \$76.32 per inspection; while the cost to perform the inspection in-house is only \$20.86 per inspection.

In year 1 of implementation, SAHA completed 1,758 inspections, saving the Agency over \$97,000. In year 2 of implementation, SAHA completed a total of 3,045 inspections, saving the Agency over \$160,000.

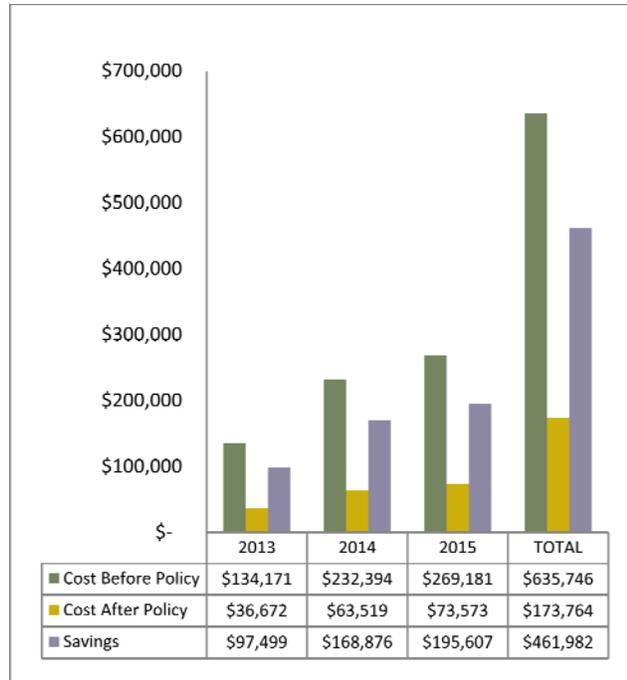
This fiscal year, SAHA completed a total of 3,527 inspections, saving the Agency over \$195,607 for a cumulative savings of \$461,982.

2i. Hardships: This activity is not a rent reform activity; therefore, this MTW reporting element is not required.

3. Challenges/Potential New Strategies: SAHA will continue to monitor the cost savings to ensure the inspection cost remains below third-party cost levels and the number of inspections continues to be effectively absorbed by current staffing levels.

4. Benchmark/Metric Revisions: Benchmarks for this activity have not been revised.

OVER 8,300 INSPECTIONS HAVE BEEN COMPLETED IN THE LAST THREE FISCAL YEARS, SAVING THE AGENCY \$461,982



5. **Data Collection:** SAHA continues to track this activity using Elite housing database.

HUD STANDARD METRICS

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark
	1,758 inspections * \$76.32 = \$134,171	1,758 inspections * \$20.86 = \$36,671.88	3,527 inspections * \$20.86 = \$73,573.22	Benchmark was met. 3,527 inspections at \$76.32 per inspection would have cost the Agency \$275,592. The Agency saved \$195,607 this fiscal year.
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	0 hours	3,045 inspections x .5 hours = 1,522.5 hours	3,527 inspections x .5 hours = 1,763.5 hours	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

FY2014-2 – EARLY ENGAGEMENT (PREVIOUSLY REFERRED TO AS PATH TO SELF-SUFFICIENCY)

Statutory Objective: Promote Self-Sufficiency

1. Approved/Implemented: FY2013/January 2014

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

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

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

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

1,482 HOUSEHOLDS BEGAN
THEIR PATH TO SELF-
SUFFICIENCY BY COMPLETING
A SET OF COURSES
DESIGNED TO:

1. BUILD CAPACITY TO BECOME SUCCESSFUL RESIDENTS
2. ESTABLISH CLEAR EXPECTATIONS
3. MINIMIZE CRISIS SITUATIONS OVER THE LONG TERM



Residents learning about common housing pests

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

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

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

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

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

2i. Hardships: This activity is not a rent reform activity; therefore, this MTW reporting element is not required.

3. Challenges: This fiscal year, the Agency surpassed the benchmark of 480 by serving 1,482 households through the Early Engagement Program. There were a total of 13 early engagement sessions with 314 participating vendors. We have seen a slight increase in negative exits in the Public Housing program and a reduction in negative exits in the Housing Choice Voucher program. Public Housing, Housing Choice Voucher program, and the agency's Community Development Initiatives Department will be looking at negative exits and the specific reasons to adjust early engagement programming, as needed.

In the first year of implementation (FY2013-2014), the largest challenge to implementing an activity that requires all new admissions to attend early engagement sessions lasting 4 hours is managing the logistics. The Agency spent the first two quarters of the first fiscal year working with partners to develop curriculum and secure a venue to accommodate 200 plus attendees.

Also, this activity required changes to the Public Housing and voucher program admissions process. Prior to this activity, Public Housing and the voucher program wait lists were managed separately. As part of a non-MTW cost-efficiency initiative, this fiscal year the Agency moved to a unified application process whereby all households on any wait list (Public Housing, Housing Choice Voucher, or other special programs) are screened for eligibility by the Unified Application Center (UAC), a centralized applications department for all SAHA housing programs.

When Early Engagement was implemented in January of 2014, residents who were called off the waiting list were required to attend Early Engagement before their eligibility appointment with the UAC. As a result, many of the attendees at the first several sessions never became residents in SAHA’s housing programs due to various eligibility reasons, including but not limited to households being over the income limit when earned income verification was completed or households who were unable to provide supporting documentation for a wait list preference. In order to address this issue and better manage limited resources, the Agency began meeting with households who were called off the waiting list to establish eligibility prior to attending Early Engagement sessions.

4. Benchmark/Metric Changes: The metrics for this activity have not substantially changed.

5. Data Collection: Currently, the Agency counts the number of attendees manually and issues certificates to households completing the Early Engagement sessions. The UAC logs the household’s certificate in the file notes in the Elite housing database system when the resident is provided a voucher or unit. This fiscal year, SAHA identified a method to flag these households in the housing database. Staff are currently undertaking the process of flagging past EEP participants. The agency expects to be able to report on the EEP only metrics in FY2016.

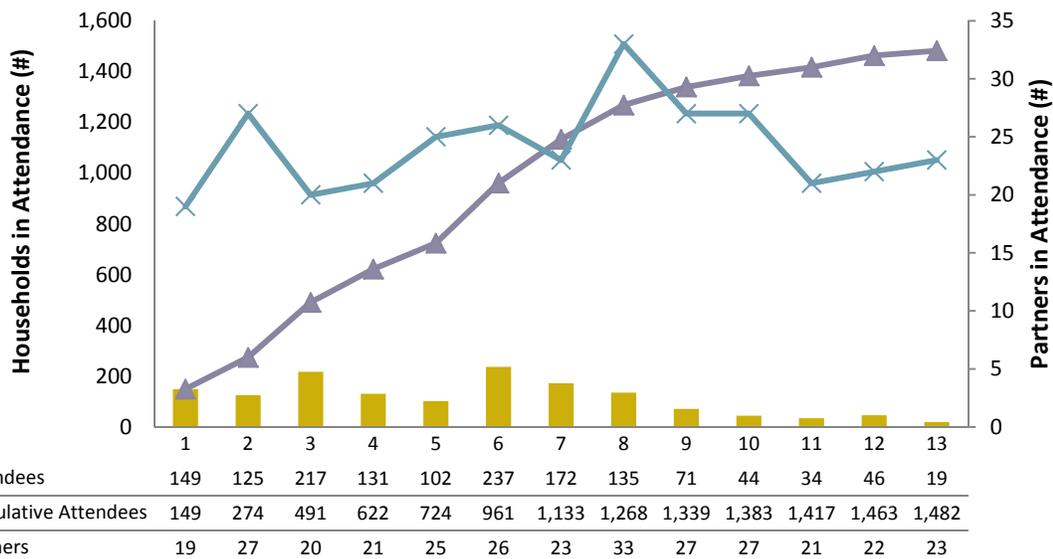
HUD STANDARD METRICS

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

SAHA METRICS

<i>Negative Program Exits (All) (HCV)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households exiting the housing program for a negative reason (decrease)- report as monthly average	44	40	31	Benchmark met.
<i>Negative Program Exits (All) (PH)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households exiting the housing program for a negative reason (decrease)- reported as monthly average	41	37	53	Benchmark not met.
<i>Negative Program Exits (EEP only) (HCV)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households exiting the housing program for a negative reason (decrease)- report as monthly average	Values forthcoming in FY2016 after data entry is completed			
<i>Negative Program Exits (EEP only) (PH)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households exiting the housing program for a negative reason (decrease)- reported as monthly average	Values forthcoming in FY2016 after data entry is completed			

Early Engagement Attendance



FY2014-3 – FASTER IMPLEMENTATION OF PAYMENT STANDARD DECREASES (HCV)

Statutory Objective: Reduce cost and increase cost effectiveness

1. Approved/Planned Implementation: FY2014/when FMR is reduced and SAHA payment standards are reduced.

2. Description: This activity is designed to reduce cost and increase cost effectiveness, and was originally approved as part of the FY2013-2014 MTW Plan. The Agency did not use this waiver in FY2015.

Currently, when Fair Market Rent (FMR) is reduced and the payment standard is adjusted accordingly, the reduced payment standard is applied at each participant’s second regular reexamination. This activity will allow SAHA to apply the lower payment standards at each participant’s next reexamination (Move, Interim and/or Annual reexaminations). If the participant’s rent portion increases as a result of applying the new payment standard, SAHA will provide the participant a 30-day notice of rental increase.

The per unit cost will be calculated by the total housing assistance payments divided by the total number of units leased each month. The housing assistance payments expense will be obtained from the monthly financial statements and the total units will be obtained from the Unit Month Report.

HUD STANDARD METRICS

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

FY2014-4 – BIENNIAL REEXAMINATIONS (HCV AND PH)

Statutory Objective: Reduce cost and increase cost effectiveness

1. Approved/Implemented: FY2014/January 2014

2. Description: The FY2011-3 Biennial Reexamination activity was approved and implemented for HCV and PH in FY2011. This activity allowed SAHA to conduct biennial reexaminations instead of regular annual reexaminations for elderly and/or disabled households on a fixed income. Due to the success of this activity at SAHA and other MTW agencies, biennial reexaminations were expanded to include all

households in public housing and non-elderly/non-disabled households in HCV (reexaminations for the elderly/disabled households in HCV are now under a triennial schedule as outlined FY2015 - see FY2014-5 in Section IV.B.). For reporting purposes, this activity was closed out in FY2013 and a new activity, FY2014-4 was created.

The FY2014-4 activity allows SAHA to conduct biennial reexaminations for all non-elderly/disabled HCV and all PH participant households (approximately 8,500 households in HCV and 5,900 households in PH). Every household has the option of interim reexamination at any time, if there is a change in household composition, reduction in income, or an increase in expenses. Both departments implemented biennial reexaminations on the new eligible households in January 2014.

For the HCV program, the activity was implemented in January 2014 for households with a reexamination date in May 2014. Half of the eligible households with a May 2014 reexamination date were randomly selected for the biennial schedule. These households were seen by SAHA staff in FY2013 and will not complete their next reexamination until FY2015. All other households were seen by SAHA staff for their regularly schedule reexaminations in FY2014, at which time they were placed on the biennial schedule. These households will not complete another reexamination until FY2016. This method of randomization continued for each month's scheduled reexaminations until April 2015 when the activity was fully implemented. All new households are placed on the biennial schedule, as they are admitted.

For the PH program, the activity was implemented in January 2014, for all households with a reexamination date in the time period between January 1, 2014 and June 30, 2014. These households were seen by SAHA staff in FY2014 and will not complete their next reexamination until FY2016. Households with a reexamination date that occurred in the time period between July 1, 2013, and December 31, 2013, were put on the biennial schedule at their next reexamination in FY2015. These households will not complete their next reexamination until FY2017.

**AS A RESULT OF EXPANDING AN
ALTERNATE REEXAMINATION
SCHEDULE, THE AGENCY IS POSITIONED
TO SAVE AN ESTIMATED
\$300,000
PER YEAR, WHICH EQUATES TO
SERVING **40** MORE
HOUSEHOLDS IN THE HOUSING CHOICE
VOUCHER PROGRAM**

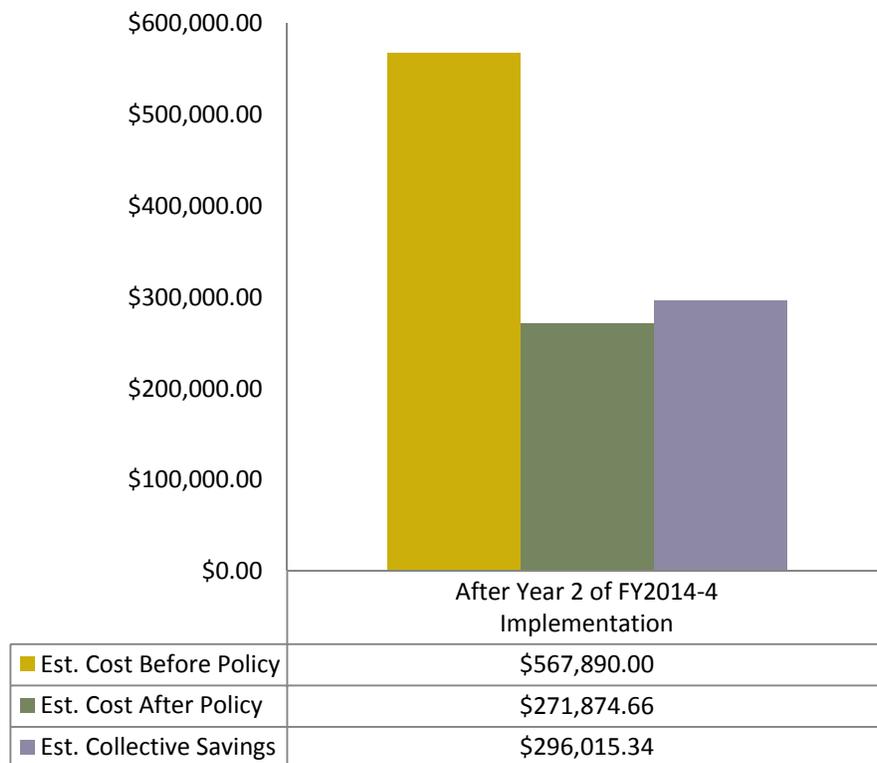
In order to meet program requirements, FSS participants will maintain an annual reexamination schedule. Participants in other programs that require regular reexaminations will also maintain an annual reexamination schedule.

Collective Impact of FY2011-3 (Biennials for Fixed Income Households only- now closed out) and FY2014-4 (Expanded Biennials)

If the Agency followed the regular annual reexamination schedule, the cost for all PH households and HCV households eligible under FY2014-4 is estimated to be almost \$550,000 per year (6,000 PH households and 13,000 HCV households multiplied by FY2015 cost). By converting to a biennial schedule, the estimated savings to the Agency is almost \$300,000 annually. Using end of year housing assistance payment (payments that SAHA pays a landlord) for the average voucher household (\$585.50), those savings translate into the ability to serve over 40 additional households every year.

The chart below demonstrates the collective savings based on FY2011-3 (Biennial Reexamination for households on fixed income, which is superseded by FY2014-4) and FY2014-4.

Estimated Collective Annual Impact of FY2011-3 (Biennials for Fixed Income Households) and FY2014-4 (Expanded Biennials)



2i. Hardships: There has been no hardship requests associated with this activity.

3. Challenges/Potential New Strategies: None.

4. Benchmark/Metric Changes: There has been no substantial change to the metrics for this activity; however, HCV updated the salary from \$15.10 to \$21.95 to include both salary and benefits and PH updated salaries for Customer Service Specialist (CSS) (\$21.34 to \$22.82) and for managers (\$30.16 to \$36.97). Also, the baseline and benchmark for SS#1 Increase in Household Income was set using the average total income after exclusions for all households active as of June 30, 2014. Since the metric is measuring earned income only, the baseline and benchmarks have been re-set using the same data reporting on total wage income before exclusions from \$9,839 to \$3,001.39. The Agency is reporting on earned income before exclusions to account for households who are enrolled in the simplified earned income disregard activity—because this earned income is excluded, the after exclusions income does not reflect the true earned income of the household. The earned income for households impacted by this activity is low due to the fact that the figure includes fixed income households in addition to workable and working households. This activity is not intended to impact household income and it only being tracked for MTW standard metric reporting requirements, as noted in the table below.

5. Data Collection: Both HCV and PH, collects data on the total number of biennials processed in the Elite housing database.

HUD STANDARD METRICS

CE #1: Agency Cost Savings (PH)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Cost reduction on reexamination process	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark
	$((4,701 \text{ Biennials} * 2 \text{ hours of staff time}) * 75\% \text{ (for CSS Staff)} * \$21.34 \$22.83) + ((\# \text{ Biennials} * 2 \text{ hours of staff time}) * 25\% \text{ (for Manager Approval Time)} * \$30.16 \$36.97)$	$((4,701 \text{ Biennials}/2) * 2 \text{ hours of staff time}) * 75\% \text{ (for CSS Staff)} * \$21.34 \$22.83 + ((\# \text{ Biennials} * 2 \text{ hours of staff time}) * 25\% \text{ (for Manager Approval Time)} * \$30.16)$	$((3,807 \text{ Biennials} * 2 \text{ hours of staff time}) * 75\% \text{ (for CSS Staff)} * \$21.34 \$22.83) + ((\# \text{ Biennials} * 2 \text{ hours of staff time}) * 25\% \text{ (for Manager Approval Time)} * \$30.16 \$36.97)$	

		\$36.97)		
	\$221,370.09 \$247,883.73	\$110,685.05 \$123,941.87	\$200,743.11	Benchmark not met due to more biennials being processed than expected.
CE #2: Staff Time Savings (PH)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Staff time spent on reexaminations	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	4,701 Biennials * 2 hours of staff time	4,701 Biennials/2 * 2 hours of staff time	3,807 Biennials * 2 hours of staff time	
	9,402 hours	4,701 hours	7,614 hours	Benchmark not met due to more biennials being processed than expected.
CE #5: Increase in Agency Rental Revenue (PH)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$10,029,168	\$10,029,168	\$10,123,258	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

SS #1: Increase in Household Income (PH)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase). (Total Households Wage income before exclusions)	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$9,839 \$3,001.39	\$9,839 \$3,001.39	\$3,265.22	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #3: Increase in Positive Outcomes in Employment Status (PH)				
<i>Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
(6) Other (Heads with any Earned Income)	Number of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected number of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity.	Actual number of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
	0	1,175	1,398	Activity is not designed to impact metric; metric is included

				for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Actual percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
	0	22.32%	24.33%	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
<i>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) (PH)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	75	75	76	Activity is not designed to impact metric;

				metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #8: Households Transitioned to Self Sufficiency (PH)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
<p>Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.</p>	<p>Households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) prior to implementation of the activity (number). This number may be zero.</p>	<p>Expected households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).</p>	<p>Actual households transitioned to self-sufficiency (Number of households paying a flat rent for at least 6 months) after implementation of the activity (number).</p>	<p>Whether the outcome meets or exceeds the benchmark.</p>
	0	0	0	<p>Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.</p>

CE #1: Agency Cost Savings (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
<p>Total cost of task in dollars (decrease).</p>	<p>Cost of task prior to implementation of the activity (in</p>	<p>Expected cost of task after implementation of the activity (in</p>	<p>Actual cost of task after implementation of the activity (in</p>	<p>Cost of task prior to implementation of the activity (in</p>

	dollars).	dollars).	dollars).	dollars).
	\$15.25 \$21.95 * (8,500 reexams * 1 hour)	\$15.10 \$21.95 * (4,250 reexams * 1 hour)	\$21.95*(4,198 Biennials* 1 hour)	Benchmark met.
	\$128,350/yr \$186,575/yr	\$64,175/yr \$93,287.50/yr	\$92,146.10	

CE #2: Staff Time Savings (HCV)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	8,500 potential biennials multiplied by 1 hour	4,250 potential biennials multiplied by # 1 hour	4,198 Biennials multiplied by 1 hour	Benchmark met.
	8,500 hours	4,250 hours	4,198 hours	

CE #5: Increase in Agency Rental Revenue (HCV)

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase). (Defined as Total HAP Expense)	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$2,243,429	\$2,243,429	\$2,707,190	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark

				(no change expected) has been set.
SS #1: Increase in Household Income(HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$6,735	\$12,140	\$6,977.26	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #3: Increase in Positive Outcomes in Employment Status (HCV)				
<i>Report the Baseline, Benchmark and Outcome data for each type of employment status for those head(s) of households affected by the self-sufficiency activity.</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
(6) Other (Heads with any Earned Income)	Number of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected number of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity.	Actual number of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity.	Whether the outcome meets or exceeds the benchmark.
	4,250 * .51 2,168	4,250 * .51 2,168	2,660	Activity is not designed to impact

				metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
(6) Other (Heads with any Earned Income)	Percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Actual percentage of total work-able households in (6) Other (defined as head(s) of households with earned income) after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
	51%	51%	1,662 out of 2,660 non-elderly/non-disabled 62%	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
<i>SS #4: Households Removed from Temporary Assistance for Needy Families (TANF) (HCV)</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number)	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	(#Biennials multiplied by percent receiving	(#Biennials multiplied by percent receiving	214	Activity is not designed to impact metric; metric is

	TANF) 4,250 * 2% 84	TANF) 4,250 * 2% 84		included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
SS #8: Households Transitioned to Self Sufficiency (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households transitioned to self-sufficiency (increase). The PHA may create one or more definitions for "self-sufficiency" to use for this metric. Each time the PHA uses this metric, the "Outcome" number should also be provided in Section (II) Operating Information in the space provided.	Households transitioned to self-sufficiency (Number of households paying full contract rent (no subsidy) for at least 6 months) prior to implementation of the activity (number). This number may be zero.	Expected households transitioned to self-sufficiency (Number of households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).	Actual households transitioned to self-sufficiency (Number of households paying full contract rent (no subsidy) for at least 6 months) after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	0	10	9	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

FY2014-5 – TRIENNIAL REEXAMINATIONS (HCV)

Statutory Objective: Reduce cost and increase cost effectiveness

1. Approved/Implemented: FY2014/FY2014 Q3

2. Description: Prior to this activity, HCV Elderly/Disabled households on a 100% fixed income completed biennial reexamination of their household 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. This activity allows SAHA to conduct triennial reexaminations for elderly/disabled HCV participant households on a 100% fixed income.

This activity was implemented in January 2014 for households with a reexamination date in May 2014. Every household will have the option of interim reexaminations at any time if there is a change in household composition, reduction in income or an increase in medical expenses.

2i. Hardships: There has been no hardship requests associated with this activity.

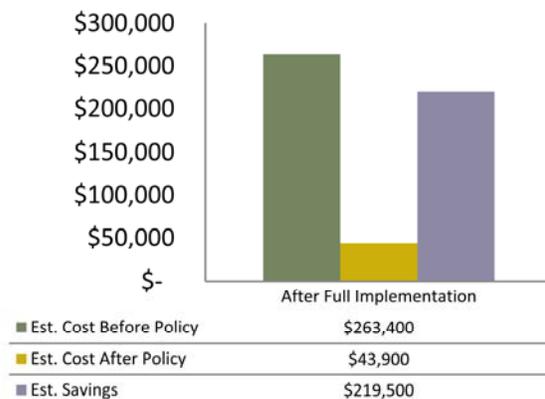
3. Challenges/Potential New Strategies: None.

4. Benchmark/Metric Changes: While the metrics for this activity have not substantially changed, the benchmark calculations have been updated from \$15.10 to \$21.95 to include both salary and benefits with the FY2015 average salary and benefits.

5. Data Collection: HCV collects data on the total number of triennials processed in the Elite housing database. Annual time studies are completed to estimate the average time spent on processing.

BY COMPLETING TRIENNIAL REEXAMINATIONS ON ELDERLY/DISABLED VOUCHER HOUSEHOLDS, THE AGENCY IS POSITIONED TO SAVE AN ESTIMATED \$219,500 PER YEAR³

Estimated Annual Impact of FY2014-5 (After Full Implementation)



³Cost before the policy includes conducting 1 hour reexams for all 12,000 households at the current salary rate of \$21.95 per hour. Cost after the policy includes conducting 1 hour reexams for one-third of the elderly/disabled households. Elderly/disabled households make

HUD STANDARD METRICS

CE #1: Agency Cost Savings (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark
	Baseline average HAS salary ((\$15.10) (\$21.95) multiplied by 12,000 reexams	Next year's average HAS salary ((\$15.10) (\$21.95) multiplied by 8,000 reexams	This year's average HAS salary (\$21.95) multiplied by number of reexams	Not available until the activity has been fully implemented on all eligible households.
	\$181,200/yr \$263,400/yr	\$120,800 \$175,600/yr	\$21.95 * 3,296 Triennials \$72,347.20	
CE #2: Staff Time Savings (HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark
	# triennials multiplied by 1 hour	# triennials multiplied by 1 hour	# triennials multiplied by 1 hour	Not available until the activity has been fully implemented on all eligible households.
	12,000 per year	8,000	3,296 Triennials multiplied by 1 hours	
CE #5: Increase in Agency Rental Revenue(HCV)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase). (Defined as	Rental revenue prior to implementation of the activity (in	Expected rental revenue after implementation of the activity (in	Actual rental revenue after implementation of the activity (in	Whether the outcome meets or exceeds the benchmark.

Total HAP Expense)	dollars).	dollars).	dollars).	
	\$304,222	\$304,222	\$1,543,486	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

FY2014-6 – Rent Simplification (HCV)**1. Approved/Planned Implementation:** FY2014/ July 2015

2. Implementation Discussion: Currently, rent calculation is based on 30% of the participant's adjusted monthly income. This activity lowers the percentage used to calculate rent to 27.5% of monthly gross income for all MTW HCV participants and new admissions, and eliminates deductions (i.e., medical and child care) with minimal impact to the participants' rent portion. MTW participants who experience a rent increase of \$26 or more due to the rent simplification calculation will have the household's Total Tenant Payment (TTP) calculated in accordance with 24 CFR 5.628 (i.e., non-MTW TTP calculation). Participants who are granted a hardship exemption will remain exempt until their rent portion falls below the \$26 threshold. Hardship exemptions under this provision will be verified at each annual and interim reexamination. The implementation of this activity was intentionally delayed while SAHA engaged with HUD and MDRC on a national rent reform study. The agency will be implementing this activity in July 2015.

SAHA is 1 of 4 MTW agencies participating in a rent reform study. Households who are not part of the study (approximately 2,000) will follow FY2014-6 rent policies.

FY2015-1 – MDRC / HUD Rent Reform Study

Statutory Objective: Increase Housing Choices, Reduce cost and increase cost effectiveness, and Promote Self-Sufficiency

1. Approved/Implemented: FY2015/ Started selecting participants in March 2015 for June 2015 Recertifications.

2. Description:

FY2015 Update

During FY2015, SAHA has worked with HUD and MDRC to lay the groundwork for the implementation of this activity. SAHA has updated the Administrative Plan, updated procedures, trained and prepared the proper staffing of housing specialists and has made modifications to its housing software in order to implement these activities. SAHA has also started to enroll households into the Study and Control Groups.

SAHA anticipates that enrollment will continue for several months into FY2016, through January 2016. This means that many of the metrics will need to be evaluated in the context of a half-year of full implementation.

General Description

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

The goals of this alternative rent policy are to:

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

A computer generated program will randomly select the participants for the Study from the pool of eligible vouchers. The Study Group vouchers will be managed using the proposed policies. The Control Group vouchers will be managed using the existing policies. Eligible participants in both the Study and

Control Groups will include only those with vouchers that are administered under the Moving To Work (MTW) Program and not currently utilizing a biennial certification. Non-MTW Vouchers (i.e., Veterans Affairs Supportive Housing, Moderate Rehabilitation, and Shelter Plus Care), Enhanced Vouchers, and HUD Project Based Vouchers are excluded from the Study. Additionally, the Study is focused on workable populations and will not include elderly households; disabled households, and households headed by people older than 56 years of age (who will become seniors during the course of the long-term study). Households currently participating in Family Self-sufficiency (FSS) and Homeownership programs will not be included in the Study. Households that contain a mix of members with an immigration status that is eligible for housing assistance and immigration status that is non-eligible for housing assistance would not be included in the Study.

Description of Rent Reform Components

The Study is designed to test an alternative strategy to standard HUD operating rules for the HCV program. The proposed alternative rent policies will include the following six key features:

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

Description of the Rent Reform Activity

1. Simplified Income Determination and Rent Calculation

Under the current HUD regulations, the Total Tenant Payment (TTP) is a calculation derived from the voucher household's 30% adjusted monthly income (gross income less HUD prescribed deductions and allowances). SAHA follows a process of interviewing the household to identify

all sources of income and assets, then proceeds to verify the information and perform the final calculation. The process is complex and cumbersome, which increases the risk of errors. According to HUD's Occupancy Handbook, Chapter 5 "Determining Income and Calculating Rent," the most frequent errors found across PHA's are: Voucher holders failing to fully disclose income information; errors in identifying required income exclusions; and incorrect calculations of deductions often resulting from failure to obtain third-party verification. The complexity makes the HCV program less transparent and understandable by the public, landlords, and voucher holders.

2. Elimination of Deductions

SAHA proposes a new method of calculation, which eliminates the calculation of deductions and allowances in the determination of annual income.

a. Percent Annual Gross Income.

The Total Tenant Payment (TTP) rent calculation will be determined by establishing gross annual income and then determining the greater of 28% of the gross monthly income or the minimum rent of \$100.

b. Elimination of Income from Assets valued less than \$25,000

SAHA will eliminate the verification and calculation of income earned from household assets valued less than \$25,000. Households would not be required to document assets worth less than that amount. This will reduce administrative costs and simplify the program for greater transparency and program compliance.

c. Review of Retrospective Income.

To establish annual gross income for the three year certification period, SAHA will review the total household income without deductions for the twelve-month period prior to recertification, i.e., the "Retrospective Gross Income." A household's annual gross income will depend on its *Retrospective Gross Income* during a 12-month "look back" period.

At the certification, if a household's current/anticipated income is less than its retrospective gross income by more than 10%, a "temporary" TTP based on current income alone will be set for a six-month grace period. After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined average retrospective gross income. No interim recertification interview would be required to reset this TTP.

d. Capping the Initial Maximum Rent Burden

HUD places a rent maximum for households moving into a new unit under the Housing Choice Voucher subsidy. This maximum rent burden is determined to be 40% of the household's adjusted annual income. However, under the Rent Reform Study the PHA will no longer be adjusting household income using deductions and allowances. The household must not pay more than 40 percent of gross current monthly income for the family share when the family first receives voucher assistance in a particular unit. (This maximum rent burden requirement is not applicable at reexamination if the family stays in place).

3. Triennial Certifications

SAHA currently performs re-certification of HCV households on an annual basis. The annual certification will review program eligibility, household composition, income and other household circumstances. Additional re-examinations ("interim certifications") may be required for changes in the household situation such as: composition, income, and change in unit.

SAHA proposes performing re-certification of the Study Group every third year (triennial). The triennial certification will review program eligibility, household composition, current income and income over the past twelve months ("retrospective income"), unit information and shall set the Total Tenant Portion (TTP) and the household share of the rent. The TTP for the Study Group will remain in effect during the three year certification period, with some exceptions related to decreases in income and changes in household.

Under the alternative rent policy, a household's annual gross income will be determined using its reported (and verified) *retrospective gross income* during a 12-month "look-back" period. (In this calculation, gross income will exclude any prior income from sources that have expired for the household during that period, such as TANF or Unemployment Insurance benefits, since the household can no longer count on them. It will include imputed welfare income – i.e., any sanctioned portion of a household's TANF grant). SAHA will create a local form to supplement the HUD form 9886 to provide tenant consent for SAHA to collect information relevant to the triennial recertification period.

If the household has an increase in income between certifications, the household's TTP will not be re-determined and increased to reflect the higher income. However, if the household has a decrease in income, the household may request and SAHA may provide an interim re-certification or other remedies under the hardship process (see Section V). The interim re-certification will be conducted when a household has a reduction of income of more than 10% from the retrospective gross income.

- a. SAHA interim certification will re-calculate the household TTP based on a new retrospective gross income review to determine the greater of 28% of the retrospective gross income or the minimum rent of \$100. This retrospective gross income will establish the TTP that will remain in effect until the sooner of the next triennial certification or a tenant requested interim certification. The tenant may only request one interim certification per year. The year period during which only one interim is permitted begins on the effective date of the triennial recertification and ends 12 months later.
- b. At the triennial certification at the beginning of the three-year period (and at subsequent triennials) if a household's current/anticipated gross income is less than its retrospective gross income by more than 10%, the current income alone will be used to create a "temporary" TTP for a six-month grace period. After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined retrospective gross income. No interim recertification interview would be required to reset this TTP.
- c. At the initial triennial certification only, if a household's childcare expense exceeds \$200 per month, the gross income will be reduced by a deduction of reasonable childcare cost above the \$200 per month, to create a "temporary" TTP for a six-month grace period. SAHA defines reasonable childcare costs as less than \$3,000 per year for one child and \$6,000 per year for two children. After that grace period, the TTP will automatically be switched to the TTP amount based on the previously determined retrospective gross income. No interim recertification interview would be required to reset this TTP.
- d. The Study Group will be allowed one request per year for an interim certification to reset their TTP. The year period during which only one interim is permitted begins on the effective date of the triennial recertification and ends 12 months later. The TTP will only be reset if a household's new retrospective monthly income (at the time of the request) is more than 10% lower than its most recent prior retrospective gross monthly income. If the limit on interim certification presents a hardship, the household will need to apply for a Hardship Exemption (See Section V below).

4. Streamline Interim Certifications

SAHA will institute a streamlined interim certification process for the Study Group to report change of circumstance that does not require adjustment in subsidy. For these events, SAHA will not request income information. These events include:

- a. Changes to household composition. The Study Group must report both additions and removal of members to the household to SAHA to determine program eligibility and other HUD required reporting (e.g. deceased tenant reporting). However, unless the addition of an adult member changes the voucher bedroom size appropriate for the household composition to prevent overcrowding or over-housing, SAHA will not request income information for the new household member until the next scheduled triennial certification.

If the loss of a household member results in a reduction of more than 10% of the most recent retrospective gross income, the household will be allowed to reset their TTP.

In the event that the new or removed member requires a change to the voucher bedroom size, SAHA will review the retrospective gross income of the newly added or removed household members, apply a new utility allowance, and will reset the household TTP. A reduction in subsidy for new voucher bedroom size will be implemented when the current lease ends and new lease begins.

Changes to household composition will not be counted towards the limit of one requested interim certification per year.

- b. Change of unit. Households seeking to move to a new unit will submit a request for move pursuant to current procedures. For households that move to more expensive units during the three-year period, SAHA will absorb the higher contract rent costs up to the lesser of the gross rent or the payment standard, which is consistent with traditional rent rules. However, unless the request for move is due to a change in household composition, SAHA will not request income information or reset the household TTP until the sooner of the next scheduled triennial certification or tenant requested interim certification to reset TTP. SAHA will apply new utility allowance schedule, if any, to the household at the new lease effective date.
- c. Changes in Utility Allowances. When utility schedules are updated to reflect rate changes, utility allowances, and utility allowance payments (UAPs) will be adjusted only when HAP subsidies or TTPs are recalculated for other reasons. More specifically, updated utility schedules will be applied when households:
 - i. Change their contract rent,
 - ii. Recertify and the TTP is recalculated during interim or triennial,
 - iii. Move to new units, or
 - iv. Change their household composition requiring a change in voucher size.

5. Minimum Rent to Owner

Currently, HUD does not require minimum rents to be paid by the voucher holder to the landlord. SAHA is proposing that Study Group members will be required to make a minimum payment of at least \$100 direct to the HCV landlord in addition to SAHA's portion of rent (Housing Assistance Payment "HAP"). The total amount of rent will equal the contract rent established in the lease. This policy mirrors the market system of tenants paying owners directly and creates a closer relationship and sense of responsibility for both the leaseholder HCV household and the property owner.

The amount of rent to owner the Study Group will pay is equal to their TTP less the Utility Allowance plus any amount over the payment standard for which the tenant may be responsible to pay. The Study Group rent to owner will not be less than the minimum rent. In the event that the Study Group household TTP less the Utility Allowance is less than the minimum rent, the household will pay the Owner the minimum rent and SAHA will reimburse the household the balance of the Utility Allowance. However, if the minimum rent to owner exceeds 40% of the household current/anticipated gross income, the household may request a Hardship Exemption as detailed in Section V below.

6. Simplified Utility Allowance Schedule

Currently, SAHA annually reviews and periodically re-establishes a Utility Allowance Schedule which represents the reasonable expectation of costs for utilities as part of the tenant's lease. The utility allowance is based on utility surveys and analysis of the type of structure, bedroom size, appliances provided by tenant, and type of appliances (gas/electric). The simplified schedule is based on the analysis of data collected from SAHA's existing HCV portfolio including the most common structure and utility types. This new utility allowance schedule will be implemented upon the triennial certification or change of unit.

SAHA proposes a simplified schedule to reduce administrative costs and reduce errors associated with the traditional method of applying the Utility Allowance Schedule. The simplified utility allowance schedule is also anticipated to benefit property owners who will have a more accurate understanding of the total gross rent to be applied to their properties and to the Study Group members who will be able to use this new schedule to clarify gross rent in their selection of housing units.

This schedule will be applied to the lesser of: the actual size of the unit or the size of the voucher rather than the larger of the actual unit size or the voucher size. SAHA will continue to use current market consumption data to determine when adjustments to the simplified schedule are needed (upon change of more than 10% in rates).

Proposed Flat Utility Allowance

Bedroom Size	Flat Rate
0	\$ 75
1	\$ 94
2	\$124
3	\$174
4	\$214
5	\$277
6	\$290
7	\$333

2i. Hardships: There have been no hardships during this fiscal year.

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

4. Benchmark/Metric Revisions: Staff wages will be updated in FY2016 when the Agency begins reporting outcomes.

5. Data Collection: SAHA is currently working with a software vendor to develop standard reports that will allow the Agency to report on the metrics listed below. Data will be collected from the Elite housing database and surveys conducted by MDRC.

HUD STANDARD METRICS

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars.	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Cost per Annual Certification	<p><u>YEAR 1: \$12,657.50</u> <u>YEAR 2: \$12,657.50</u> <u>YEAR 3: \$12,657.50</u> <u>OVERALL: \$37,972.50</u></p> <ul style="list-style-type: none"> • Baseline Time to calculate annual certification: 830 hours • <i>Times</i> average staff wage: \$15.25 \$21.95 	<p><u>YEAR 1: \$5,947.50</u> <u>YEAR 2: \$0</u> <u>YEAR 3: \$0</u> <u>OVERALL: \$5,947.50</u> Savings: \$32,025.00</p> <ul style="list-style-type: none"> • Benchmark Time to calculate annual recertification: 390 hours • <i>Times</i> average staff wage: \$15.25 	No Results	To be reported on in FY2016 Report
Cost per Interim Certification	<p><u>YEAR 1: \$6,328.75</u> <u>YEAR 2: \$6,328.75</u> <u>YEAR 3: \$6,328.75</u> <u>OVERALL: \$18,986.25</u></p> <ul style="list-style-type: none"> • Baseline Time to calculate interim certification: 415 hours • <i>Times</i> average staff wage: \$15.25 	<p><u>YEAR 1: \$2,973.75</u> <u>YEAR 2: \$2,973.75</u> <u>YEAR 3: \$2,973.75</u> <u>OVERALL: \$8,921.25</u> Savings: \$10,065.00</p> <ul style="list-style-type: none"> • Benchmark Time to calculate interim recertification: 195 hours • <i>Times</i> average staff wage: \$15.25 	No Results	To be reported on in FY2016 Report

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars.	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Cost of Rent Calculation	<p><u>YEAR 1: \$5,032.50</u> <u>YEAR 2: \$5,032.50</u> <u>YEAR 3: \$5,032.50</u> <u>OVERALL: \$15,097.50</u></p> <ul style="list-style-type: none"> Baseline Time to calculate rent: 330 hours Times average staff wage: \$15.25 	<p><u>YEAR 1:\$1,982.50</u> <u>YEAR 2:\$0</u> <u>YEAR 3: \$0</u> <u>OVERALL:\$1,982.50</u> Savings: \$13,115</p> <ul style="list-style-type: none"> Baseline Time to calculate rent: 130 hours Times average staff wage: \$15.25 	No Results	To be reported on in FY2016 Report
Cost to Determine Income from Assets	<p><u>YEAR 1:\$19.29</u> <u>YEAR 2:\$19.29</u> <u>YEAR 3:\$19.29</u> <u>OVERALL: : \$57.87</u></p> <ul style="list-style-type: none"> Baseline Time to determine Income from Assets: 1.27 hours Times average staff wage: \$15.25 	<p><u>YEAR 1:\$2.52</u> <u>YEAR 2:\$0</u> <u>YEAR 3:: \$0</u> <u>OVERALL:\$2.52</u> Savings: \$55.36</p> <ul style="list-style-type: none"> Benchmark Time to determine Income from Assets: 0.17 hours Times average staff wage: \$15.25 	No Results	To be reported on in FY2016 Report

CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars.	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Cost to Determine utility allowance	<p><u>YEAR 1:\$2,952.50</u> <u>YEAR 2:\$2,952.50</u> <u>YEAR 3:\$2,952.50</u> <u>OVERALL: : \$7,777.50</u></p> <ul style="list-style-type: none"> • Baseline Time to determine Utility Allowance: 170 hours • <i>Times</i> average staff wage: \$15.25 	<p><u>YEAR 1:\$1,372.50</u> <u>YEAR 2:\$0</u> <u>YEAR 3:\$0</u> <u>OVERALL:\$1,372.50</u> Savings:\$6,405</p> <ul style="list-style-type: none"> • Benchmark Time to determine Utility Allowance: 90 hours • <i>Times</i> average staff wage: \$15.25 	No Results	To be reported on in FY2016 Report

CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.

<p>Time to Complete Annual Certification</p>	<p><u>YEAR 1: 830 hours</u> <u>YEAR 2: 830</u> <u>YEAR 3: 830</u> <u>OVERALL:2,490 hours</u></p> <ul style="list-style-type: none"> • Time to Complete Annual Certification (not including 0.66 hours of preparation): 0.83 hours • <i>times</i> the number of study participants: 1,000 	<p><u>YEAR 1:390 hours</u> <u>YEAR 2: 0</u> <u>YEAR 3:0</u> <u>OVERALL:390 hours</u> Savings: 2,100 hours</p> <ul style="list-style-type: none"> • Time to Complete Annual Certification (not including 0.66 hours of preparation): 0.39 hours • <i>times</i> the number of study participants: 1,000 	<p>No Results</p>	<p>To be reported on in FY2016 Report</p>
<p>Time To Determine Tenant Rent</p>	<p><u>YEAR 1: 330</u> <u>YEAR 2: 330</u> <u>YEAR 3: 330</u> <u>OVERALL: 990</u></p> <ul style="list-style-type: none"> • Time to Determine Tenant Rent: 0.33 hours • <i>times</i> the number of study participants: 1,000 	<p><u>YEAR 1: 130</u> <u>YEAR 2: 0</u> <u>YEAR 3: 0</u> <u>OVERALL: 130</u> Savings: 860</p> <ul style="list-style-type: none"> • Time to Determine Tenant Rent: 0.13 hours • <i>times</i> the number of study participants: 1,000 	<p>No Results</p>	<p>To be reported on in FY2016 Report</p>

<p>Time to Determine Utility Allowance</p>	<p><u>YEAR 1:170 hours</u> <u>YEAR 2:170</u> <u>YEAR 3:170</u> <u>OVERALL: 510</u></p> <ul style="list-style-type: none"> • Time to Determine Utility Allowance: 0.17 hours • <i>times</i> the number of study participants: 1,000 	<p><u>YEAR 1:90 hours</u> <u>YEAR 2:0</u> <u>YEAR 3:0</u> <u>OVERALL:90</u> Savings:420</p> <ul style="list-style-type: none"> • Time to Determine Utility Allowance: 0.09 hours • <i>times</i> the number of study participants: 1,000 	<p>No Results</p>	<p>To be reported on in FY2016 Report</p>
<p>Time to Determine Income from Assets</p>	<p><u>YEAR 1:: 1.27 hours</u> <u>YEAR 2: 1.27</u> <u>YEAR 3:: 1.27</u> <u>OVERALL: 3.8 hours</u></p> <ul style="list-style-type: none"> • Time to Determine Income from Assets: 0.33 hours • <i>times</i> the number of study participants: 1,000 • <i>times</i> the estimated proportion of affected participants: 0.0038 (0.38%) 	<p><u>YEAR 1: 0.17 hours</u> <u>YEAR 2: 0</u> <u>YEAR 3: 0</u> <u>OVERALL:0.17 hours</u> Savings: 3.63 hours</p> <ul style="list-style-type: none"> • Time to Determine Income from Assets: 0.33 hours • <i>times</i> the number of study participants: 1,000 • <i>times</i> the estimated proportion of affected participants: 0.0005 (0.05%) 	<p>No Results</p>	<p>To be reported on in FY2016 Report</p>

CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
Average Error Rate in Determining TTP	18%	15%	No Results	To be reported on in FY2016 Report
Average Error Rate in Determining Utility Allowance	2%	2%	No Results	To be reported on in FY2016 Report

SS #1: Increase in Household Income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average earned income of households affected by this policy in dollars (increase).	Average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Expected average earned income of households affected by this policy prior to implementation of the activity (in dollars).	Actual average earned income of households affected by this policy prior to implementation (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average Earned Income of Study Group	TBD after random assignment	TBD after random assignment	No Results	To be reported on in FY2016 Report

SS #3: Increase in Positive Outcomes in Employment Status

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Report the following information separately for each category: (1) Employed Full-Time (2) Employed Part-Time (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed (6) Other	Head(s) of households in in the categories identified below prior to implementation of the activity (number). This number may be zero.	Expected head(s) of households in in the categories identified below after implementation of the activity (number).	Actual head(s) of households in in the categories identified below after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
	Percentage of total work-able households in the categories identified below prior to implementation of activity (percent). This number may be zero.	Expected percentage of total work-able households in the categories identified below after implementation of the activity (percent).	Actual percentage of total work-able households in the categories identified below after implementation of the activity (percent).	Whether the outcome meets or exceeds the benchmark.
Study Group Employment Status for (1) Employed Full-Time: (2) Employed Part-Time: (3) Enrolled in an Educational Program: (4) Enrolled in Job Training Program: (5) Unemployed: (6) Other:	TBD after random assignment (1) Employed FT: (2) Employed PT: (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed: (6) Other: NA	TBD after random assignment (1) Employed FT (2) Employed PT (3) Enrolled in an Educational Program (4) Enrolled in Job Training Program (5) Unemployed: Other: NA	No Results	To be reported on in FY2016 Report

SS #4: Households Removed from Temporary Assistance for Needy Families (TANF)				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving TANF assistance (decrease).	Households receiving TANF prior to implementation of the activity (number).	Expected number of households receiving TANF after implementation of the activity (number).	Actual households receiving TANF after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Study Group Households Receiving TANF Benefits	TBD after random assignment	TBD after random assignment	No Results	To be reported on in FY2016 Report

SS #5: Households Assisted by Services that Increase Self-sufficiency				
Self-sufficiency: A household in good standing transitions to self-sufficiency when their housing subsidy is reduced to \$0.				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households receiving services aimed to increase self-sufficiency (increase).	Households receiving self-sufficiency services prior to implementation of the activity (number).	Expected number of households receiving self-sufficiency services after implementation of the activity (number).	Actual number of households receiving self-sufficiency services after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Study Group Households Receiving Self-sufficiency Services	Baseline is equal to: TBD after random assignment	Benchmark is equal to: The same number of Households Receiving Self-sufficiency Services	No Results	Activity is not designed to impact metric; metric is included for MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.

SS #6: Reducing Per Unit Subsidy Costs for Participating Households

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average amount of Section 8 and/or 9 subsidy per household affected by this policy in dollars (decrease).	Average subsidy per household affected by this policy prior to implementation of the activity (in dollars).	Expected average subsidy per household affected by this policy after implementation of the activity (in dollars).	Actual average subsidy per household affected by this policy after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Average HCV Subsidy for Study Group	TBD after random assignment	TBD after random assignment	No Results	To be reported on in FY2016 Report

SS #7: Increase in Agency Rental Revenue

Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
PHA rental revenue in dollars (increase).	PHA rental revenue prior to implementation of the activity (in dollars).	Expected PHA rental revenue after implementation of the activity (in dollars).	Actual PHA rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total HCV Tenant Share for Study Group	TBD after random assignment	TBD after random assignment	No Results	To be reported on in FY2016 Report

HC #5: Increase in Resident Mobility				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	Households able to move to a better unit and/or neighborhood of opportunity prior to implementation of the activity (number). This number may be zero.	Expected households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Actual increase in households able to move to a better unit and/or neighborhood of opportunity after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
Number of households able to move to a better unit and/or neighborhood of opportunity as a result of the activity (increase).	0 The baseline for this activity is zero because the population selected for the rent reform activities has not been selected at this time.	0 The benchmark for this activity is zero, the same as the baseline, because the rent reform activities are not designed to move families into neighborhoods of opportunity as an intended outcome.	No Results	To be reported on in FY2016 Report

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

Statutory Objective: Increase Housing Choices

1. Approved/Implemented: FY2015/FY2015

2. Description: This activity is designed to meet the statutory objective of increasing housing choices for low-income families and was originally approved as part of the FY2014-2015 MTW Plan. This activity establishes a 4-to-1 elderly admissions preference at specific communities in order to increase housing choices for elderly households.

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

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

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

Housing advocates, however, suggested that the optimal proportion should be 80% elderly and 20% non-elderly residents. This MTW activity, FY2015-2, adopts that suggested 80/20 ratio ("4-to-1") both for its admissions preference as well as for its ultimate unit mix. In doing so, SAHA is applying the same admissions preference that is in effect at the Atlanta Housing Authority, and for the same purpose: to create and maintain a balanced population of elderly and non-elderly disabled residents at each community. In Atlanta's MTW Plans and Reports, the activity is referred to as the "4-to-1 Elderly Admissions Preference".

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

The first communities at which this policy is applied are Fair Avenue and WC White. The following section describes how the activity works at each community.

I. Fair Avenue

The total number of units at Fair Avenue is 216, making 173 the 80% target for elderly households. Prior to implementation, Fair Avenue was home to 110 elderly (62 and over) households. So Fair Avenue needs to add 63 elderly households to meet the 80% target. The turnover rate for Fair Avenue in FY2014 was 19.9% (3.5 units per month), or 43 units over the course of the year.

Assuming turnover rate would remain the same for FY2015, SAHA expected those 43 available units to be offered to 35 elderly households and 8 non-elderly disabled households. Specifically, the first four available units would be offered to elderly households, and the fifth available unit would then be offered to a non-elderly disabled household. The sixth through ninth units would be offered to elderly households, and the tenth to a non-elderly disabled household. That sequence, repeated through the year in 8 full cycles and 1 partial cycle, is represented in the following table, where “E” represents Elderly Household and “NE” represents Non-elderly Disabled Household.

Fair Avenue: Admissions cycle and estimated time frame based on turnover rate of 3.5 units per month	E	E	E	E	NE
1 (Jul – Aug)	1	2	3	4	5
2 (Aug-Sep)	6	7	8	9	10
3 (Sep-Oct)	11	12	13	14	15
4 (Nov-Dec)	16	17	18	19	20
5 (Dec-Jan)	21	22	23	24	25
6 (Jan-Feb)	26	27	28	29	30
7 (Mar-Apr)	31	32	33	34	35
8 (Apr-May)	36	37	38	39	40
9 (May-Jun)	41	42	43		
Total admissions at the end of the plan year	35				8

Assuming that turnover is proportionally distributed between elderly and non-elderly units, SAHA expected the number of elderly households at Fair Avenue to increase to 123 by the end of FY2015.

Household Type	Current number of units	Number made available due to turnover (subtract)	Number offered based on admissions preference (add)	Net change	Total number at end of FY2015
Non-Elderly Disabled	106	-21	+8	-13	93
Elderly	110	-22	+35	+13	123

At the net rate of 13 units per year, Fair Avenue is expected to reach the goal of adding 63 elderly households in 4 to 5 years.

The variable that SAHA knows the least about today is how turnover will be distributed between elderly and non-elderly households. This calculation assumes that turnover is proportionally distributed between the household types. As the year progresses and actual data comes in, this assumption can be corrected with a better projection.

WC White

The total number of units at WC White is 75, making 60 the 80% target for elderly households. Prior to implementation, WC White was home to 38 elderly (62 and over) households. So the community needs to add 22 elderly households to meet the 80% target. The turnover rate for WC White in FY2014 was 25.33% (1.6 units per month), or 19 units over the course of the year.

Assuming turnover remained the same for FY2015, SAHA expected those 19 available units to be offered to 16 elderly households and 3 non-elderly disabled households. Specifically, the first four available units would be offered to elderly households, and the fifth available unit would then be offered to a non-elderly disabled household. The sixth through ninth units would be offered to elderly households, and the tenth to a non-elderly disabled household. That sequence, repeated through the year in 3 full cycles and 1 partial cycle, is represented in the following table, where “E” represents Elderly Household and “NE” represents Non-elderly Disabled Household.

WC White: Admissions cycle and estimated time frame based on turnover rate of 1.6 units per month	E	E	E	E	NE
1 (Jul – Sep)	1	2	3	4	5
2 (Oct-Dec)	6	7	8	9	10
3 (Jan-Apr)	11	12	13	14	15
4 (Apr-Jun)	16	17	18	19	
Total admissions at the end of the plan year	16				3

Assuming that turnover is proportionally distributed between elderly and non-elderly units, SAHA expected the number of elderly households at WC White to increase to 44 by the end of FY2015.

Household Type	Current number of units	Number made available due to turnover (subtract)	Number offered based on admissions preference (add)	Net change	Total number at end of FY2015
Non-Elderly Disabled	37	-9	+3	-6	31
Elderly	38	-10	+16	+6	44

At the net rate of 6 units per year, Fair Avenue will reach the goal of adding 22 elderly households in 3 to 4 years.

The variable that SAHA knows the least about today is how turnover will be distributed between elderly and non-elderly households. This calculation assumes that turnover is proportionally distributed between the household types. As the year progresses and actual data comes in, this assumption can be corrected with a better projection.

2i. Hardships: This activity is not a rent reform activity; therefore, this MTW reporting element is not required.

3. Challenges/Potential New Strategies: This activity did not begin implementation until November 1, 2014. The Agency's priority up to that time was increasing occupancy across the Public Housing portfolio. Since November, the Agency has actually seen a very low rate of elderly household applicants at all properties. As a result, staff have been challenged with trying to implement the activity while maintaining a high occupancy at Fair and WC White.

4. Benchmark/Metric Revisions: In the FY2015 plan, HC#5 Increase in Housing Mobility was listed as the HUD Standard metric in error. The metric is HC#1 Additional Units of Housing Made Available. The actual figures have not changed; rather, only the name of the metric.

5. Data Collection: SAHA tracks occupancy by household type using the Elite housing database.

HUD STANDARD METRICS

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
<p>Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.</p> <p>Units occupied by elderly family</p>	<p>Housing units of this type prior to implementation of the activity (number). This number may be zero.</p>	<p>Expected housing units of this type after implementation of the activity (number).</p>	<p>Actual housing units of this type after implementation of the activity (number).</p>	<p>Whether the outcome meets or exceeds the benchmark.</p>
<p>Total number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase).</p>	<p>148 units occupied by elderly family</p>	<p>186 units occupied by elderly family/ 38 additional units occupied by elderly family (186 minus 148)</p>	<p>171 units occupied by elderly family/ 23 additional units occupied by elderly family (171 minus 148)</p>	<p>Benchmark not met.</p>
<p>At Fair Avenue, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase).</p>	<p>110 units occupied by elderly family</p>	<p>136 units occupied by elderly family/ 26 additional units occupied by elderly family (136 minus 110)</p>	<p>131 units occupied by elderly family/ 21 additional units occupied by elderly family (131 minus 110)</p>	<p>Benchmark not met.</p>

At WC White, number of housing units made available for elderly households at or below 80% AMI as a result of the activity (increase).	38 units occupied by elderly family	50 units occupied by elderly family/ 12 additional units occupied by elderly family (50 minus 38)	40 units occupied by elderly family/ 2 additional units occupied by elderly family (40 minus 38)	Benchmark not met.
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SAHA METRICS

<i>Elderly Household Percentage</i>				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Percentage of units occupied by elderly households	Percentage of units occupied by elderly households prior to implementation of the activity	Expected percentage of units occupied by elderly households after implementation of the activity	Actual percentage of units occupied by elderly households after implementation of the activity	Whether the outcome meets or exceeds the benchmark.
Total	148 of 291 total units (51%)	186 of 291 total units (64%)	171 out of 291 total units (59%)	Benchmark not met.
Fair Avenue	110 of 216 total units (51%)	136 of 216 total units (63%)	131 out of 216 total units (61%)	Benchmark not met.
WC White	38 of 75 total units (51%)	50 of 75 total units (67%)	40 of 75 total units (53%)	Benchmark not met.

FY2015-3 – Modified Project Based Vouchers

Statutory Objective: Reduce cost and increase cost effectiveness and increase housing choices

1. Approved/Implemented: FY2015/FY2015

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

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

2i. Hardships: This activity is not a rent reform activity; therefore, this MTW reporting element is not required.

3. Challenges/Potential New Strategies: The project-based Section 8 housing program experienced specific leasing issues at the new Gardens at San Juan Square. As mentioned above in section II.B. Leasing Information, the issues were a result of differences in policies and processes between the housing authority and traditional housing programs and the third-party management and the multi-financing requirements. In addition to the challenges mentioned above for Public Housing, the clients in the voucher program experienced confusion as to the project-based nature of the voucher. Many clients tried to use the voucher at other locations. The voucher program was able to mitigate these issues by conducting joint appointments with the third-party management staff, identifying on the voucher with a sticker and note that the voucher could only be used at the Gardens at San Juan Square, and conducting larger pulls off of the waiting list to ensure there were enough eligible applicants.

In the FY2015 MTW Plan, metrics for Wheatley Courts and Victoria Commons Chavez Multifamily were included in this activity. Due to changing development timelines, the modified Project-Based Vouchers (PBVs) could not be committed. It is anticipated that those properties could be reconsidered for this activity for FY2017 or beyond.

4. Benchmark/Metric Revisions: Benchmarks for this activity were revised to reflect the change in development timelines for Wheatley Courts and Victoria Commons Chavez Multifamily.

5. Data Collection: SAHA continues to track this activity using Elite housing database.

HUD STANDARD METRICS

HC #1: Additional Units of Housing Made Available				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
<p>Number of new housing units made available for households at or below 80% AMI as a result of the activity (increase). If units reach a specific type of household, give that type in this box.</p> <p align="center">Project-Based Vouchers</p>	Housing units of this type prior to implementation of the activity (number). This number may be zero.	Expected housing units of this type after implementation of the activity (number).	Actual housing units of this type after implementation of the activity (number).	Whether the outcome meets or exceeds the benchmark.
# of additional units made affordable to households based on their actual ability to pay (at or below 80% AMI)	0	80 31	31	Benchmark met
San Juan III (units at or below 60% AMI)	0	31	31	Benchmark met
Wheatley Courts (units at or below 60% AMI)	0	10	NA	NA
Victoria Commons Chavez Multifamily	0	39	NA	NA
CE #1: Agency Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total cost of task in dollars (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
San Juan III	# of units * average per unit cost (PUC) * 12 months 31 * \$563.38 * 12 = \$209,577	\$0.00	\$0.00	Benchmark met

Wheatley Courts	10 * \$563.38 * 12 = \$67,606	\$0.00	NA	Benchmark not met
Victoria Commons	39 * \$563.38 * 12 = \$263,662	\$0.00	NA	Benchmark not met
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours).	Expected amount of total staff time dedicated to the task after implementation of the activity (in hours).	Actual amount of total staff time dedicated to the task after implementation of the activity (in hours).	Whether the outcome meets or exceeds the benchmark.
San Juan III	# of recertifications after 2 years (due to new biennial recertification schedule) * average staff time per recertification (in hours) 31 * 1.5 = 47 hours	0 hours	0 hours	Benchmark met
Wheatley Courts	10 * 1.5 = 15 hours	0 hours	NA	Benchmark not met
Victoria Commons	39 * 1.5 = 59 hours	0 hours	NA	Benchmark not met

SAHA METRICS

Median household income				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Median income of households living in local project based set-aside voucher units, by income bracket	<i>Metrics listed by community below.</i>			
80% AMI	80% AMI	75% AMI	NA	NA – There were no 80% AMI occupants at end of FY15
60% AMI	60% AMI	55% AMI	NA	NA – There were no 60% AMI occupants at end of FY15
50% AMI	50% AMI	45% AMI	NA	NA – There were no 50% AMI occupants at end of FY15
30% AMI	30% AMI	25% AMI	8% AMI	Benchmark met, household served by PBV are well under 25% AMI

FY2015-4 – Simplified Utility Allowance

Statutory Objective: Reduce cost and increase cost effectiveness

1. Approved/Implemented: FY2015/ January 2014 for vouchers issued and May 2014 reexaminations.

2. Description: Currently, SAHA annually reviews and periodically re-establishes a Utility Allowance Schedule which represents reasonable utility cost expectations as part of a tenant's lease. The Utility Allowance Schedule is based on utility surveys and analysis of the type of structure, bedroom size, appliances provided by tenant, and type of appliances (gas/electric).

This activity establishes a new, simplified schedule that is based on the analysis of data collected from SAHA's existing HCV portfolio including the most common structure and utility types. The simplified schedule reduces administrative costs associated with the traditional method of applying a Utility Allowance Schedule. Specifically, the activity will allow the HCV department to be more cost effective by reducing staff time spent on calculating multiple utility schedules for 6 different structure types plus various utility types such as gas, electric or propane.

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

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

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

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

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

This fiscal year, SAHA has 1,094 participants under the flat Utility Allowance (UA) schedule. The following participants were removed:

- All special programs participants
- All participants whose UA does not equal flat UA amounts
- All participants who UA equals flat UA amounts but were processed prior to the January 1, 2015 implementation
- All participants who UA equals flat UA amount but move in date was prior to effective date

2i. Hardships: None.

3. Challenges/Potential New Strategies: Implementation was delayed until January 2015 due to required software updates.

4. Benchmark/Metric Revisions: The average salary used in the cost savings calculated was updated from \$15.25 to \$21.95 to reflect salary and benefits.

5. Data Collection: SAHA continues to track this activity using Elite housing database and an internal QC database.

HUD STANDARD METRICS

CE #1: Cost Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
Total time to complete the task in staff hours (decrease).	0.17 hours multiplied by 11,727 households = 1,850 hours multiplied by average staff cost \$15.25 -\$21.95	0.09 hours multiplied by 10,881 households = 979 hours multiplied by average staff cost \$15.25 \$21.95	0.09 hours multiplied by 1,094 households = 98 hours multiplied by average staff cost \$21.95	Benchmark not met due to delayed implementation. Agency did save \$1,921.06 on the 1,094 households this fiscal year.
	\$28,212.50 \$40,607.50	\$14,929.75 \$21,489.05	\$2,161.20	
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Total time to complete the task in staff hours (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity	Actual cost of task after implementation of the activity (in	Whether the outcome meets or exceeds the

		(in dollars).	dollars).	benchmark.
	Total amount of staff time dedicated to the task prior to implementation of the activity (in hours): 0.17 hours times 11,727 households = 1,850 hours	0.09 hours times 10,881 households = 979 hours	0.09 hours times 1,094 households = 98 hours	Benchmark not met due to delayed implementation. Agency did save 88 hours on the 1,094 households this fiscal year.
	1,850 hours	979 hours	98 hours	
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Whether the outcome meets or exceeds the benchmark.
	Utility Allowance Error Rate = 2%	Utility Allowance Error Rate = 2%	1%	Benchmark met.
CE #5: Increase in Agency Rental Revenue				
Unit of Measurement	Baseline	Benchmark	Outcome	Benchmark Achieved?
Rental revenue in dollars (increase).	Rental revenue prior to implementation of the activity (in dollars).	Expected rental revenue after implementation of the activity (in dollars).	Actual rental revenue after implementation of the activity (in dollars).	Whether the outcome meets or exceeds the benchmark.
	\$599,829	\$599,829	\$599,829	Activity is not designed to impact metric; metric is included for

				MTW standard metric reporting requirements only. Neutral benchmark (no change expected) has been set.
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NOT YET IMPLEMENTED ACTIVITIES

B. ACTIVITIES ON HOLD

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

1. Approved/Planned Implementation: FY2013/TBD pending HUD tests

2. Implementation Discussion: 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). This activity is on hold, pending results of HUD tests at other PHAs. No actions were taken to implement this activity in FY2015.

C. CLOSED OUT ACTIVITIES

CLOSED OUT IN FY2015

FY2014-1 – STREAMLINE REEXAMINATION REQUIREMENTS AND METHODS (HCV)

1. Final Outcomes/Lessons Learned: This activity was designed to reduce cost and increase cost effectiveness by allowing the Agency to use participant-provided documents to verify income instead of third-party verification from employers. The Enterprise Income Verification (EIV) report was and is still being used as its use is mandatory. In addition to streamlining methods of document verification, SAHA wanted to reduce the number of applicants and participants resubmitting documents for approved extension of voucher, and/or reasonable accommodations. The activity provided flexibility in the design and administration of housing assistance to increase operational efficiency and achieve greater cost effectiveness in federal expenditures. The activity is proposed to be closed out due to PIH Notice 2010 - 19 (HA) which gives housing authorities authorization without the need for an MTW waiver.

2. Description of any statutory exceptions outside current MTW flexibilities that might have provided additional benefit for this activity: None.

3. Summary Table:

HUD STANDARD METRICS

CE #1: Cost Savings				
Unit of Measurement	Baseline	Benchmark	FY2014	FY2015
Total cost to complete the task in staff hours (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).
	Avg staff time (.25 hours) * avg staff cost per hour (\$15.25)= \$3.81 per reexamination	Benchmark time (.17 hours) * avg staff cost per hour (\$15.25 = \$2.59 per certification	Actual Avg staff time (.17 hours) * avg staff cost per hour (\$15.25) = \$2.59 per certification	Actual Avg staff time (.17 hours) * avg staff cost per hour (\$21.95) = \$3.73 per certification
	12,133 * \$3.81 = \$46,266.73	12,133 * 2.59 = \$31,424.47	12,133 * 2.59 = \$31,424.47	9,478 * 3.73= \$35,352.94
CE #2: Staff Time Savings				
Unit of Measurement	Baseline	Benchmark	FY2014	FY2015

Total time to complete the task in staff hours (decrease).	Cost of task prior to implementation of the activity (in dollars).	Expected cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).	Actual cost of task after implementation of the activity (in dollars).
	Avg staff time (.25 hours)	Benchmark time (.17 hours)	Actual Avg staff time (.17 hours)	Actual Avg staff time (.25 hours)
	.25 hours * 12,133 = 3,033	.17 hours * 12,133 = 2,063	.17 hours * 12,133 = 2,063	.17 hours * 9,478 = 1,611.26
CE #3: Decrease in Error Rate of Task Execution				
Unit of Measurement	Baseline	Benchmark	FY2014	FY2015
Average error rate in completing a task as a percentage (decrease).	Average error rate of task prior to implementation of the activity (percentage).	Expected average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).	Actual average error rate of task after implementation of the activity (percentage).
	5%	4%	5%	11%

SAHA METRICS

Files Completed in a Timely Manner				
Unit of Measurement	Baseline	Benchmark	FY2014	FY2015
Percentage of files completed within 30-45 days	# of files completed within 30-45 days divided by total # files	# of files completed within 30-45 days divided by total # files	Annuals: 2,327/6,678 Interims: 4,635/5,455	Annuals: 1,265/3,921 Interims: 3,940/5,557
	% of files completed within 30-45 days: Annuals: 54.7% Interims: 76.7%	% of files completed within 30-45 days: Annuals: 64.7% Interims: 86.7%	% of files completed within 30-45 days: Annuals: 35% Interims: 85.0%	% of files completed within 30-45 days: Annuals: 32% Interims: 71%

3. Additional explanation about outcomes in summary table: None.

CLOSED OUT IN PRIOR YEARS

FY2011-1- Block grant funding with Full Flexibility

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

FY2011-1a- Promote Education through Partnerships

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

FY2011-1b- Pilot Child Care Program

Closed out in FY2013 Report.

FY2011-1c- Holistic Case Management

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

FY2011-1d- Resident Ambassador Program

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

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

Closed out in FY2013 Report.

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

Closed out in FY2013 and replaced with FY2014-4.

FY2011-4- Streamline methods of verification for PH and HCV

Closed out in FY2013 and replaced with FY2014-1.

FY2011-5- Requirements for acceptable documents for PH and HCV

Closed out in FY2013 and replaced with FY2014-1.

FY2012-10- Biennial Reexamination for Elderly/Disabled Participants on Fixed Income (HCV)

Closed out in FY2013 and replaced with FY2014-4.

FY2012-11- Local Project Based Voucher Program for Former Public Housing Residents

Closed out in FY2013 before implementation due to discussions with HUD regarding the Rental Assistance Demonstration Program.

FY2011-6 – Commitment of Project-Based Vouchers (PBV) to SAHA-owned or controlled units with expiring subsidies (HCV)

Closed out in FY2014 and replaced with FY2015-3 Modified Project-Based Vouchers.

FY2011-7 – Remove limitation of commitment on PBV so that PBV may be committed to more than 25% of the units in family developments without required provision of supportive services (HCV)

Closed out in FY2014 as the Agency is no longer be seeking authorization to commit more than 25% of units at any one development to PBV without the provision of supportive services. The Agency offers supportive services pursuant to Low Income Housing Tax Credit (LIHTC) requirements for existing new development projects.

FY2011-8 – Revise Mobility Rules

Closed out in FY2014 and replaced with FY2015-3 Modified Project-Based Vouchers.

FY2013-2 – Simplified Earned Income Disregard (SEID) - Only HCV Closing Out

Closed out in FY2014 as the activity was never implemented and the housing program has shifted resources to the successful implementation of the Rent Simplification (FY2014-6) and the MDRC/HUD Rent Reform Activity (FY2015-1).

V. SOURCES AND USES OF FUNDS

A. SOURCES AND USES OF MTW FUNDS

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

Sources of MTW Funds include the following:

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

SAHA's Board of Commissioners approved the consolidated operating budget on June 5, 2014, for FY2015. Consistent with the MTW plan, funds were obligated and expended to provide funding for the following:

- Salaries and Benefits, Repair Maintenance, Utilities, Protective Salaries (Security Services), insurance, and Other Expenses that represent the combined operating costs for PH and HCV
- Housing Assistance Payments (HAP) Expense for the HCV Program (payments to landlords)
- Expenditures related to the CFP and RHF grants
- Program and administration of MTW initiatives (described in the next section)
- Section 8 funding shortfall
- Preservation and Expansion of Affordable Housing
- Matching funds for the Choice Implementation Grant

MTW INITIATIVES

In FY2015, the Agency planned to utilize MTW single fund for the program administration and implementation of MTW initiatives. Below is a summary of FY2015 activity.

Education Partnerships

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

- REACH Awards: recognize and reward nearly 300 students annually for academic achievement. This fiscal year, the agency awarded 296 students.
- College Scholarship Program: funds scholarships for up to 50 students annually to provide much needed support to ensure higher educational achievement. This fiscal year, the agency awarded scholarships for 40 students.
- Education Summit: provides up to 900 residents annually with access to education and college resources, financial literacy, and other self-help resources. This fiscal year, the agency's Education Summit had 772 residents, 85 volunteers, and 122 exhibitors.

Resident Ambassador Empowerment Program

The Resident Ambassador Program employs 16 residents throughout the year, providing meaningful work experience for residents. SAHA has found that this program is an effective strategy to engage all residents in educational, training, workforce development, and other self-sufficiency programs.

Summer Youth Program

The Summer Youth Employment Program employed 90 resident youth this fiscal year, providing work experience and capacity development such as resume writing, banking/financial literacy, interview skills, conflict resolution and other life and workforce development soft skills. The Agency also partnered with Workforce Solutions Alamo to provide employment for an additional 30 youth.

Health and Wellness

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

- Golden Gala: much-loved annual event that served 813 elderly and disabled residents with 120 volunteers and 62 performers.
- H2A (Healthy Habits Active) Living Awards: highlight resident involvement and engagement in civic engagement, health, and other quality of life activities. This fiscal year, the agency recognized and awarded residents for the Resident Council Leadership Award, GEM (Go the Extra Mile) Award, Healthy Hero Award, Good Neighbor Award, Fuerza Award, and the H2A Living Award.
- Annual Father's Day initiative: engaged 417 families in positive family activities and recognize fathers' contributions through "El Hombre Noble" awards.

V.3.Report.Sources and Uses of MTW Funds	
A. MTW Report: Sources and Uses of MTW Funds	
Actual Sources and Uses of MTW Funding for the Fiscal Year	
PHAs shall submit their unaudited and audited information in the prescribed FDS format through the Financial Assessment System - PHA (FASPHA), or its successor system	
Describe the Activities that Used Only MTW Single Fund Flexibility	
<p>SAHA's Board of Commissioners approved the consolidated operating budget on June 5, 2014, for FY2015. Consistent with the MTW plan, funds were obligated and expended to provide funding for the following:</p> <ul style="list-style-type: none">• Salaries and Benefits, Repair Maintenance, Utilities, Protective Salaries (Security Services), insurance, and Other Expenses that represent the combined operating costs for PH and HCV• Housing Assistance Payments (HAP) Expense for the HCV Program (payments to landlords)• Expenditures related to the CFP and RHF grants• Program and administration of MTW initiatives (described in the previous section)• Section 8 funding shortfall• Preservation and Expansion of Affordable Housing• Matching funds for the Choice Implementation Grant	

B. LOCAL ASSET MANAGEMENT PLAN

(TABLES FROM FORM 50900)

V.4.Report.Local Asset Management Plan	
B. MTW Report: Local Asset Management Plan	
Has the PHA allocated costs within statute during the plan year?	<input checked="" type="checkbox"/>
Has the PHA implemented a local asset management plan (LAMP)?	<input type="checkbox"/>
	or
	<input checked="" type="checkbox"/>
<p>If the PHA is implementing a LAMP, it shall be described in an appendix every year beginning with the year it is proposed and approved. It shall explain the deviations from existing HUD requirements and should be updated if any changes are made to the LAMP.</p>	
Has the PHA provided a LAMP in the appendix?	<input type="checkbox"/>
	or
	<input checked="" type="checkbox"/>
<div style="border: 1px solid black; background-color: yellow; text-align: center; padding: 5px;">N/A</div>	

C. COMMITMENT OF UNSPENT MTW FUNDS

The Agency has not received written notice of a definition of MTW reserves; therefore, this section of the report is not required to be completed.

(TABLES FROM FORM 50900)

V.5.Report.Unspent MTW Funds			
C. MTW Report: Commitment of Unspent Funds			
<p>In the table below, provide planned commitments or obligations of unspent MTW funds at the end of the PHA's fiscal year.</p>			
Account	Planned Expenditure	Obligated Funds	Committed Funds
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Type	Description	\$ X	\$ X
Total Obligated or Committed Funds:		0	0
<p>In the body of the Report, PHAs shall provide, in as much detail as possible, an explanation of plans for future uses of unspent funds, including what funds have been obligated or committed to specific projects.</p>			
<p>Note: Written notice of a definition of MTW reserves will be forthcoming. Until HUD issues a methodology for defining reserves, including a definition of obligations and commitments, MTW agencies are not required to complete this section.</p>			

MTW AGREEMENT ATTACHMENT D: UPDATE ON RHF FUNDS INCLUDED IN THE MTW BLOCK GRANT

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

Note: Wheatley Courts (CNI) Phase II – onsite development’s total number of units has changed from 220 in the FY14 report to 215 in this year’s report, reducing the number of market rate units from 64 to 59. This changed was approved on July 15, 2015, as part of the Mixed-Finance process.

MTW Report Replacement Housing Factor Fund Expenditures 2015 Fiscal Year As of June 30, 2015													
Project Name	Units						Estimated Completion Date	% of Completion	RHF Grant	RHF Grant Number	RHF Allocation	RHF Funds Expended	Remaining to Expend
	Total	Public Housing	PBV	City HOME	Tax Credits	Market							
The Park at Sutton Oaks (Sutton II)	208	49			113	46	June 2014	100%	2006 RHF 2nd Increment	TX59R006502-06	\$ 2,608,481.00	\$ 2,608,481.00	\$ -
									2008 RHF 2nd Increment	TX59R006502-08	\$ 209,083.10	\$ 209,083.10	\$ -
									Total Sutton II		\$ 2,817,564.10	\$ 2,817,564.10	\$ -
The Gardens at San Juan Square (San Juan III)	252	63	31	27	131		December 2014	100%	2009 RHF 2nd Increment	TX59R006502-09	\$ 1,408,098.00	\$ 1,408,098.00	\$ -
									2009 RHF 2nd Inc. Add'l	TX59R006504-09	\$ 918,844.44	\$ 918,844.44	\$ -
									2010 RHF 2nd Increment	TX59R006502-10	\$ 1,718,182.56	\$ 1,718,182.56	\$ -
									2011 RHF 2nd Increment	TX59R006502-11	\$ 383,875.00	\$ 383,875.00	\$ -
Total San Juan III		\$ 4,429,000.00	\$ 4,429,000.00	\$ -									
Wheatley Courts (Relocation)									2012 RHF 2nd Increment	TX59R006502-12	\$ 76,939.00	\$ 76,939.00	\$ -
Wheatley Courts (CNI) Phase II - Onsite	215	71	8		77	59	December 2016	Planning	2008 RHF 2nd Increment	TX59R006502-08	\$ 337,900.47	\$ 337,900.47	\$ -
									2009 RHF 1st Increment	TX59R006501-09	\$ 91,863.00	\$ 91,863.00	\$ -
									2009 RHF 2nd Inc. Add'l	TX59R006504-09	\$ 200,461.56	\$ 200,461.56	\$ -
									2010 RHF 1st Increment	TX59R006501-10	\$ 360,291.00	\$ 360,291.00	\$ -
									2010 RHF 2nd Increment	TX59R006502-10	\$ 92,541.44	\$ 92,541.44	\$ -
									2011 RHF 1st Increment	TX59R006501-11	\$ 661,479.00	\$ 185,060.63	\$ 476,418.37
									2011 RHF 2nd Increment	TX59R006502-11	\$ 41,851.00	\$ 41,851.00	\$ -
									2012 RHF 1st Increment	TX59R006501-12	\$ 520,769.00	\$ -	\$ 520,769.00
									2013 RHF 1st Increment	TX59R006501-13	\$ 549,153.00	\$ 549,153.00	\$ -
									2013 RHF 2nd Increment	TX59R006502-13	\$ 84,890.00	\$ 84,890.00	\$ -
									2014 RHF 1st Increment	TX59R006501-14	\$ 530,328.00	\$ -	\$ 530,328.00
2014 RHF 2nd Increment	TX59R006502-14	\$ 79,058.00	\$ -	\$ 79,058.00									
Total Wheatley Courts		\$ 3,550,585.47	\$ 1,944,012.10	\$ 1,606,573.37									
Development Activity							Planning	Planning	2015 RHF 1st Increment	TX59R006501-15	\$ 321,414.00	\$ -	\$ 321,414.00
									2015 RHF 2nd Increment	TX59R006502-15	\$ 80,032.00	\$ -	\$ 80,032.00
									Total Development Activity		\$ 401,446.00	\$ -	\$ 401,446.00

VI. ADMINISTRATIVE

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

This fiscal year, SAHA had a total of 65 EHS (Exigent Health and Safety) issues across 7 AMPs that required action. The majority of EHS issues were related to missing or non-functioning smoke detectors. All EHS issues were addressed by the Agency within 24 hours.

- B. Results of latest PHA-directed evaluations of the demonstration.

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

- C. Certification that the PHA has met the three statutory requirements

See the following page.

Certification of MTW Statutory Compliance

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

1) Assuring that at least 75 percent of the families assisted by the Agency are very low-income families;

At fiscal year-end, 17,524 households out of a total of 17,996 or 97% households were very low-income (<50% AMI).

As of 6.30.2015			
	Total Households	Number below 50% AMI	% Below 50% AMI
PH	5,750	5,636	98%
Vouchers	12,090	11,799	98%
Other (Local, Non-Traditional)	156	89	57%
Total	17,996	17,524	97%

2) Continuing to assist substantially the same total number of eligible low- income families as would have been served had the amounts not been combined; and

The Agency’s FY2015 MTW families served (annual average) is 17,499 out of 17,803 MTW adjusted baseline denominator (98%). At fiscal year end, the Agency improved leasing across all programs to achieve 101% of the MTW baseline denominator. While the Agency did experience a nominal dip during FY2015, SAHA continues to serve substantially the same number of households as it did upon entering the MTW demonstration.

	MTW – Serving Substantially the Same			Updated Total Households Served at Fiscal Year-End	
	MTW Baseline Denominator	MTW Baseline Numerator (Annual Average Leasing)	MTW Baseline Compliance Calculation	MTW Baseline Numerator for June 2015	MTW Baseline Compliance Calculation for June 2015
PH	5,684	5,598	98%	5,750	101%
Vouchers	12,119	11,790	97%	12,090	100%
Other (Local, Non-Traditional)	N/A	111	N/A	156	N/A
Total	17,803	17,499	98%	17,996	101%

3) Maintaining a comparable mix of families (by family size) served, as would have been provided had the amounts not been used under the demonstration.

While 2-person, 3-person, 4-person, and 6+ person households show a percent change over 5%, the absolute differences between the baseline and FY2015 is only 1.1%, -1.2%, -1.2%, and .05%, respectively. The overall range of absolute differences across all household sizes is 0% to 1.8%, indicating the Agency is still serving a comparable mix of households by household size.

Mix of Family Sizes Served

	1 Person	2 Person	3 Person	4 Person	5 Person	6+ Person	Totals
Baseline Percentages of Household Sizes to be Maintained **	36%	16%	18%	15%	9%	7%	100%
Number of Households Served by Family Size this Fiscal Year ***	6,674	3,097	3,017	2,432	1,518	1,102	17,840
Percentages of Households Served by Household Size this Fiscal Year ****	37%	17%	17%	14%	9%	6%	100%
Percentage Change	5%	7%	-6%	-8%	-1%	-8%	0%
Absolute Percentage Change	2%	1%	-1%	-1%	0%	-1%	0%



 David Nisivoccia
 Interim President and CEO

9.29.15
 Date

Moving to Work Annual Report

Fiscal Year 2014: July 1, 2014 to June 30, 2015

Submitted September 30, 2015

