

**Strategic Plan**  
**of the Housing Authority**  
**of the City of San Antonio**



**June 25, 2012**

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## **I. Executive Summary**

In January 2012, the San Antonio Housing Authority (SAHA) embarked on a long-term agency strategic planning process known as Plan.Build.Live. that actively engaged the broader San Antonio community to: establish a shared understanding of SAHA's mission; create a shared vision for the future; and identify clear goals and priorities to help advance the agency toward its vision for 2020. The resulting strategic plan was developed over a five-month period through planning sessions with SAHA's Board of Commissioners, senior team, staff, residents, landlords, and other community stakeholders.

The strategic plan builds on significant internal steps toward agency transformation made at SAHA since 2009. It acknowledges the challenges facing the agency and the city of San Antonio, and seeks to maximize current opportunities to provide greater leadership in San Antonio and at a national level.

### ***Core Values and Beliefs***

SAHA's Board and staff articulated the following shared core beliefs/values that helped guide Plan.Build.Live.:

- The unmet need for affordable housing in San Antonio is great and will require effective collaboration among a wide range of stakeholders
- SAHA's leadership and advocacy in the housing and community development field is critical
- Housing assistance should be transitional, not permanent, so that SAHA may help as many people in need as possible
- Our people are our greatest asset and we must invest in them. We believe in the value of each person and, therefore, we must live a culture of respect, integrity, and collaboration among staff, residents, and partners
- We believe in the promise of each child and, therefore, seek to create a culture of education throughout our communities

***Vision: Create dynamic communities where people thrive.***

The City of San Antonio recently engaged thousands of its residents to create a vision for San Antonio in 2020: “Growing into a world class city, while holding on to what makes us special.”<sup>1</sup> As co-chair of the Neighborhoods and Growth Management group, SAHA will take a lead role in the implementation of the SA2020 vision by working with key partners to ensure that, by 2020, “San Antonio is known for its cohesive neighborhoods with compelling and unique personalities.” Through SAHA’s strategic planning process, its leadership articulated a vision for SAHA that is aligned with the SA2020 vision.

***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.***

SAHA’s core focus is affordable housing and its core business includes the administration of Section 8 funds, property management of all owned and managed public and non-profit/tax credit partnership housing, and development of mixed-income housing that is well integrated into the surrounding community. SAHA also has a responsibility to create and maintain strategic partnerships with social service providers, educators and employers to advance family self-sufficiency among its residents so they may improve their lives and reduce their need for housing assistance, thereby enabling SAHA to help more families in need. Moving forward, SAHA endeavors to enhance people’s lives through the provision of housing assistance in times of need, improve and strengthen its communities and neighborhoods, and meet the growing demand for safe, affordable, temporary housing.

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<sup>1</sup> SA2020, p. 5

## *Strategic Goals*

To achieve its vision and fulfill its mission, SAHA will focus its financial and human resources to implement the following six (6) 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.

These agency-wide goals address the three statutory goals that HUD requires all MTW agencies to address in its annual MTW plan and are consistent with the four goals that SAHA articulated in its 2011-2012 MTW Plan. SAHA intends to make this strategic plan a “living” plan that will be reviewed and revised every year and integrated with the agency’s annual budget review and MTW planning processes. The agency will establish a comprehensive strategic and operational scorecard including metrics and benchmarks for performance and goals to be achieved under this plan.

SAHA leaders agree that they cannot be complacent with simply managing programs and scarce housing funds. SAHA must be a vibrant and proactive housing authority that is responsive to local housing needs, addresses the backlog in capital improvements in public housing, delivers high quality service in operations, and fosters partnerships to bring key educational, employment and human services to the thousands of families and individuals they serve. To do this, SAHA will be transformational and have a coordinated strategy with a focus on exceptional operational performance, neighborhood reinvestment, and bold and effective partnerships to help residents transform their lives.

## **II. Introduction**

SAHA is one of the 15 largest public housing authorities in the United States and provides housing for nearly 27,000 of San Antonio's poorest and most vulnerable families through three housing programs – public housing, Section 8, and non-profit and tax credit partnership housing developments. Currently, SAHA owns and manages approximately 6,300 units of public housing, provides Section 8 vouchers to over 13,400 families and serves an additional 6,800 families through its non-profit and tax credit partnerships portfolio. SAHA employs approximately 600 people and has an annual budget of approximately \$170 million.

In January 2012, SAHA embarked on a long term agency strategic planning process known as Plan.Build.Live. that actively engaged the broader San Antonio community to: establish a shared understanding of SAHA's mission; create a shared vision for the future; and identify clear goals and priorities to help advance the agency toward this vision.

By engaging the Plan.Build.Live. process to produce a long-term strategic plan for the agency, SAHA recognized and embraced its new role in the community, as a social integrator of necessary support activities. These activities rely on a solid foundation of quality housing, but extend to vital arenas such as education, health care, nutrition, and job training. Quality housing is critical to providing the stability needed to make a positive, lasting impact on people's lives. It is also clear that if residents are to move to economic stability, SAHA will need to provide access to resources and create opportunities to improve their educational and earning potential. It's good social policy and also makes good business sense, given diminishing funding and the challenge of providing sufficient quality affordable housing in San Antonio.

SAHA recognized, early in the Plan.Build.Live. process, that the agency does not and cannot work alone. The agency's existing partnerships have yielded solid results and today nearly 1,000 residents are enrolled in self-sufficiency programs. In order to increase the number of accomplishments, more national and local partnerships will need to be developed.

Plan.Build.Live. builds on significant internal steps toward agency transformation made at SAHA since 2009, which include:

- completing an internal assessment of the agency's operations and finances;

- establishing immediate priorities and annual plans/goals;
- achieving significant improvements in the management of the Section 8 and public housing programs, resulting in SAHA achieving high performer status on HUD's Section Eight Management Assessment Program (SEMAP);
- obtaining HUD's approval for SAHA's agency-wide Moving To Work designation and plan;
- developing an *Affordable Housing Preservation and Expansion Policy* and plan; and
- favorable resolution of a long-standing legal battle with builders in connection with construction quality problems at Mirasol Homes.

SAHA's leadership, seeking to be proactive, systematic and thoughtful about planning and communication, designed Plan.Build.Live. to involve a broad array of stakeholders – including residents, community leaders, and partners – and address key questions, including the following.

- What is SAHA's vision for the future?
- Where should SAHA focus its resources to achieve its vision?
- What are key potential opportunities?
- How can key challenges be overcome?
- How will SAHA leverage its strengths and assets and leverage what others are doing?
- What are the major initiatives underway?
- What others efforts should SAHA take on?
- What initiatives or functions should SAHA stop altogether or partner/outsource?

SAHA engaged HausAngeles to: a) facilitate a fact-based planning process with SAHA's Board of Commissioners and senior team; b) solicit input and feedback from key city leaders; and c) lead the development of the agency's strategic plan. To ensure that the strategic planning process included and reflected the needs and interests of the broader community, SAHA engaged Ximenes and Associates to lead its community engagement process with staff, residents and community stakeholders. With direction from SAHA staff, the HausAngeles Team incorporated input obtained through the community engagement process. The heart of this strategic plan -- the agency's vision, mission, and goals, as well as specific objectives – will guide SAHA's efforts between now and 2020. The plan also documents the many discussions, meetings, and presentations that led to the final language. All the reports and presentations that were created for Plan.Build.Live. are included in the Appendices.

### **III. The Strategic Planning Process: Plan.Build.Live.**

The planning process took place along two parallel tracks: a Leadership Visioning track focused on the Board of Commissioners and led by HausAngeles, and a Community Engagement track focused on broad stakeholder engagement and led by Ximenes & Associates. Near the beginning of the process, Creative Civilization led a branding discussion with the Board which led to the adoption of the “Plan.Build.Live.” name and logo.

This section describes the different activities that were undertaken under each track.

#### ***Leadership Visioning***

The Leadership Visioning track included the following activities:

- Review and analysis of SAHA plans and data;
- Review of other strategic plans, including HUD and other housing authorities;
- Three (3) facilitated planning sessions with SAHA Board and executive staff;
- Three (3) facilitated planning sessions with SAHA senior staff;
- Interviews with thirteen (13) key leaders in the City of San Antonio;
- Review of local partners’ plans to identify areas of common interest/ shared priorities.

Below is a list of documents and plans that were reviewed, analyzed and integrated into the development of SAHA’s plan.

#### ***SAHA Data and Plans***

- SAHA’s Governing documents (charter, by-laws, etc.)
- SAHA’s 2011-2012 MTW Annual Plan and Report
- SAHA’s Proposed MTW 2012-2013 Agency Plan
- Departmental Work Plans
- Summary of 2011 Board Strategic Planning Retreat (February 2011)
- Affordable Housing Preservation & Expansion Policy (May 2011) and Plan (Aug 2011)



- State of the Agency (August 2009)

#### *Other Relevant Plans*

- HUD's Strategic Plan for FY2010-2015
- Report to Congress - Moving to Work: Interim Policy Applications and the Future of the Demonstration, HUD, August 2010
- Plan NYCHA: A Roadmap for Preservation, December 2011
- Atlanta Housing Authority's 2011 MTW Plan, April 2010
- Other Housing Authorities (e.g., Los Angeles, Baltimore, Portland)

#### *Local Plans*

- City of San Antonio's Five Year Consolidated Plan, FY 2011-2015, August 2010
- City of San Antonio – San Antonio Comprehensive Master Plan Framework: Shaping the Future of San Antonio, November 2010
- Centro Partnership – Strategic Framework Plan for the Center City, December 2011
- VIA – 2035 Long Range Comprehensive Transportation Plan, July 2011

#### *Facilitated Sessions with Board and Executive Staff*

A presentation was made to the Board in mid-January to kick-off Plan.Build.Live. On January 31<sup>st</sup>, an initial planning session with the Board and executive staff sought consensus on key questions that would impact the development of SAHA's Vision, Mission, and Goals. A second planning session on April 9<sup>th</sup> discussed the feedback and recommendations from a sequence of community engagement meetings, and key leader interviews. That planning session produced the following elements of the agency's strategic plan: a) draft Vision Statement; b) draft Mission Statement; c) a draft of the 3-5 most important Strategic Goals. On May 15<sup>th</sup>, the final planning session was conducted with the Board and executive staff to solicit the group's feedback on

revised versions of the agency's Mission, Vision, Goals, and to discuss, develop and integrate objectives under each of the strategic goals.

### *Facilitated Sessions with Senior Staff*

In addition to the facilitated sessions with the Board and five (5) executive staff members, three (3) planning sessions were facilitated with over twenty members of SAHA's senior team to ensure that there was input, buy-in, and support from the team that will be responsible for successful implementation of the plan.

### *Engaging San Antonio Leaders*

Between January and May of 2012, interviews with thirteen (13) key leaders across the city representing the public, non-profit, business and foundation community were conducted to solicit their input and feedback on SAHA's role in the city of San Antonio and its developing plan. Those leaders included:

- Mayor Julián Castro (with Frances A. Gonzalez)
- Sheryl Sculley, City Manager
- Judge Nelson Wolff (with Aurora Sanchez)
- Richard Lopez, HUD (with Joe Uviedo)
- City Councilwoman Ivy Taylor
- Pat Frost, Frost Bank (with Donna Normandin)
- Henry Cisneros, City View
- Palmer Moe, The Kronkosky Charitable Foundation (with Tom McGuire)
- Andres Andujar, HemisFair Park Area Redevelopment Corp. (with Omar Gonzalez)
- Darryl Byrd, SA2020
- George Block, Haven for Hope (with Scott Ackerson)
- Toni Van Buren, United Way
- Navarra Williams, SAMMinistries (with Norma Jean Huerta and Dorothy Morris)

Interviews focused on the following key questions.

- How does SAHA and affordable housing fit into your vision for San Antonio?
- What is the perception of SAHA's role and efforts in the community?
- What can SAHA do to enhance its reputation?
- What are SAHA's strengths and weaknesses as a partner?
- What opportunities might there be to partner in the future?
- What are some shared goals or areas of priority?

In addition to integrating leaders' responses to these questions into the strategic planning discussion with SAHA Board and staff, those responses are summarized in a report in the appendices.

### ***Community Engagement***

The stakeholder and community involvement component of the strategic planning effort was led by Ximenes & Associates, Inc., a San Antonio-based public involvement and facilitation consulting firm. This part of the process consisted of a series of stakeholder meetings, two public meetings, and focus group sessions.

The initial round of stakeholder meetings took place after the first Board Retreat (Jan 31) and before the first Public Meeting (March 24). This round of meetings focused on developing vision elements, by asking "*What do you want to see in place in 2020, as a result of your/SAHA's actions?*" From February 28 to March 21, 2012, 19 meetings were held with employees, Section 8 participants, Section 8 landlords, and representatives from SAHA's Resident Leadership Council.

Following the initial phase of stakeholder meetings, the first Community Meeting, held on March 24, integrated Plan.Build.Live. with the ongoing SA2020 initiative. SAHA leadership recognized that Plan.Build.Live. was not taking place in isolation, and that SAHA's future goals were intertwined with those of many partner organizations. During the Public Meeting,

participants were asked to identify and share their thoughts about how SAHA can contribute to specific SA2020 goals and how attendees/organizations could support SAHA's effort.

After the Board of Commissioners created a first draft of the vision, mission, and strategic goals at the April 9<sup>th</sup> Board session, a second set of 14 stakeholder meetings took place between April 24 and May 4. Stakeholders were invited to provide feedback on the draft items and suggest actions that SAHA could take to achieve the goals. External stakeholders brought into the discussion at this stage included current and potential service partners, non-profit organizations, public agencies, and real estate developers. The purpose of this series of meetings was to gather feedback and collect suggestions on action items to achieve the proposed goals. Each group was asked, *“What innovative, substantial actions could lead SAHA to achieve its goals as proposed here today?”*

The second Community Meeting took place on May 8. Table groups were asked to focus on one of the proposed strategic goals along with the suggested actions from the mini-workshops associated with each. On May 22, an abbreviated version of this exercise took place during the Landlord Symposium.

## IV. History and Context

### *A Brief History of SAHA*

SAHA will celebrate its 75<sup>th</sup> anniversary in 2012. San Antonio's Board of City Commissioners created SAHA in 1937, shortly after Congress passed, and President Roosevelt signed, the Housing Act of 1937 (also known as the Wagner Steagall Act) to accomplish four goals: "to assist the construction industry, to stimulate employment, to shelter low-income families in publicly owned housing, and to clear slums."<sup>2</sup> On February 23, 1938, San Antonio Mayor C.K. Quin appointed the first five-member SAHA board.<sup>3</sup> According to historical records, SAHA was established with "a dual purpose: 1) to provide decent, safe and sanitary housing to poor families and individuals who live in substandard dwellings and cannot get adequate housing in the private market; and 2) to remove slums and blighted areas."<sup>4</sup>

Between 1938 and 1941, with funding from the Federal Public Housing Authority (FPHA), SAHA built its first five developments – Alazan Courts, the Apache Courts extension, Victoria Courts, Wheatley Courts and Lincoln Heights Courts.<sup>5</sup> Between 1942 and 1949, SAHA entered into agreements with the FPHA to manage, operate and maintain three War Housing Projects: Carson Homes at Fort Sam Houston, Kelly Homes and Brook Homes and, with FPHA funds, focused on providing emergency housing for veterans, mainly through the conversion of abandoned barracks and other buildings at Stinson Field. By the end of 1949, SAHA had turned over the management and operations of the veterans housing to the City and returned its focus to

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<sup>2</sup> Tamez, Diamantina, *History of the San Antonio Housing Authority: A Research Project* presented and approved by the Department of Urban Studies of Trinity University, May 12, 1984; p. 1.

<sup>3</sup> San Antonio Housing Authority, Historical Records: *First Board of Directors*, 1938.

<sup>4</sup> Tamez, p. 8

<sup>5</sup> The FPHA later became the United States Housing Authority (USHA) and is now the Department of Housing and Urban Development (HUD).

managing the 2,554 units it developed between 1938 and 1941 and to developing more affordable housing, thanks to the passage of the Housing Act of 1949.<sup>6</sup>

Between 1949-1954, under the leadership of Marie McGuire, SAHA completed the construction of additional developments, including San Juan Homes (1951), S.J. Sutton Homes (1951), East Terrace/Spring View Apartments (1951), Mirasol Homes (1953), Cassiano Homes, Menchaca Homes, Villa Veramendi, and the San Juan Annex. After completing construction of these developments or its “1949 program”, SAHA operated 5,154 units.<sup>7</sup> In 1956, when the national housing program instituted a priority for the elderly, SAHA – still under Ms. McGuire’s leadership – responded by building housing designed to serve the elderly and disabled such as Victoria Plaza (1960).<sup>8</sup> Subsequently, when HUD encouraged housing authorities to increase the stock of affordable housing through acquisition and rehab, SAHA responded by acquiring and rehabilitating 14 developments between 1968-1980.

The Housing and Urban Development Act of 1965 introduced the leased housing program and the Housing and Community Development Act of 1974 shifted the focus from the traditional housing program to the leased housing model that supported public housing in the private market.<sup>9</sup> As a result, SAHA created its Section 8/Housing Assistance Payment (HAP) program

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<sup>6</sup> Tamez, p. 23

<sup>7</sup> Tamez, p. 41

<sup>8</sup> Tamez, p. 49. Ms. McGuire became a national leader and advocate for housing the elderly before being appointed as Commissioner of the Public Housing Administration. At the Public Housing Administration, Ms. McGuire developed the “turnkey system” – a new method that allowed private homebuilders to develop public housing and sell it to public housing authorities – and the scattered sites public housing (SSPH) program. Between 1971 and 1982, SAHA used the turnkey system for the construction of an additional 21 developments such as Cheryl West Apartments (1975) and Cross Creek Apartments (1977).

<sup>9</sup> Tamez, p. 63. The Section 23 leased housing program allowed housing authorities to negotiate a leasing contract with private landlords and then lease the unit to a tenant.

in 1975 and, by 1984, managed relationships with 2,700 private property owners and provided assistance to 5,593 households.<sup>10</sup> In 1980, SAHA began administering its Section 8 Moderate Rehabilitation (Mod Rehab) program, providing financial incentives so that private property owners can rehabilitate their substandard housing units up to HUD standards. By the early 1980s, funding for new construction had decreased significantly, and the federal government shifted its focus and funding to the Section 8 program, acquisition and rehab, and a limited Comprehensive Improvement Assistance Program (CIAP) – or the comprehensive modernization (comp mod) program - to make major improvements at older developments that were reaching the end of their useful life.

In 1992, in response to the findings of the National Commission on Severely Distressed Public Housing, Congress enacted and HUD launched the Housing Opportunities for People Everywhere (HOPE) VI program.<sup>11</sup> The program was designed to help housing authorities redevelop severely distressed projects into lower density, mixed-income developments that were better integrated into the surrounding community. HOPE VI grants also provided funding for community supportive service (CSS) programs that promote resident self-sufficiency. SAHA submitted three successful HOPE VI applications to revitalize Victoria Courts, Mirasol, and Springview. By 1998, regulatory changes such as the Mixed-Finance Rule, and the 1998 Quality Housing and Work Responsibility Act (QHWRA) reinforced HUD’s preference for mixed-income developments and mixed-finance deals. SAHA has embraced this model and, between 1994 and 2010, increased its non-public housing stock by 46%.<sup>12</sup>

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<sup>10</sup> Tamez, p. 64.

<sup>11</sup> In 1989, Congress established the National Commission on Severely Distressed Public Housing and charged it with “identifying “severely distressed” public housing developments, assessing strategies to improve conditions at these developments, and preparing a national action plan for dealing with the problem.” The Urban Institute and The Brookings Institution, *A Decade of HOPE VI: Research Findings and Policy Challenges*, May 2004, p. 1

<sup>12</sup> HUD multifamily project listing, 2010.

SAHA's history demonstrates that, for almost 75 years, SAHA has been a housing and community development leader in San Antonio. SAHA has built a legacy of providing housing for many of San Antonio's poorest residents and helping to implement national housing policy. With much of its current public housing stock having been developed prior to 1955, SAHA is also faced with the challenging legacy of an aging housing stock.

### ***SAHA's Transformational Path (2009-2012)***

Since 2009, SAHA's President and CEO Lourdes Castro Ramírez has worked closely with SAHA's Board of Commissioners and staff to transform the agency's operations, improve its communities, and leverage additional resources. Below are a few examples of SAHA's achievements since 2009.

#### Operations

- HUD and SAHA signed an expanded, amended, and restated Moving to Work (MTW) agreement.
- SAHA's Section 8 program was designated a "High Performer" by HUD.
- The HUD Office of Inspector General (OIG) issued a "no findings" audit of American Recovery and Reinvestment Act (ARRA) funds.
- SAHA received multiple local and national awards, and recognition from industry leaders, such as NAHRO.

#### Communities

- SAHA has completed 1,007 mixed-income housing units at five new communities:
  - HemisView Village
  - Sutton Oaks
  - The Mirabella
  - San Juan Square II
  - Artisan at Creekside



- SAHA submitted the Wheatley Courts CHOICE Neighborhood Implementation Grant Application in April 2012.

### Funding

- \$20 million in stimulus funding (ARRA) to preserve public housing.
- \$12 million from Mirasol lawsuit settlement.
- \$3.9 million in new funding, including private funds, to expand education enrichment, job training, job creation, health awareness, and wellness programs for residents (JobsPlus)

### *Moving to Work Designation*

The Moving to Work (MTW) program was authorized by Congress in 1996 and implemented by HUD in 1999. The MTW program was established to “give public housing authorities and HUD the flexibility to design and test various approaches to providing housing assistance.”<sup>13</sup> SAHA is the 6<sup>th</sup> largest public housing authority among the thirty-five (35) that participate in HUD’s MTW program. In 2000, SAHA began a modest MTW program at three SAHA sites: Mission Park Apartments, Wheatley Courts, and Lincoln Heights Courts. In 2009, SAHA reached an agreement with HUD to expand the MTW program to the entire agency and its current agency-wide MTW designation is set to run through the agency’s 2018 fiscal year.

The MTW designation requires that SAHA submit an annual MTW plan that addresses three statutory goals: 1) reduce cost and achieve greater cost effectiveness in federal expenditures; 2) increase housing choices for low-income families; and 3) increase self-sufficiency by providing incentives to families with children where the head of household is working, seeking work or preparing for work.<sup>14</sup> The special designation allows SAHA the flexibility to combine the federal funds for public housing operations, capital improvements and Section 8 to design and test strategies to meet its MTW goals.

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<sup>13</sup> HUD Report to Congress, August 2010.

<sup>14</sup> HUD Report to Congress, August 2010.

### ***Who SAHA Serves***

SAHA provides housing assistance to more than 19,000 of San Antonio's poorest and most vulnerable families through public housing and the Section 8 program. Approximately 6,300 of these families live in public housing units at 40 family developments and 38 mixed population (i.e., for elderly and disabled) buildings while 13,400 families rely on Section 8 vouchers to subsidize rental housing owned by private landlords throughout the City.

The average annual household income of families in public housing and Section 8 housing is \$9,200 and \$10,988 respectively. The average length of participation in the public housing program is 5.7 years, with 59% leaving the program within 5 years and 82% leaving within 10 years. In the Section 8 program, the average tenure is 6.3 years; about 53% of families leave the program during the first 5 years, 23% use their vouchers for 5-10 years, 21% use them for 10-15 years, and 4% rely on voucher assistance for more than 15 years.<sup>15</sup>

The 19,000 families served by SAHA's public housing and housing voucher programs include over 51,000 individuals. White Hispanics account for 75% of these individuals, 18% are Black non-Hispanic and 5% are White non-Hispanic. While almost one-half of the *heads of households* are elderly or disabled persons, the majority of *individuals* served (28,000) are under the age of 20, and more than one-third (15,700) are children under the age of 10.<sup>16</sup> Nine percent (9%) of assisted individuals are over the age of 60. See Table 1.

Table 1: Demographics of Individuals served by SAHA's Public Housing & Section 8 programs<sup>17</sup>

### **Total Count of Population & Households, by Program**

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<sup>15</sup> SAHA, May 2012.

<sup>16</sup> Public Housing Fact Sheet, SAHA, January 2012.

<sup>17</sup> Demographics for residents in SAHA's non-profit and tax credit partnership units were not available.

	Public Housing	Housing Choice Voucher Program	Total
<b>Number of Individuals</b>	14,435	36,549	50,984
<b>Number of Households</b>	5,966	13,225	19,191

Source: SAHA Data, Average of monthly snapshots from January 2012 to April 2012

### Gender of Population, by Program

	PH	% of PH Total Population	HCV	% of HCV Total Population	PH & HCV	% of Total PH and HCV Population
<b>Total Population</b>	14,435		36,549		50,984	
<b>Female</b>	8,679	60.1%	22,630	61.9%	31,309	61.4%
<b>Male</b>	5,757	39.9%	13,919	38.1%	19,675	38.6%

Source: SAHA Data, Average of monthly snapshots from January 2012 to April 2012

### Gender of Heads of Household, by Program

	PH	% of PH Total Population	HCV	% of HCV Total Population	PH & HCV	% of Total PH and HCV Population
<b>Total Heads</b>	5,966		13,225		19,191	
<b>Female Heads</b>	4,418	74.1%	10,856	82.1%	15,274	79.6%
<b>Male Heads</b>	1,548	25.9%	2,370	17.9%	3,918	20.4%

Source: SAHA Data, Average of monthly snapshots from January 2012 to April 2012

### Race and Ethnicity, by Program

	PH	% of PH Total Population	HCV	% of HCV Total Population	PH & HCV	% of Total PH and HCV Population
<b>Total Population</b>	14,435		36,549		50,984	
<b>Hispanic</b>	12,002	83.1%	27,258	74.6%	39,260	77%
<b>Hispanic Black</b>	113	0.8%	497	1.4%	610	1%
<b>Hispanic White</b>	11,880	82.3%	26,716	73.1%	38,596	76%
<b>Hispanic Other</b>	9	0.1%	30	0.1%	39	0%
<b>Non-Hispanic</b>	2,433	16.9%	9,291	25.4%	11,724	23%
<b>Non-Hispanic Black</b>	1,540	10.7%	7,252	19.8%	8,792	17%

<b>Non-Hispanic White</b>	847	5.9%	1,905	5.2%	2,752	5%
<b>Non-Hispanic Other</b>	46	0.3%	57	0.2%	103	0%

Source: SAHA Data, Average of monthly snapshots from January 2012 to April 2012

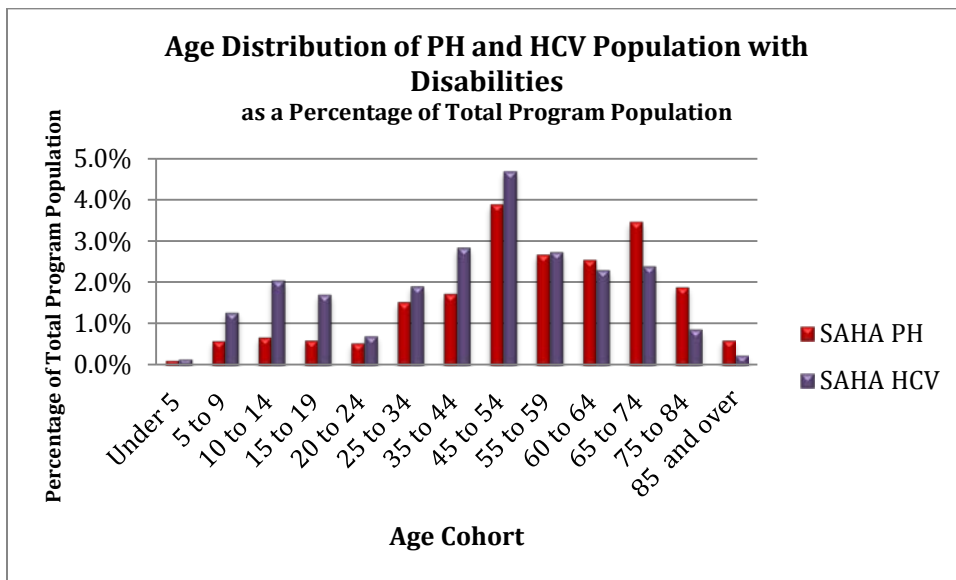
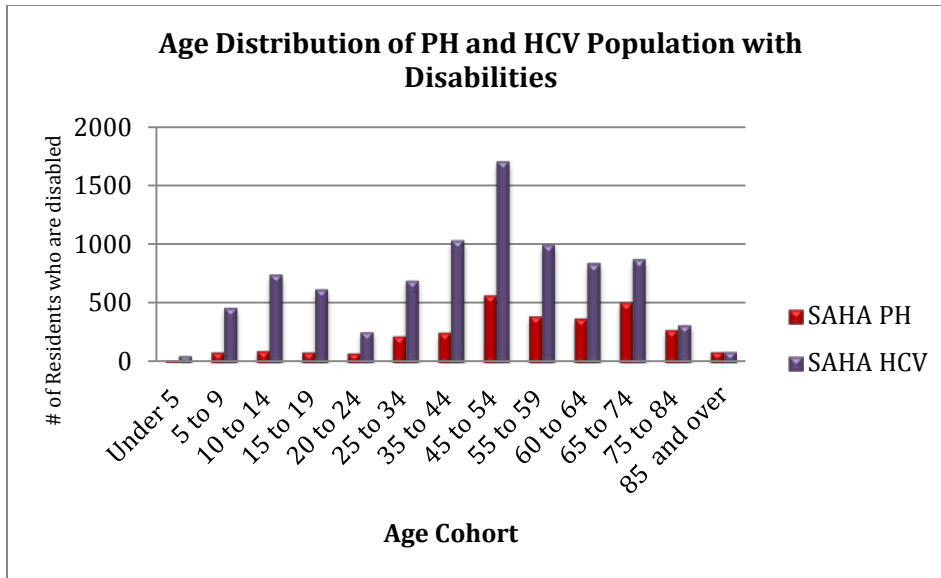
#### Age, by Program

	PH	% of PH Total Population	HCV	% of HCV Total Population	PH & HCV	% of Total PH and HCV Population
<b>Total Population</b>	14,435		36,549		50,984	
<b>0-4</b>	1,924	13%	3,145	8.6%	5,069	10%
<b>5-9</b>	2,648	18%	6,327	17.3%	8,975	18%
<b>10-14</b>	1,661	12%	6,040	16.5%	7,702	15%
<b>15-19</b>	1,126	8%	4,591	12.6%	5,718	11%
<b>20-24</b>	971	7%	1,849	5.1%	2,819	6%
<b>25-34</b>	1,710	12%	4,183	11.4%	5,893	12%
<b>35-44</b>	956	7%	3,502	9.6%	4,458	9%
<b>45-54</b>	945	7%	2,952	8.1%	3,897	8%
<b>55-59</b>	514	4%	1,352	3.7%	1,866	4%
<b>60-64</b>	456	3%	1,045	2.9%	1,500	3%
<b>65-74</b>	793	5%	1,035	2.8%	1,828	4%
<b>75-84</b>	502	3%	415	1.1%	917	2%
<b>85-105</b>	231	2%	115	0.3%	345	1%

Source: SAHA Data, Average of monthly snapshots from January 2012 to April 2012

#### Disability Status, by Program

	PH	% of PH Total Population	HCV	% of HCV Total Population	PH & HCV	% of Total PH and HCV Population
<b>Total Population</b>	14,435		36,549		50,984	
<b>Population with a disability</b>	3,026	21%	8,751	24%	11,777	23%



Source: SAHA Data, Average of monthly snapshots from January 2012 to April 2012; reflects age and disability status as of most recent re-certification as of monthly snapshot date; HCV Port-Outs are not included.

- The median age of individuals with a disability is 56 years in PH and 48 years in HCV.
- The average age of individuals with a disability is 52 years in PH and 43 years in HCV.
- The proportion of population with a disability is lower in PH than in HCV for all age cohorts under 60 years of age.

- PH serves a higher proportion of residents who have a disability and are 60 years and over than HCV.
- In both PH and HCV, the 45 to 54 age cohort of individuals with a disability makes up the largest share of each program's total population (3.9% and 4.7%, respectively).

## **V. Challenges and Opportunities**

The information gathered and analyzed during the initial planning stages revealed a number of challenges and opportunities. These were discussed in some detail during the facilitated sessions with the Board and staff.

### ***Challenges***

*San Antonio is thriving but there is also growing inequality.* San Antonio's population has grown significantly (by 16%) from 1,144,646 in 2000 to 1,327,381 in 2010.<sup>18</sup> As Table 2 demonstrates, much of the growth has occurred among higher income residents. From 2000 to 2010, the number of households in Bexar County with incomes between \$45,000 and \$75,000, between \$75,000 and \$100,000, and over 100,000 increased by 12%, 50%, and 92%, respectively. During this same period, the number of families with incomes under \$35,000 remained relatively stable, decreasing by only 7% or 9,000 households. The population earning over \$45,000 is growing robustly, but also indicates increasing inequality. Those earning less than \$45,000 have a need for affordable housing, especially poor families with children, seniors, veterans, homeless, and persons with special needs.

*There is a high need for safe, decent and quality affordable rental housing in San Antonio.* As of 2010, San Antonio is home to more than 200,000 households that earn less than 60% of the area median income (AMI) or \$34,680; 82,000 of these same households earn less than 30% of AMI (\$17,350). These lowest income families face the greatest challenges to finding and securing safe, quality and affordable shelter and often need subsidized housing.

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<sup>18</sup> During the same period, Bexar County's population grew by 23% from 1,392,931 in 2000 to 1,714,773 in 2010.

U.S. Census Bureau, <http://www.county.org/resources/countydata/products/towns.html>

Table 2: Bexar County Household Distribution, 2000 and 2010.

Household Income	2000	2010	Percent Change
<\$10,000-\$14,999	80,587	82,004	1.76%
\$15,000-\$34,999	136,168	126,804	-6.88%
\$35,000-\$44,999	56,559	57,723	2.06%
\$45,000-\$74,999	110,476	124,556	12.74%
\$75,000-\$99,999	40,307	60,484	50.06%
> \$100,000	46,007	88,761	92.93%

Source: Apartment Marketdata 2010 (Claritas, MapInfo)

*The need for affordable housing exceeds SAHA's current capacity.* As of June 2012, there were 20,125 people on SAHA waiting lists for: a) public housing units in family developments (15,363); b) public housing units in the elderly/disabled units (2,267); and c) Section 8 (2,495). According to Table 4, like current residents, people awaiting assistance from SAHA represent the most vulnerable in the city's population; 98% are extremely low-income (below 30% AMI), 78% are families, and 22% are elderly and/or self-identify as disabled. Finally, 81% of the people on these three waiting lists are Hispanic and 18% are African-American.



Table 4: Demographics of applicants on SAHA’s waiting lists

WAITING LISTS	PH - Family	%	PH - Elderly / Disabled	%	Section 8	%	Total	%
TOTAL	15,363		2,267		2495		20,125	
Average Days Waiting	414		217		1196			
<i>Race</i>								
White	13,662	88.9%	2,060	90.87%	1905	76%	17,627	88%
Black	1,469	9.6%	174	7.68%	514	21%	2,157	11%
Other	232	1.5%	33	1.46%	76	3%	341	2%
<i>Ethnicity</i>								
Hispanic or Latino	12,713	82.75%	1,924	84.87%	1752	70%	16,389	81%
Not Hispanic or Latino	2,499	16.27%	330	14.56%	713	29%	3,542	18%
Not Assigned	151	0.98%	13	0.57%	30	1%	194	1%
<i>Family Composition</i>								
Family	13,305	86.60%	72	3.18%	2374	95%	15,751	78%
Elderly	92	0.60%	451	19.89%	76	3%	619	3%
Disabled	1,966	12.80%	1,744	76.93%	45	2%	3,755	19%
<i>Income</i>								
Extremely Low	15,130	98.48%	2,224	98.10%	2379	95%	19,733	98%

Source: SAHA, January 2012.

The Section 8 waiting list for housing vouchers had been closed since 2007, but on May 15<sup>th</sup>, 2012 SAHA re-opened the waiting list. As of June 1, 2012, the new Section 8 waiting list has reached 14,825.

SAHA has an aged housing stock and an estimated backlog of capital investment needs of at least \$300 million. A 2005 needs assessment of SAHA’s physical inventory estimated the costs of deferred maintenance at \$300 million. This estimate did not include the needs at SAHA’s non-profit developments that are also aged and require significant investment. This year, SAHA is conducting a Physical Needs Assessment (PNA) of both its public and non-profit housing inventory and expects that figure to increase significantly. Furthermore, since most of SAHA’s public housing buildings were built prior to the 1970s, these developments have higher energy costs and include deferred investment to energy systems such as heating, boilers, water heaters, etc. The PNA incorporates green building and energy efficiency concepts.

SAHA is working with limited resources to meet the growing need for housing assistance.

The resources that SAHA receives from HUD are not sufficient to properly maintain and redevelop its aging stock of subsidized housing. Further, HUD does not provide sufficient

vouchers to meet the demand and need for them. The country faces a fiscal crisis with significant actual and threatened cuts to federal housing programs resulting in decreasing resources available to SAHA. The proposed federal budget cuts to the Public Housing Operating Fund (including using reserves to balance operating budgets), the Capital Fund and the Section 8 Administrative Fee means that SAHA will have to continue to do more with less.

Currently, the majority of SAHA’s resources (54%) – \$91 million of \$170 million – go out as Housing Assistance Payments (HAP) to over 5,000 private landlords that rent to over 13,400 families with Section 8 vouchers throughout San Antonio. Twenty-one percent (21%) - or \$35 million – goes to cover the salaries and benefits of approximately 600 employees. Of the remaining \$44 million, \$8 million is used to cover the cost of utilities, \$8 million is available for repairs and maintenance, and only \$9 million is available for capital investments. Finally, only 1% of the total budget is available to improve resident access to programs that address their non-housing needs.

Table 5: SAHA FY 2012 Budget – Sources and Uses

<b>Revenues (Sources) by Line of Business</b>	<b>Sources (millions)</b>	<b>Percentage</b>
Section 8 (Housing Assistance Payment & Admin Fee)	\$98.8	58%
Public Housing	\$30.0	18%
Non-Profit Housing	\$22.2	13%
Development Services/Neighborhood Revitalization	\$17.9	11%
Community Development Initiatives	\$1.0	1%
Administrative Support	\$0.3	0%
<b>Total</b>	<b>\$170.2</b>	<b>100%</b>

Budget Line Item by Type of Expense	Expenses (millions)	Percentage
Sec 8 Payments to Private Property Owners	\$91.6	53.8%
Salaries and Benefits	\$35.1	20.6%
Capital Investment	\$9.2	5.4%
Repair and Maintenance	\$7.9	4.6%
Utilities	\$7.8	4.6%
Other Admin/Replacement	\$6.5	3.8%
Debt Service	\$4.3	2.5%
Technology	\$2.5	1.5%
Insurance	\$2.2	1.3%
Consulting Fees	\$1.6	0.9%
Protective Services	\$1.0	0.6%
Resident Services	\$0.5	0.3%
<b>Total</b>	<b>\$170.2</b>	<b>100%</b>

Source: SAHA, January 2012

SAHA faces significant headwinds on the revenue front, with fiscal challenges being faced by and from all major funding sources: federal, state, and resident rent payments. The federal fiscal risks were previously described and reflected in recent reserve recaptures by HUD at SAHA and nationwide. SAHA's residents – who typically pay a percentage of their income to SAHA as rent – face significant employment and income challenges that directly flow to become revenue challenges for SAHA.

Finally, SAHA and its residents also face significant funding challenges at the state level for both housing and non-housing resources. According to the Center for Public Policy Priorities, “the 2011 [Texas] Legislature largely chose to underfund education and health and human services, damaging both our short-term economic recovery and our long-term economic prosperity...”<sup>19</sup> Food insecurity, for example, is one of the most pressing issues facing poor families in San Antonio and, according to the San Antonio Children's Data report 2011, 129,590 (29%) Bexar County children were not sure where their next meal would come from.<sup>20</sup> A recent report by Feeding America found that “more than 118,000 Bexar County children, 26.8 percent, live in food insecure households... [and] [m]ore than one in four Texas children, or 27.1 percent, were at risk of going hungry in 2010.”<sup>21</sup> Yet, in 2011, the Texas State legislature passed a budget that cut spending on social services by 17 percent and made significant school budget cuts that are likely to impact summertime school-nutrition programs.<sup>22</sup>

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<sup>19</sup> Eva De Luna Castro, “Undermining the Texas Economy: The 2012-13 Texas State Budget.”, Center for Public Policy Priorities (CPPP), December 2011.

<sup>20</sup> Voices for Children of San Antonio, “2011 Children's Data Report 2011”, September 2011.

<sup>21</sup> Gary Scharrer and Melissa Fletcher Stoeltje, “1 in 4 children at hunger risk, report says.”, San Antonio Express News, June 5, 2012.

<sup>22</sup> Melissa Fletcher Stoeltje, “Social services situation in Texas still is grim.”, San Antonio Express News, June 16, 2011. “Budget Cuts Jeopardize Summertime School-Lunch Programs, Texas American Federation of Teachers (AFT), May 11, 2012.

Given the population that SAHA serves, and severe cuts at both state and federal level to the safety net for the poor, SAHA must find innovative ways and non-traditional partners to help its residents, including the 28,000 children and youth residents, access resources and opportunities that enhance their ability to become successful and independent.

### *Opportunities*

During the facilitated sessions with the Board and staff, a number of realities were identified that present real opportunities for SAHA.

First, SAHA is an ambitious agency that can currently count on strong city leadership and support on matters related to affordable housing. Second, strong growth in the city's overall and higher income populations create greater opportunities for the development of more mixed-income and mixed use housing.

SAHA also recognizes that meeting the growing housing needs of San Antonio's poorest and most vulnerable will require community-wide action, additional resources and strategic partnerships to address non-housing needs of residents. Therefore, SAHA will seek and leverage opportunities to:

- Be more collaborative and engage with private and non-profit partners that can offer greater opportunities for residents to achieve independence.
- Become a more proactive and effective leader and advocate for affordable housing, not only at the local level, but at the national level as well.
- Create a bold pilot initiative to engage and support the children it serves with the goal of reducing intergenerational dependence on assisted housing.

## **VI. Community Engagement and Feedback**

Community engagement was a critical component of the Plan.Build.Live. process. The definition of who is a stakeholder was approached very broadly, acknowledging that many people and organizations are directly or indirectly impacted by SAHA's work. Special efforts were made to engage SAHA employees at various stages of the process.

Meetings were generally centered on gathering and organizing broad concepts. Initial meetings focused on developing vision elements for the agency; later meetings explored what SAHA needs to do to accomplish stated goals. One question asked throughout the process addressed who the agency could partner with to implement the plan.

This section describes the process and the overarching emerging themes from the various phases of stakeholder and community engagement. For detail, please refer to the public involvement summaries included in the appendices.

### ***Vision and Potential Partners***

The first group of stakeholder meetings was conducted from February 28 to March 21, 2012. These meetings introduced Plan.Build.Live. and had attendees participate in the development of the agency's vision. Meetings were held with employees (nine sessions inviting all departments), residents, Section 8 participants, Section 8 landlords, and representatives from SAHA's Resident Leadership Council. An additional meeting was held during the April Coffee with the CEO meeting. Each group was posed the question, "*What do you want to see in place in 2020, as a result of your/SAHA's actions?*" The Technology of Participation (ToP<sup>®</sup>) facilitation method was utilized to encourage every participant to contribute. The common themes, across the stakeholder groups, for a vision included:

- Better communication within the agency as well as with residents, landlords, the media, and current service partners;
- Improved technology for better communication and response time;
- Increased safety and security for residents;
- Consistent enforcement of rules and regulations; and

- Accountability for actions, good and bad, for all parties.

### *First Community Meeting*

The first Community Meeting, held on March 24<sup>th</sup>, was conducted to continue the dialogue related to the overall vision for SAHA's future. The purpose of the meeting was to solicit the larger community and continue to get input on how the agency could make improvements to better serve their clients. Since the planning horizon for the agency was set to coincide with San Antonio Mayor Julián Castro's SA2020 initiative, the format centered around the correlation and collaboration between the two efforts. Specifically, participants were asked to identify and share their thoughts about how SAHA can contribute to specific SA2020 goals and how attendees/organizations could support SAHA's effort. The public meeting attracted a diverse group of attendees including service agency representatives (PCI, SAMM, Haven for Hope), community leaders, other organization representatives (City of San Antonio, VIA Metropolitan Transit, chambers of commerce, etc.), and residents.

The first portion of the first public meeting was dedicated to raising awareness of SAHA's history and evolution over its 75-year existence, followed by a presentation of the connection between SAHA's current activities and the City's SA2020 effort. The City's SA2020 effort resulted in 11 vision areas being developed as a result of a multitude of citywide meetings and thousands of San Antonians expressing their opinions on what is needed to be a world-class city. Of those 11 Vision Areas, the focus was placed on five areas SAHA considers important to its purpose. The five Vision Areas are 1) Neighborhoods and Growth Management, 2) Downtown Development, 3) Education, 4) Family Well-Being, and 5) Arts and Culture.

The second part of the meeting was formatted as a workshop. Attendees were asked to evaluate the five SA2020 vision areas and associated targets, and provide suggestions about what SAHA could do to support the SA2020 targets. As part of what SAHA could do, and to continue the potential partnering conversation, participants were asked to name who SAHA could partner with to further the vision into reality.

While there were several specific ideas, the overarching themes across the five SA2020 Vision Areas were:

- Developing a structure and support system for promoting and achieving self-sufficiency within a given timeframe;
- Timely, effective, and responsive communication;
- Consistent enforcement;
- Safe, secure, healthy living environments; and
- Creating public and private partnerships to further each of the five areas.

Suggestions for potential partners included the City of San Antonio, Bexar County, VIA Metropolitan Transit, developers, residents, federal grantees (Head Start and others), AVANCE, Precious Minds, Café College, school districts, universities and colleges, banks, churches, HUD, community supported agricultural groups, landlords, arts and education organizations, Master Gardeners, chambers of commerce, business leaders and the private sector.

These themes and suggested partners were presented to the Board of Commissioners for consideration during the April 9, 2012 retreat, where they continued crafting SAHA’s vision, mission, and strategic goals.

### ***Strategic Goals and Action Items***

The April 9<sup>th</sup> Board session resulted in a draft vision, mission, and strategic goals. These items, with specific emphasis on the draft goals, formed the basis for the stakeholder focus groups, conducted from April 24 to May 4, as well as the second public meeting held on May 8, 2012. The purpose of this series of meetings was to gather feedback and collect suggestions on action items to achieve the proposed goals. Each group was asked, “*What innovative, substantial actions could lead SAHA to achieve its goals as proposed here today?*” Stakeholder groups consisted of third-party property managers, residents and members of the Resident Leadership Council, employees, Section 8 landlords, Section 8 tenants, social service partners, community development partners, real estate and development representatives, other public agencies, and SAHA’s Education Investment Foundation members. This series of mini-workshops created hundreds of action items under each of the proposed goals. The exhaustive list was the focus of the second community meeting.



### ***Second Community Meeting***

The second community meeting invited all the participants from the first meeting, as well as others, and especially targeted SAHA residents. Of the 135 attendees, 98 self-identified as SAHA residents and the others represented a diverse spectrum of interests. The meeting included a brief overview of the progress made since the last public meeting to include the draft vision, mission, and strategic goals. Following the presentation, table groups were asked to focus on one of the proposed strategic goals along with the suggested actions from the mini-workshops associated with each. Specifically, groups were asked to evaluate the proposed actions, confirm the actions support the particular goal, and list any new additional actions for consideration during implementation of the plan.

### ***Landlord Symposium***

One final opportunity for feedback presented itself when SAHA hosted a symposium for Section 8 landlords and property managers. A process similar to the Community Meeting was utilized to garner the attendees' feedback on the goals and suggested action steps to support achievement of the proposed goals. The entire list of actions from the stakeholders, the community meeting, and Landlord Symposium can be found as part of the respective meeting summaries in the appendices of this report.

## **VII. Critical Strategic Planning Deliberations**

On January 31, an initial planning session with the Board and executive staff sought consensus on key questions that would impact the development of SAHA's Vision, Mission, and Goals. To establish a common baseline of knowledge about SAHA's history, "SAHA's Transformational Path", a graphic depiction of key milestones in SAHA's history was developed and presented at key meetings. Data was collected and analyzed to explore a few key areas:

- SAHA's recent planning efforts and program improvements;
- the demographic characteristics of the people currently being served by SAHA;
- the growing need for affordable housing (census data and current waiting lists);
- the demographic characteristics of the people waiting for housing assistance;
- the costs of deferred maintenance on SAHA's aging housing stock; and
- the financial resources available to tackle the growing demand for assisted housing.

This information equipped SAHA's leadership to appreciate past and recent accomplishments, and to arrive at a shared understanding of the valuable product and service that SAHA provides - to address the unmet housing needs of the lowest income members of the San Antonio community. It also set the groundwork for the development of a fact-based strategic plan. The Board and executive staff, and later the senior staff, engaged in a discussion about SAHA's role and purpose, its vision for 2020, and key priority areas. Below is a summary of the discussion and general agreements reached during the BOC and senior staff facilitated sessions.

### ***SAHA's Role***

SAHA leadership acknowledged that SAHA is the largest provider of subsidized housing in San Antonio and that it is spread across many business areas and works with many stakeholders. The discussion honed in on three primary areas of business: 1) providing technical assistance to and oversight of private landlords participating in the Section 8 program; 2) managing and maintaining safe and standard units in safe communities; and 3) meeting the unmet and growing need for affordable housing by expanding the effective supply.

There was also consensus around the need for greater innovation to help expand housing supply. Innovative practices should explore all available expansion strategies, including not just the creation of more housing units and faster turnaround of units upon being vacated, but also by enabling faster achievement of self-sufficiency by a greater proportion of families so that residents can effectively “move up and out” -- permitting SAHA to help the next family in need.

Board and staff agreed that to be successful, SAHA must refocus on and continue to transform its core operations, which include:

- Funds Administration (Section 8)
- Property Management (incl. Maintenance and Leasing) of all owned and managed public and non-profit/tax credit partnership units
- Development of mixed-income housing communities

SAHA also has, as a business in support of its core housing operations, the responsibility for promoting and facilitating self-sufficiency for residents of subsidized housing so that their lives are improved and SAHA is able to assist more families in need. To do this, SAHA relies on HUD funding of its Section 8 and public housing Family Self-Sufficiency (FSS) programs to employ caseworkers that are “brokers of service” for a small portion of the residents. However, because less than 1% of SAHA’s \$170 million budget is available for these activities, SAHA recognizes the need to create strategic and sustainable partnerships with educators, employers, and transportation, healthcare and childcare providers, to assist residents with reducing their dependency on assisted housing by improving their lives.

### ***SAHA’s Purpose***

During the facilitated discussion about the main purpose of SAHA’s efforts, the Board and executive staff agreed on the following purposes:

- Enhance people’s lives through the provision of housing assistance in times of need;
- Improve and strengthen its communities and neighborhoods;
- Meet the growing demand for safe, affordable, temporary housing for families, the elderly, disabled, veterans, persons with AIDS, single parents and children.

- Promote family self-sufficiency by facilitating access to services and opportunities (e.g. education, employment, transportation, childcare) through partnerships.
- Become a model where housing serves as an anchor for socio-economic development – with better data collection, analysis and evaluation.

### *SAHA's Vision for 2020*

The discussion then centered on the progress and achievements that SAHA's leadership team would like the agency to be able to achieve by 2020, including:

- Significantly enhance core agency operations with a focus on community revitalization of all SAHA communities;
- Significantly expand its capacity to meet the growing need for housing by increasing the supply of affordable housing units and increasing the turnover/graduation rate of its clients (with a goal of ending multi-generational dependence on subsidized housing in San Antonio);
- Become a national leader in research, design, innovation, and measurement for effective human capital development of low-income individuals; and
- Create and lead strategic partnerships to address the non-housing needs of its residents such as education and training.

Participants also discussed a sincere interest in making sure that SAHA's vision for 2020 complement and align with the SA2020 vision of "growing into a world class city, while holding on to what makes us special."<sup>23</sup> Some expressed interest in supporting the Neighborhoods and Growth Management vision of "cohesive neighborhoods with compelling and unique personalities" and there was some discussion about other areas of the SA2020 vision to which SAHA could contribute, including Education, Family Well-Being, Arts & Culture, and the SA2020 Downtown Development goal of "increasing population growth in center city

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<sup>23</sup> SA2020 Report, page. 7 and 82.

neighborhoods and downtown.”<sup>24</sup> In its April 2012 meeting, the SAHA Board voted to become co-chair for the Neighborhoods and Growth Management component of the SA2020 vision.

### ***Key Priority Areas***

SAHA leaders identified various goals and priority areas/activities that they believe are necessary to confront the challenges summarized above, and to grow the agency’s capacity to meet the growing needs of San Antonio’s poorest and most vulnerable families. They included:

#### Core Current Initiatives/Priority Areas

- CHOICE Neighborhoods – SAHA is lead and partners with schools and employers, including the PROMISE grant recipients led by United Way
- Completion of redevelopment of existing communities that are partially redeveloped including Victoria, San Juan, and Sutton
- Transit Oriented Development Partnerships
- Strengthen Messaging and Public Relations
- Telling the SAHA Story (and connecting it to data)
- Jobs Plus Program
- MTW Goals and Initiatives (example - Section 3)
- Improve Customer Service (Employee Culture)
- Purchasing and Internal Controls
- Transformation of Core Operations (Section 8 and Public Housing)
- Repositioning the non-profit portfolio

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<sup>24</sup> SA2020, p. 41.

## New Initiatives/Ideas

- Leveraging key assets and areas of competence (e.g., owned land/properties, Section 8 funds administration) to diversify and expand funding sources
- Transition select properties to new housing models to ensure long-term property viability and sustainability and to preserve affordability. Some options include:
  - converting public housing to other forms of subsidy such as project based which have more stable funding;
  - employing third-party management companies to improve performance of mixed-income properties,
  - adopting energy efficiency goals in retrofits and exploring energy performance contracts; and
  - mortgage financing to leverage the value of public housing assets.
- More effective partnerships with employers for training that links and leads directly to resident employment opportunities
- Understand crime and safety in SAHA's communities relative to San Antonio as a whole and address safety issues.
- Bold initiative to engage and support youth under 20 – education and public relations
- Improved data collection, analysis and application.

## Reducing investments in other areas

In order to implement new activities or initiatives, SAHA will need to make tough choices about where to invest its limited resources and where to work by expanding partnerships with others. In examining SAHA's role and priorities, participants agreed that deciding what not to do can be as important as deciding what to do. Below is a preliminary list of activities that the Board and staff suggested SAHA should evaluate for possible contracting out or leaving for other partners to own:

- Homeownership programs
- Single family development

- Case management
- Ownership of unused depreciating property
- Property management

### *Additional Priorities*

Three additional areas of interest and concern consistently arose in the Board and staff discussions and, therefore, were included in the process of identifying and prioritizing the 3-5 most important strategic goals for the agency.

#### *Improving Organizational Capacity and Customer Service*

- Change the Culture at SAHA – greater leadership and ownership.
- Establish a culture focused on the goal and celebration of self-sufficiency for all individuals and families that have the ability to do so.
- Be more strategic in identifying opportunities and implementing priorities.
- Be more proactive in communicating with customers and stakeholders/partners
- Improve data collection, analysis and evaluation capacity

#### *Becoming a Strong Leader and Partner in San Antonio*

- Support and collaborate with SA2020 vision and goals for the City.
- Prioritize Choice and Promise Neighborhood efforts.
- Create strategic and effective partnerships with schools and employers.
- Strengthen community involvement and leadership by SAHA leadership and staff.

#### *Strengthening its Messaging and Public Relations*

- Better tell the story of the unmet need, and SAHA’s housing and assistance provision.
- Be more proactive in communicating with customers and stakeholders/partners.

### *SAHA's Strategic Goals*

During the planning sessions several recurring themes arose that were relevant to the discussion of strategic goals including:

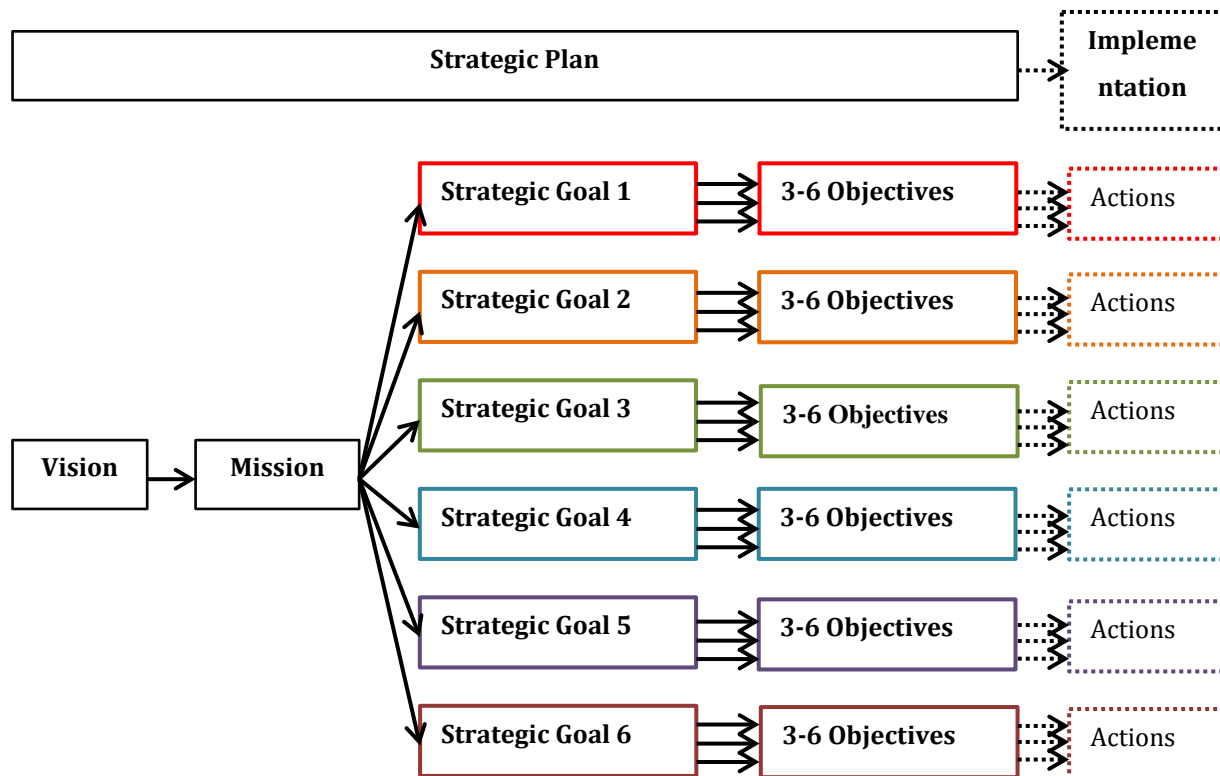
- the commitment to transform the core housing operations and communities of the agency;
- the desire to increase SAHA's capacity and resources to preserve and expand affordable housing opportunities for San Antonio's poorest citizens (recognizing the massive unmet need for housing that is affordable to San Antonio families and households earning below 30 percent of the Area Median Income);
- the need to leverage housing as an anchor for resident socio-economic advancement by creating strategic partnerships to address the significant non-housing needs of its residents; and
- the importance of focusing on 1-2 pilot initiatives that will enable SAHA to demonstrate measurable and replicable outcomes toward self-sufficiency (by collecting, tracking and analyzing data) and to assist more residents with its limited resources.



## VIII. The Final Strategic Planning Framework

By the end of the Plan.Build.Live. process, the Board of Commissioners took the input from the interviews with key leaders and the community engagement process and worked together to reach a consensus on the final framework for the new strategic plan.

That framework is composed of a vision, a mission, six strategic goals, multiple objectives for each strategic goal, and multiple actions for each objective. The strategic plan defines all elements except the actions, which are to be defined during the initial implementation stages, and reviewed annually in conjunction with the budget process. Many actions were suggested by community stakeholders, however, and those are listed in the appendices as recommendations for future consideration.



***Vision: Create dynamic communities where people thrive.***

In reviewing relevant SAHA plans and documents, the following vision articulated by the Board at a retreat in February 2011 was identified -- "...becoming a catalyst for the transformation of communities into safe and healthy environments that support educational and working communities and, ultimately, the transformation of residents' lives."<sup>25</sup> During the second planning session with the Board and executive staff, this language was presented to determine whether it still resonated with participants. Working in groups, the planning session participants developed four vision statements. The following day, the senior staff embraced one of those four -- "Create communities where people thrive!" SAHA's leadership finalized the vision statement after several reiterations and further discussion at the third planning session on May 15<sup>th</sup>.

***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.***

During the second planning session in April, the Board and executive staff reviewed the current mission statement and the discussions that took place at the first planning session regarding the agency's role and purpose. Small groups -- each with a representative from the Board, the staff and the community - then developed new mission statements that were then shared with the senior staff on the following day. SAHA's leadership finalized the mission statement after several reiterations and further discussion at the third planning session on May 15<sup>th</sup>.

***Strategic Goals***

During the first strategic planning session, SAHA leaders identified various priorities and activities that they believe are necessary to confront the challenges facing the agency and to grow SAHA's capacity to meet the growing needs of San Antonio's poorest and most vulnerable families. These priorities fell into six (6) areas and included:

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<sup>25</sup> Summary of Board Retreat, Feb 2011.

- Strengthening and Transforming Core Operations and Communities
- Increasing SAHA's capacity and resources to preserve and expand affordable housing opportunities for San Antonio's poorest citizens
- Leveraging housing as an anchor for resident socio-economic advancement by creating strategic partnerships to address the significant non-housing needs of our residents
- Strengthening Messaging and Public Relations
- Improving Organizational Capacity and Customer Service
- Being a Strong Leader and Partner in San Antonio

In the second and third planning sessions with the Board and executive staff, and the senior staff, these priorities were further developed into **SAHA's most important 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.**

### *Objectives*

Between the second and third facilitated sessions with SAHA's leadership, priority activities and initiatives under these six areas were identified and "Objectives" were suggested under each

goal. The Board, executive and senior staff provided extensive feedback to help finalize the objectives under each goal below.

**GOAL 1: Empower and equip families to improve their quality of life and achieve economic stability.**

Objectives:

- Create an environment and culture of wellness, work, education and community service in all SAHA communities
- Collaborate with partners to expand access to resources that meet the safety, health, education, and employment needs of SAHA residents, with an emphasis on the educational opportunities for children and youth
- Successfully implement, measure, analyze, change, and scale current initiatives or programs that promote economic independence (Specific programs would include: FSS, Jobs Plus, MTW initiatives [Working Household Preference Pilot Program], and Section 3).
- Create new pilots and initiatives that allow SAHA and partners to assess the impact of efforts to reduce intergenerational dependence on assisted housing, including programs that focus on populations under 10 or 20

**GOAL 2: Invest in our greatest resource – our employees – and establish a track record for integrity, accountability, collaboration and strong customer service.**

Objectives:

- Recruit, develop, motivate, retain and recognize high performing employees and leaders in a supportive learning culture that prioritizes staff training and development
- Establish and communicate clear and high accountability standards with strong orientations, mission-driven job descriptions, clear work plans, and performance review criteria that are tied to the agency's mission and goals
- Provide and measure quality customer service with effective and reliable customer surveys
- Build a strong culture of integrity, accountability, and consistent service among board members, employees, residents, and contractors

### **GOAL 3: Preserve and improve existing affordable housing resources and opportunities.**

#### Objectives:

- Develop and implement consistent, integrated, and enhanced efficiency and quality property management standards to ensure that for all SAHA housing exceeds livability and safety standards
- Develop a comprehensive and effective asset management function for maintenance, rehab and redevelopment of SAHA's entire housing portfolio
- Develop a long-term, metric-based decision model for capital project prioritization for the revitalization, redevelopment, or rehabilitation of all SAHA properties
- Improve safety and security in SAHA communities
- Complete the projects identified in the Preservation and Expansion work plan
- Develop and implement a plan for each SAHA community to effectively access health, education, transportation, and employment resources
- Develop a comprehensive and effective construction and rehab planning and management framework
- Maintain and enhance strong relationships between SAHA, Section 8 residents, landlords and neighbors

### **GOAL 4: Strategically expand the supply of affordable housing.**

#### Objectives:

- Design and develop new, sustainable mixed-income communities that address the needs of children, working families, the elderly and the disabled with onsite or nearby childcare services, elderly activities, transportation, employment, education, and healthy living opportunities
- Assess strengths of Choice Neighborhoods revitalization model and apply in other areas when appropriate
- Apply, utilize and maximize available resources, including Section 8, to expand supply of housing affordable for very low income families

- Align development focus and approach with HUD, SA2020 and city-wide strategies and initiatives
- Prioritize transit-oriented development in areas near existing or planned multi-modal infrastructure
- Integrate a mix of uses into new development where and when it is feasible to do so
- Successfully complete major ongoing and planned redevelopment efforts and commitments including Victoria Commons, San Juan Homes, Sutton Homes, Mirasol, and Wheatley
- Strategically evaluate all existing agency land assets, including downtown assets, and develop plan to maximize affordable housing supply while balancing the need for inclusive development and diverse communities
- Collaborate with City, County, and non-profits to end homelessness

**GOAL 5: Transform core operations to be a high performing and financially strong organization.**

Objectives:

- Leverage MTW designation to transform core operations
- Establish and achieve enhanced “high performance” standards for properties, programs, employees and residents/communities based on public and private sector best practices and benchmarks
- Maximize public and private funds and leverage partnerships and core competencies to grow and diversify financial resources
- Invest in technological resources, capacity and training to increase efficiency, provide better data collection, and improve internal and external customer service

**GOAL 6: Develop a local and national reputation for being an effective leader, partner, and advocate for affordable housing and its residents.**

Objectives:

- Increase relationship-building and communication with local stakeholders, including media, to raise awareness about the agency, its work and its contributions to San Antonio

- Strategically educate San Antonio's current and future leaders about SAHA and affordable housing (*e.g., tours and programs like Leadership San Antonio, the Community Leadership Institute, and the Masters Leadership Program of San Antonio and Bexar County.*)
- Co-Chair the Neighborhoods and Growth Management component of the SA2020 Vision and incorporate relevant SA2020 goals and indicators into all key initiatives
- Expand relationships with national, state, and local housing influencers and funders

## **IX. Implementation of the Plan**

### ***A Comprehensive, Living, and Integrated Strategic Plan***

SAHA intends to make this a living strategic plan that will be reviewed and revised every year and synchronized with the agency's annual budget and MTW planning process. SAHA is entering a period of significant financial and economic uncertainty for government funded agencies, and it will be important for SAHA to adapt its strategic plan and goals to changing conditions given its historic reliance on federal funding, primarily from HUD.

In addition, SAHA will synchronize the timing and timeframes for agency strategic goals and priorities with the timing of the MTW Agency Plan, annual Budget plans, and timeframes for departmental and individual employee goal setting.

### ***Financial Analysis of Plan***

As part of the implementation process, SAHA will estimate the financial costs associated with the goals and objectives delineated in the plan. SAHA will need to make tough choices about where to invest its limited resources and look for ways of doing things in partnership with others. Staff will also analyze and discuss with the Board key activities SAHA should consider contracting out or leaving for other partners to do.

### ***Implementation of Plan***

In order to achieve success, the executive staff and senior staff will ensure that the strategic plan cascades down systematically into all divisions and staff working for the agency. The agency-wide plan will be used to guide the development of detailed short (1 year) and medium (2 to 3 year) term departmental work plans and goals, and tied to performance evaluations, and the agency's reward and feedback system. It will be critical that SAHA identify the short-, middle-, and long-term objectives under each goal and establish the indicators it will use to measure success.

### ***Defining and Measuring Success through a Comprehensive Scorecard***

SAHA will develop a comprehensive strategic and operational scorecard to evaluate its progress



against its strategic plan, and to measure its success beyond traditional HUD standards. As SAHA reviews and adjusts its plan on an annual basis, SAHA will also regularly review the benchmarks and timelines in the scorecard.

### ***Assessing and Maximizing Staff Capacity***

Participants in Plan.Build.Live. meetings consistently raised the critical importance of building the capacity of the agency and growing the skill sets of the agency's staff. As Senior Managers develop departmental work plans and annual goals, they must determine whether they have the level and type of skilled resources necessary to achieve success by assessing the capacity and skill sets of their staff. Based on these assessments by divisional and departmental managers, SAHA's Human Resources department should develop an agency-wide Human Capital Strategic Plan which addresses the recruitment, training, development, and performance management needs that will enable and empower staff to meet the goals and expectations established under this plan.

### ***Leadership***

Meeting the growing housing needs of San Antonio's poorest and most vulnerable families will require community-wide action and additional resources. As the largest provider of subsidized housing in San Antonio, SAHA is prepared to become a more proactive and effective leader and advocate for affordable housing resources, not only at the local level, but at the national level as well. Locally, SAHA will demonstrate its leadership by Co-Chairing the Neighborhoods and Growth Management component of the SA2020 Vision and by incorporating relevant SA2020 goals and indicators into all of its key agency initiatives. SAHA is also prepared to convene and lead a consortium of housing stakeholders to address the growing need for affordable housing in San Antonio.

### ***Strategic Partnerships***

SAHA's core mission is affordable housing and its core business includes the administration of Section 8 funds, property management of all owned and managed public and non-profit/tax credit partnership housing, and development of mixed-income housing that is well integrated into the surrounding community. SAHA is not a social services provider, but it recognizes the

importance to take a holistic approach to working with families. Since it has very limited resources for non-housing activities, residents will only be served if SAHA and San Antonio's private, public and non-profit leaders collaborate to offer key resources and opportunities that will enable residents to advance toward and achieve financial independence. SAHA also has an interest in promoting and advancing self-sufficiency among its residents so they may improve their lives and reduce their need for housing assistance, thereby expanding SAHA's effective housing supply and enabling SAHA to help more families in need. Identifying, creating and maintaining strategic and sustainable partnerships with educators, employers, and providers of healthcare, childcare and transportation, therefore, must be a key priority during the early stages of implementation of this plan.

**X. APPENDICES**

APPENDIX A – Plan.Build.Live. Timeline

APPENDIX B - Agendas and PowerPoint Presentations for Board Planning Sessions

APPENDIX C - Presentations and Preliminary Reports for Stakeholder/Community Meetings

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APPENDIX H- Memo on SA2020

APPENDIX I– Selected Statistics

## APPENDIX A: Plan.Build.Live. Timeline

<b>Date</b>	<b>Meeting</b>
January 11, 2012	First SAHA Strategic Planning kick-off meeting with Sr. Staff
<i>January 12, 2012</i>	<i>Regular Board Meeting</i>
January 18, 2012	Sr. Team Work Session with Creative Civilization to create Transformation Path
January 30, 2012	Sr. Staff Meeting: Strategic Planning workshop
<b>January 31, 2012</b>	<b>Board Session 1</b>
<i>February 02, 2012</i>	<i>Regular Board Meeting</i>
<i>February 22, 2012</i>	<i>Special Board Mtg: Communications Plan</i>
February 28, 2012	Employee Meeting 1
February 28, 2012	Employee Meeting 2
February 29, 2012	Employee Meeting 3
February 29, 2012	Employee Meeting 4
March 01, 2012	Employee Meeting 5
March 02, 2012	Employee Meeting 6
March 05, 2012	Employee Meeting 7
March 05, 2012	Employee Meeting 8
March 06, 2012	Employee Meeting 9
<i>March 08, 2012</i>	<i>Regular Board Meeting</i>
March 15, 2012	HCV Participant meeting 1
March 16, 2012	HCV landlord meeting 1
March 19, 2012	HCV Participant meeting 2
March 21, 2012	Resident Leadership Council meeting
March 21, 2012	EIF meeting to introduce Plan.Build.Live.
<b>March 24, 2012</b>	<b>Community Meeting 1</b>
<b>April 09, 2012</b>	<b>Board Session 2</b>
April 10, 2012	Sr. Team session
April 24, 2012	SAHA's Strategic Goals for 2020 -- Property Management Partners
April 24, 2012	SAHA's Strategic Goals for 2020 -- Resident Leadership Council
April 26, 2012	SAHA's Strategic Goals for 2020 -- Six Sigma Meeting
May 01, 2012	SAHA's Strategic Goals for 2020: Section 8 Participants

May 02, 2012	SAHA's Strategic Goals for 2020 -- Service Partners
May 02, 2012	SAHA's Strategic Goals for 2020 -- Community Partners
May 02, 2012	SAHA's Strategic Goals for 2020 -- Real Estate and Development Partners
May 03, 2012	SAHA's Strategic Goals for 2020-- Service Partners for Children
May 03, 2012	SAHA's Strategic Goals for 2020-- Public Agency Partners
May 03, 2012	SAHA's Strategic Goals for 2020 -- Community Partners
May 04, 2012	Activities meeting with Sr. Team
May 04, 2012	SAHA's Strategic Goals for 2020 -- Community Partners
May 04, 2012	SAHA's Strategic Goals for 2020 -- Non-profit partners
<b>May 08, 2012</b>	<b>Community Meeting 2</b>
May 09, 2012	SAHA's Strategic Goals for 2020 – EIF Committee
May 10, 2012	SAHA's Strategic Goals for 2020 – Fair Ave
May 11, 2012	SAHA's Strategic Goals for 2020 – Lincoln Heights
<b>May 15, 2012</b>	<b>Commissioners' half-day Session</b>
May 16, 2012	Sr. Team Session
<i>May 17, 2012</i>	<i>Ops Meeting (w/ presentation by X&amp;A)</i>
May 19, 2012	SA2020 meeting
May 22, 2012	SAHA's Strategic Goals for 2020 – Landlord Symposium
<i>June 25, 2012</i>	<i>Special Board Meeting</i>

**APPENDIX B - Agendas and PowerPoint Presentations for Board Planning Sessions**

**APPENDIX C - Presentations and Preliminary Reports for Stakeholder/Community  
Meetings**

## **APPENDIX D – Transformational Path**



## APPENDIX E - List of Interviewees and Stakeholders

### *Key Leaders Interviewed*

- Mayor Julián Castro (with Frances A. Gonzalez)
- Sheryl Sculley, City Manager
- Judge Nelson Wolff (with Aurora Sanchez)
- Richard Lopez, HUD (with Joe Uviedo)
- City Councilwoman Ivy Taylor
- Pat Frost, Frost Bank (with Donna Normandin)
- Henry Cisneros, City View
- Palmer Moe, The Kronkosky Charitable Foundation (with Tom McGuire)
- Andres Andujar, HemisFair Park Area Redevelopment Corp. (with Omar Gonzalez)
- Darryl Byrd, SA2020
- George Block, Haven for Hope (with Scott Ackerson)
- Toni Van Buren, United Way
- Navarra Williams, SAMMinistries (with Norma Jean Huerta and Dorothy Morris)

***SAHA Program Participants***

	Jose DeHoyos	Abigail Hernandez
	Janet De LaCruz	Olga Hernandez
Caste Adams	Mary Ann De Leon	Clara Herrera
Linda Adams	Anne Diaz	Buddah Honglien
Christina Aviles	Frank Eberhardt	Tamika Horn
Georgia Mae Allen	Mo Edebarh	Dell Ibarra
Daniel Arrellano	Tina Espino	Donald Jones
Susan Baldwin	Rosie Fernandez	Tresia Jones
Clarence Bell	Shonia Flowers	Venus Juarez
Delia Belpé	Adelina Garcia	Sherri LaPlant
Pablo Bueno	Belinda Garcia	Shannon Lipe
Maria Buentello	Elida Garcia	Yanira López
Joe Sebastian Cadiz	Lana Garcia	Aurora Luis
Alex Caldura	Lidia Garcia	Maria Luna
Mary Jane Canales	Leroy Garcia	Paulina A. Luna
Alva Alicia Cardenas	Magdalena Garcia	Agnes Marquez
Juan Carranza	Elva R. Garza	Virginia Marroquin
Veronica Carranza	Lana Garza	Brandy Martin
Alicia Carrera	Anthony Gay	Dora Martinez
Jaime Castillo	Evelyn Gonzalez	Jeanette Martinez
Patricia Cervantes	Timothy Goodge	Virginia Martinez
Charles Clack	Chris Gray	Karen Morris
Ethel Cochran	Freddie Greeno	Emma Muñoz
Celia Cortez	Carlos Guajardo	Linda Najera
Curtis Cross	Frank Guedea	Maria Ochoa
Elnora Cuinikin	Andrea Guerrero	Robert O'Connor
Maria L. Davis	Leticia Guzman	Margo Odoms
	Hilda Hall	Jim Oppelt

Elisa Orosco	Charlotte Trevino	Julian Cano
Carl Michael Pelayo	John Treviño	Fidel Castaneda Gonzalez
Antonio Perez	Angela Torres	Mario Castillo
Matthew Perterson	Minnie Valenciaga	Jennifer Castro
Ida Perez	Barbara Varela	Eli Chavez
Gloria Pleasant	Vinell Vaughn	Jeff Condit
Maria Remedios Quiroz	Ora Velasquez	Alonzo De La Garza
Sherre Shepherd	Herlinda Vines	Reynaldo De La Garza
Sheila Smith-Ramírez	Lynda Walker	Don Dietzmann
Maria E. Ramos	Linda Walton	Joann Dockery
David Riojas	Erma Wilson	Anita Ellis
Tiffany R. Rivera	Beverly Wright	Anna Hernandez
Gloria E. Rocha	Lynnea Wright	Betty Hudspeth
Martha E. Rodriguez	Olga Ybarra	Louis Hudspeth
Olga Rodriguez	Jose Luis Ybarra	Aurora Faircloth
Pat Rodriguez		Theresa Galindo
Gloria Romero		Gloria Gallego
Maria Ruiz	<i>Landlords</i>	Arnold Garcia
San Juana Ruiz	George Alejos	Felix Garcia
Angelita Salinas	Dale Armowood	Patricia Garcia
Martha Sanchez	Cynthia Avendano	Joe Garza
Dora Sepulveda	Rene Baeten	Carrie Girgus
Jaime Serna	Charles Banuelos	Pat Gladswish
Josephine Scholte	Michael Barraza	Jimmy Gonzalez
Glenda Small	Roberto Barrios	Michael Gonzalez
Dione Spiller	Teri Bilby	Jason Gregory
Myrtle Lee Steele	Marcus Bledsoe	Theodore Guidry
Elrland Tanderup	Eduardo Cadena	Peggy Gutierrez

Diedra Hoffman	Refugio Ojeda	Derrick Williams
Melody Huerta	Martha Padier	Brad Wofford
Dell Ibarra	Greg Pape	Joe Zepeda
Thom Jess	Deyna Pena	
Jerry Jin	Albert Perez	<i>Service Partners</i>
Dory Joseph	Teri Perez	Barbara Ankamah
Phil Joseph	Victoria Pompa	Jenny Ayala
Rajendra Khahri	Nina Ramos	David Kruse
Teresa Lao	Charles Ray	Ignacio Leija
Williard Lewis	John Ripley	Sylvia Mendiola
Mike Litofsky	Ben Ross	Kathy Shields
Suzi Linn	Marc Ross	Stephanie Smith
Ana Litosfsky	Mike Rust	
Tanya Lopez	Santiago Sandoval	
Heribeto Madrigal	Sandra Schultz	<i>Partners and Stakeholders</i>
David Manley	Fred Sechusa	David Aldeman
Isabel Manyseng	Mary Ann Sisneros	Valentina Arevalo
Victoria Marisol	Charles P. Steinmetz	Javier A. Argüello
Jerry McClellan	Chris V Stubbs	Ben Brewer
Epifania Menchaca	Miguel Valdez	Christine Drennon
Donna Miller	Nick Valera	Raquel Favela
Barbara Mitchell	Yolanda Valerio	Ray Flores
Lena Miranda	Cheryl Van Dusen	Jose Gonzalez II
Margie Miranda	Kamala Vetr	Elena Guajardo
Diana Montez	Michael Volger	Debra Guerrero
Julia Need	Karl Ward	Jackie Gorman
Delia Neira	Joe Webb	Carry Heimer
Albert Ochoa	Debbie Wiatrek	Norma Jean Huerta

John A. Kenny	Shavano Group	Barrera Iii, Remigio
Scott Kertesz	St. Vincent de Paul	Barretto, Leticia
Paul Mata	Tehota Construction Management	Baum, Paul R.
Dorothy Morris	National Development Council	Bautista, Alberto G.
T.J. Pinales, Jr.	Trinity University	Baxter, Gary T.
Joes Pollack	VIA	Bell, Deborah
Sandy Perez		Bell, Shirra L.
Steve Popoon		Bernal Jr, Jesse
Shanna Salazar	<b><i>Employees</i></b>	Bode, Charles R.
	Adams, Vickie L	Bowen, Madlyn J.
	Aguilar, Sylvia	Buentello Jr., Rene A.
<b><i>Organizations</i></b>	Aguillard, Carol Ann	Bunkley Iii, Bennie L.
A-Plus Family Care	Aguirre, Elvia V	Campos, San Juanita B.
American G.I. Forum	Akinola, Adekunle O.	Canales, Deborah J.
Build San Antonio Green	Alduende Villa, Luis G.	Canales, Javier
City of San Antonio	Aleman, Deborah A	Canales, Mauricio A.
Congressman Charles Gonzalez	Alicea, Teofilo	Carrillo, Guadalupe A
Downtown Alliance	Almaguer Jr, Esequiel	Carrillo, Richard G.
Dress for Success	Alonzo, Leo J	Carter, Alan R.
Homespring Realty Partners	Alvarado, Alma L.	Casso, David
Jacobs Engineering	Anderson, Christopher	Castaneda, Jose R.
Metropolitan Health District	Avila, Gerald T.	Castorena, Roman
NRP Group	Avila, Jason A.	Charo, Rosie M
Project Quest	Badillo, Pamela	Chavez Jr., Eloi
SAMM Ministries	Balderas, Ramon	Christian, Calvin C.
San Antonio Growth for the Eastside	Balderrama, Jesse	Clapp, Millie C.
S.A. Housing Trust	Ballesteros, Estrellita D.	Copa-Wiggins, Ximena
S.A. Food Bank	Barnes, Zarita	Crawford, Angela R.

Cruz, Luis J.	Garcia, Yvonne L.	Hernandez, Rosa A.
Cullins, Travis S.	Garibay, Loretta A.	Hill, Joseph E.
Cypert, Teri L.	Garza Jr., Manuel	Huerta, David
Davila, Elia	Garza, Bianca M.	Hunter, Hannelore A
Davis, Maria T.	Garza, Jesse R.	Ibarra, Carmen G.
De La Garza, Herminia	Garza, Melissa A.	Itzep, Marvin R.
Dyer, Joe	Garza, Oscar H	Jackson, Amanda S.
Earnest, Patricia D.	Gomez, Joann G.	Johnson, Cynthia E.
Eke, Jeanette K.	Gonsalves, Ronald A.	Johnson, Eleanor E.
Ellis-Rodriguez, Marilyn F.	Gonzales Jr., Gable P.	Jorge, Jose A.
Enderle, Joseph	Gonzales Jr., Gerald C.	Juarez, Armando
Espada, Roland	Gonzales, Alexander A.	Kitts, Maria N.
Espinosa, Mario A.	Gonzalez Jr., Frank E.	Leal, Viola Y
Estrada, Rose	Gonzalez, Amelia E.	Longoria, Aiyana J.
Finch, Michaelle M.	Gonzalez, Angela L.	Longoria, Laura L.
Flores, Jeannette A.	Gonzalez, Martha A.	Lopez, Consuelo
Flores, Mary Jane M.	Guerra, Diane G	Lopez, Gladis Y.
Floyd, Darryl E.	Guerra, Ernestina V.	Lopez, Graciela M.
Frane, Hjalmark M.	Gunnels, Rose M.	Lopez, Juanita M.
Fuller, Michaela	Gutierrez, Darlene	Lopez, Sandra G.
Gallegos, Leticia P.	Hardeman, Janice M.	Lott, Elton T.
Gallegos, Sylvia M.	Harris, Yvonne P.	Lucero, Esther M.
Galvan Jr., Fernando G.	Havrda, Lora L.	Lucio, Megan A.
Garcia Zepeda, Angela	Heiser, Maryann F	Maciel, Sylvia
Garcia, Celina D.	Hernandez, Denise M.	Maldonado, Jacqueline
Garcia, Genevieve M.	Hernandez, Maria C.	Maldonado, Ramiro
Garcia, Julia	Hernandez, Maria Isabel	Mancillas, Jose A
Garcia, Karissa R.	Hernandez, Melissa G.	Manibog, Sonia V.

Martinez, Daniel B.	Perez, Brandee R.	Sanchez, Ruben C
Martinez, Hector F	Perez, Jorge L	Sanchez, Shannon A.
Mcclendon Johnson, Angela	Perez, Loretta	Sanchez, Veronica M.
Mcdermott, Michelle	Perez, Marissa A.	Sauceda, Linda A.
Mckinney, Fannie A.	Pesina, Anthony	Sauceda, Yadira
Meadows, Sheila W.	Pina, Eric E.	Saucedo, Joanne
Medina Iii, Ricardo	Ramirez, Katherine C	Scott, Michelle Bright
Medrano, San Juanita	Ramirez, Marcial	Semo, Sarah J.
Melchor, Veronica	Ramirez, Roberto J.	Serna, Oralia
Mendez, Lori	Ramos, Joe W.	Shaffer, Catherine S.
Mendez, Luisa	Ramos-Sossaman, Susan	Sharum, Melvin G.
Mendoza, Juan J.	Reyes, Julie	Shelton, Tory R
Mikeska, Arthur	Richardson, Arleen	Sheppard, Nancy
Mireles, Jennifer	Riojas, Elizabeth	Shows, Alexander M.
Mitchell, Kenneth B.	Robles, Lorraine R.	Simms, Margie L
Modliszewski, Charles	Robles, Renee G.	Sladek, Aaron
Montana, Crystal L.	Rodriguez, Griselda	Smith, Gerald A
Morales, Jose M.	Rodriguez, Stephanie R.	Soliz, Griselda R.
Moralez, Melissa	Romero, Susan E.	Soliz, Kristy M.
Moreno, Roberto	Saenz, Diana A.	Sotelo Jr., Max
Mueller, Dolores A.	Salazar, Brenda	Soto, Laura D.
Ndrevataj, Gerti	Salazar, Priscilla A.	Stewart, Mary L.
Ochoa, Valerie O.	Salazar, Yolanda	Strempeke, Thomas A.
Oliva, Lucas T.	Saldivar, Yvette S.	Suarez, Samantha P.
Olivares, Enrique	Samano, Delfino B.	Swayne, Aura L.
Orona, Zena	Sampayo, Gloria	Tabar, Joel D.
Ortiz, Javier C	Sampson, Martha S.	Taylor, Barbara A
Pena, Rachel	Samuel, Prasad T.	Taylor, Olicea

Thompson, Larry	Vazquez-Cruz, Felix
Torres Iii, Carlos R.	Velasquez, Mynor E.
Torres, Benny	Veliz, Martha
Tran, Minhphuong L.	Ventress, Faticha B.
Trevino, Graciela	Villalobos, Melanie K.
Trevino, Sandra G	Waggoner, Bobby J
Triana, Margaret S.	Walker, Linda Y.
Trujillo, Laura I.	Washington, Paulette
Turner, Ethel L	Weggener, Tomoko A.
Umblance, Gail Y.	Wong, Carolina M
Valdez Jr., Antonio	Woodard, Zachariah J.
Valles Jr., Ignacio R.	Woodsevans, Evelyn F.
Vargas, Jose R.	Wright, Darius
Vasquez, Albert	Zatarain-Flournoy, Josefa H.



## **APPENDIX F - Executive Summary of Interviews with Leaders**

## **APPENDIX G - Memo on Shared Goals and Objectives with Local Partners**

HausAngeles reviewed recent plans developed by local partners to identify areas of common interest, capture potential synergies, and identify opportunities for new and/or expanded partnerships with the following stakeholders:

- Centro Partnership – “Strategic Framework Plan for the Center City”, December 2011
- VIA – “2035 Long Range Comprehensive Transportation Plan”, July 2011
- City of San Antonio – “San Antonio Comprehensive Master Plan Framework: Shaping the Future of San Antonio”, November 2010 & “Five Year Consolidated Plan, COSA FY 2011-2015”, August 2010
- San Antonio Public Library, “The Next Chapter: 21<sup>st</sup> Century Strategies for the San Antonio Public Library”, Strategic Plan for 2011-2016

Below is a summary of key components of partners’ plans that SAHA should consider as it moves toward implementation of its strategic plan.

### Centro Partnership’s Downtown Strategic Framework Plan

The Board of Centro Partnership adopted its Downtown Strategic Framework Plan on February 23, 2012. That Framework Plan called for the creation of “7,500 new housing units through 2020 targeted to residents at 80-120% of the area median income (AMI) in the following “primary growth areas” areas: Downtown Core, Midtown/River North, Chavez/ Hemisfair Corridor, Near River South. It also identified the “longer term growth” areas: Medical District, Civic Core, Near East Side, Near West Side (Multimodal / UTSA) and recommends supporting the proposed fixed rail and streetcar alignments that would connect targeted growth areas.

An implementation plan for this work has been developed and, on June 21, 2012, San Antonio’s Center City Development Office will seek the City Council’s approval of an ordinance to adopt the *Center City Implementation Plan and Housing Incentive Policy*. The ordinance will

authorize “authorize the execution of Chapter 380 Economic Development Program Loan and Grant Agreements in accordance with the terms and conditions of the Policy.”<sup>26</sup> The proposed Center City Housing Incentive Policy (CCHIP) encourages mixed-income development and could be an important vehicle for SAHA to strategically expand the supply of affordable rental housing in a mixed income environment within the Inner City Reinvestment Policy Target Area. HausAngeles recommends that SAHA work closely with Centro Partnership, the City and the Mayor to ensure that new housing development, particularly in the downtown area, is inclusive of San Antonians at all income levels.

#### VIA’s Long Range Comprehensive Transportation Plan (LRCTP)

VIA’s LRCTP focuses on Transit Oriented Development (TOD) and higher density developments that allow for a greater concentration of residents and activities and increase ridership and efficiency.<sup>27</sup> As SAHA works to strategically expanding affordable housing, it should consider aligning its plan with VIA’s plans for transportation investments. For example, SAHA should review and find ways to leverage the *Express Bus Corridors* route recommendations to ensure that SAHA residents can access these routes and improve their ability to find and retain employment.

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<sup>26</sup> City of San Antonio Request for Council Action, Agenda Item #47 (RFCA Tracking No: R-9215), June 21, 2012. <https://webapps1.sanantonio.gov/agendabuilder/RFCAMemo.aspx?RIId=9215>

<sup>27</sup> VIA, “2035 Long Range Comprehensive Transportation Plan”, July 2011, p. 13

In addition, SAHA should keep the following VIA plans/priorities in mind as it moves to preserve and/or expand its affordable housing portfolio:

- *Bus Rapid Transit (BRT), “Via Primo” Corridors (2015)* – The Northwest/Fredericksburg corridor “will provide the connection between the largest employment centers of the city, downtown central business district and the South Texas Medical Center”, including the Westside Multimodal Transit Center;<sup>28</sup>
- *Downtown Circulator Corridors (2020)* – The East-West and North-South corridors would be served by modern streetcars, and enhance transportation to and through the downtown area of San Antonio.
- *Rail Corridors (2025)* - East/West and North/South to serves the densest areas of employment and residences in San Antonio.

Finally, as SAHA works to empower and equip families to achieve economic stability and independence, the agency should consider collaborating with VIA and other funding partners to investigate whether VIA’s Vanpool Services can be made accessible and affordable to SAHA residents. According to VIA’s plan, “VIA Vanpool Services provide commuters an option to share daily trips to work with coworkers. The vanpool program serves those who commute up to 100 miles one way, either from, to, or entirely within VIA’s traditional bus service area. The service allows for groups of individuals to share the cost of travel and to develop a customized commuter service.”<sup>29</sup> SAHA may also want to promote greater awareness of VIA’s paratransit services, VIAtrans, among its elderly and disabled residents. VIA’s plans include technological improvements that will improve scheduling and service on VIAtrans.

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<sup>28</sup> VIA, p. 23

<sup>29</sup> VIA, p. 33

## City of San Antonio's Comprehensive Master Plan Framework

In January 2010, a Comprehensive Plan Citizens Advisory Committee reviewed and updated the City's 1997 Master Plan Policies. The Committee identified six areas of focus with goals, subgoals and policies for each. The first goal and accompanying policy under the Livability/Quality of Life component of the Master Plan Framework is consistent with, and supportive of, SAHA's goals for strategically expanding affordable housing and preserving and improving existing affordable housing.

Goal 4.A. - Quality affordable housing is available to meet the demand of the community.

Policy 4.A.1 - Existing housing, particularly in older neighborhoods, is preserved and revitalized

Policy 4.A.2 - Housing affordability is measured by the cost of housing plus transportation and utilities.<sup>30</sup>

SAHA should work more closely with the City to meet the unmet and growing demand for affordable housing in San Antonio.

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<sup>30</sup> City of San Antonio, Comprehensive Master Plan Framework: Shaping the Future of San Antonio, p. 10

## San Antonio Public Library

The San Antonio Public Library (SAPL) Strategic Plan for 2011-2016 aligns with the SA 2020 Vision and identifies six (6) focus areas. Three following three (3) areas are quite relevant to and supportive of SAHA's commitment to empower and equip families to achieve economic stability and reduce dependency on housing assistance.

### *Support Educational and Learning Opportunities*

As SAHA focuses on reducing intergenerational dependence on housing assistance by increasing opportunities and educational outcomes for the children it serves, SAHA should consider how best to work with SAPL as it “strengthens and expands its role in supporting early literacy education to promote school readiness.” SAHA should partner with SAPL to ensure that children in SAHA programs enjoy the benefits that will result from the development of standards for library programs that serve children, their parents and care providers.<sup>31</sup>

### *Support Workforce and Economic Development*

As SAHA works to promote economic independence among its residents, and to create a culture of work and education throughout its communities, SAHA should collaborate with the SAPL and connect SAHA residents with the following SAPL initiatives:

- Develop and promote a flexible, customizable Jobs and Small Business Center (JSBC) model to complement existing branch assets.
- Adopt new technologies to increase access to resources that address 21st-century literacies (technology, finances, health, English as a Second Language, and adult literacy).

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<sup>31</sup> San Antonio Public Library, The Next Chapter: 21<sup>st</sup> Century Strategies for the San Antonio Public Library, Strategic Plan for 2011-2016, p. 9

- Educate for online readiness, emphasizing basic skills for job searches, applications, resumes, document management, and email.<sup>32</sup>

### *Foster Community Connections*

Finally, as SAHA engages partners to facilitate residents' access to learning/computer centers and libraries (in or near their housing communities), SAHA should partner with SAPL on the following initiatives:

- Customize spaces, services, and collections to meet community needs as defined by ongoing market analysis – such as exploring space sharing with organizations that also serve families, children and teens.
- Anticipate and respond to the evolving needs and expectations of key market segments by focusing on intersections with library users onsite and off-site (example - delivering library service in venues throughout the community or seeking relevant locations to deliver library services to distinct population groups).
- Leverage SAPL's deep reach in the community to build partnerships and collaborations by designating a staff position for outreach, partnership and collaboration management.<sup>33</sup>

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<sup>32</sup> SAPL, p. 33

<sup>33</sup> SAPL, p. 35

## APPENDIX H - Memo on SA2020



**To:** Richard Milk, Melanie Villalobos and Lourdes Castro Ramirez

**From:** Ray Mathoda and Sonia Montero Poyo

**Re:** SAHA's Support of the SA 2020 Plan

**Date:** March 6, 2012

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Thank you for soliciting our thoughts and recommendations on how SAHA can partner and support the goals and activities found in the SA 2020 plan. We agree that it is crucial that SAHA's vision align with SA 2020's vision of Big City, Small Town and "growing into a world class city, while holding on to what makes us special." (p. 5). As the leading housing agency in the City of San Antonio, SAHA should have a well-defined role in this citywide planning process. Specifically, we see that SAHA's work aligning with three areas of SA 2020: Neighborhoods and Growth Management, Downtown Development, and Education. In fact, when we met with Darryl Byrd, he asked if there was anything SAHA could do to support the education goals in the plan.

### **Neighborhoods and Growth Management**

With regard to Neighborhoods and Growth Management, SAHA can certainly demonstrate its support of the vision of "cohesive neighborhoods with compelling and unique personalities" by ensuring that its future development activities are transit and pedestrian-oriented, and include some green space. (p. 82). These principles may already be integrated into SAHA's approach to developing affordable housing, and SAHA can demonstrate the application of these principles to low- and mixed-income communities. It is important to note that this section of the plan does not directly address the great un-met need for affordable housing (primarily for persons at 30% of AMI and below) that impacts SAHA's primary target population. As such, we see SAHA's role with regard to this section of SA 2020 as ensuring a place for low-income people in the vision, rather than taking ownership of the much broader goals embodied in this section, which go beyond SAHA's core focus.

### **Downtown Development**

SA 2020 places a specific emphasis on residential developments inside Loop 410, and specifically the downtown area. One of two key targets in the Downtown Development section of SA 2020 is to "[i]ncrease downtown housing units by 5,000 including mixed income and student housing." (p. 28). SAHA should play a leading role to ensure that future downtown development includes affordable housing. In so doing, SAHA will need to consider any potential conflicts between a focus on downtown development and the agency's existing policy of de-concentration.

### **Education**

The SAHA Board of Commissioners has clearly expressed that they believe SAHA's mission is more than simply providing housing, but to do so in a way that provides economic and educational opportunity to residents of its housing. In light of the large number of youth served by SAHA, the passion that SAHA's leadership has about linking to education and self-sufficiency, the existing linkages between housing and education in the Promise and Choice Neighborhood grants, and the Mayor's early childhood –focused Brainpower Initiative, we see the opportunity for SAHA to play a significant role in supporting SA 2020's education goals of increasing kindergarten readiness and improving 3<sup>rd</sup> grade reading levels. We see a strong alignment of the target population for this aspect of SA 2020 and SAHA's existing resident and waiting list population.

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## **APPENDIX I – Selected Statistics**

### ***Methods***

### ***Data***

In January 2012, SAHA began taking end-of-the month snapshots of the elite live database. Among other data, general demographic data for residents served through Public Housing (PH) and the Housing Choice Voucher (HCV) are being captured. The present report dated June 1, 2012 is the first biannual demographic report produced from this data.

### ***Monthly Snapshots***

Monthly snapshots from January 2012 through April 2012 were used for this report. Because there was minimal variation across variables in each monthly snapshot, an average of all four months was used. An average of monthly snapshots will continue to be the normal reporting method. If future monthly snapshots indicate significant variations in demographics, these will be noted in subsequent reports.

The Housing Choice Voucher program data do not include families who have ported-out or moved out of SAHA jurisdiction. These families include those who have requested to move out of SAHA's jurisdiction and are waiting for the final documentation to process OR have moved out of SAHA's jurisdiction and the receiving public housing agency continues to bill SAHA for the voucher. These families were removed to better reflect currently served population within SAHA jurisdiction and will be analyzed separately.

### ***Tenure***

The length-of-stay or tenure is an important variable to track. Tenure data reported in this report are not an average of monthly snapshots from January to April 2012; rather, they are reported from a single snapshot on May 28, 2012.

Currently, tenure is calculated by using the original date of admission and the monthly snapshot date. The original date of admission is first point in time that a family is admitted into PH or HCV. If a family completely ends housing assistance through SAHA and in a subsequent year re-enters after some lapse of time, the original admission date does not change in the database. It is important to note that all tenure calculations could include any period of time in which a family was not receiving housing assistance through SAHA. This will only occur if the family ended assistance and later began receiving assistance again. It is unclear at this time how often this situation actually occurs.