

DEC 11 2013 *gm*

NHCD / AHFC

**RENTAL HOUSING DEVELOPMENT ASSISTANCE (RHDA)
Application for Rental Development Financing**

PLEASE NOTE: AHFC Reserves the right to fund projects at a lower amount than requested, and the right to deny applications that do not coincide with the City's FY 2012-13 Action Plan goals and policy direction from the Austin City Council.

Project Name: Garden Terrace Phase III

Project Address: 1015 W. William Cannon Drive, Austin, TX 78745

Total # units in project/property: 20 units
Total # units to be assisted with RHDA Funding: 20 units

Project type: Acquisition Rehabilitation New construction Refinance Rent Buy-Down

Amount of funds requested: \$1,200,000 **Terms Requested:** deferred, forgivable loan

Role of applicant in Project (check all that apply): Owner Developer Sponsor

1. Applicant Information (If applicant is not acting as the developer, please provide all of the information below for the developer as well as for the applicant. If the developer involves multiple entities, is a partnership or joint venture, please provide duplicative information for each, and identify the entity that will serve as the "lead" organization).

Foundation Communities, Inc.
Name

3036 S. 1st Street
Street Address

Austin TX, 78704 (512) 610-4025
City **State, Zip** **Telephone #**

Jennifer Hicks (512) 610-4025 jennifer.hicks@foundcom.org
Contact Person **Contact Telephone #** **E-mail address**

[REDACTED]
Federal Tax ID Number or SS#

The applicant/developer certifies that the data included in this application and the exhibits attached hereto are true and correct. Unsigned/undated submissions will not be considered.

Foundation Communities, Inc.
Legal Name of Developer/Entity

Walter Moore
Signature of Authorized Officer

12-11-13
Date

Executive Director
Title

Scanned 12/11/13

2. **A. Non-profit applicants/developers, attached copies of the following:**

1. A "certificate of status" issued by the Texas Secretary of State. - **ATTACHMENT 1**
2. Federal IRS certification granting non-profit tax-exempt status. - **ATTACHMENT 2**
3. Certified financial audit for most recent year which include the auditor's opinion and management letters. - **ATTACHMENT 3**
4. Board resolution approving the proposed project and authorizing the request for funding - **ATTACHMENT 4**

3. **Project Type (Please check any that apply.)** This project is considered:

Traditional Rental Housing (serving low-income households, and resident services may or may not be provided)

Transitional Housing (case management services provided and residency limited to a certain length of time, usually no more than 24 months)

Permanent Supportive Housing (Considered long-term rental housing for very low-income families and individuals who are among the hardest to serve and who are most vulnerable to homelessness. This type of housing provides case management services to residents as needed).

If you checked Permanent Supportive Housing, please complete the information below.

A. Types of proposed PSH Units: Multi-family Single-family

B. Numbers of proposed PSH Units:

20 Total Number of Units in project

20 Total Number of RHDA-assisted Units Proposed (include PSH units and non-PSH units)

4 Total Number of Permanent Supportive Housing (PSH) Units Proposed

C. Check the population or sub-population(s) proposed to be served and indicate the number of units dedicated to that population or sub-population.

Individuals or families headed by individuals that are:

1. **Chronically homeless** as established in the HEARTH Act (Homeless Emergency and Rapid Transition to Housing Act of 2009) found at 24 CFR Part 577.

NUMBER OF UNITS 4

2. Households that would otherwise meet the HUD definition of chronically homeless per the HEARTH Act, but **have been in an institution for over 90 days**, including a jail, prison, substance abuse facility, mental health treatment facility, hospital or other similar facility.

NUMBER OF UNITS _____

3. Unaccompanied youth or families with children **defined as homeless under other federal statutes** who:

a. have experienced a long-term period without living independently in permanent housing;

b. have experienced persistent instability as measured by frequent moves over such period; and

c. can be expected to continue in such status for an extended period of time because of chronic disabilities, chronic physical health or mental health conditions, substance addiction, histories of domestic violence or childhood abuse, the presence of a child or youth with a disability, or multiple barriers to employment.

NUMBER OF UNITS _____

4. A single adult or household led by an adult **'aging out' of state custody of the foster care or juvenile probation system**, where the head of household is homeless or at-risk of homelessness.

NUMBER OF UNITS _____

5. _____ Any other population **not defined above** but who would otherwise be eligible for or need permanent supportive housing services.
NUMBER OF UNITS _____

NOTE: APPLICANTS CHECKING C.1, C.2, C.3, or C.4 ABOVE MUST COLLECT AND REPORT INFORMATION INTO THE HOMELESS MANAGEMENT INFORMATION SERVICE (HMIS)

4. Project Description. Provide a brief project description that addresses items "A" through "L" below.

a. Describe the tenant population, income levels, and services, if any, to be provided to or made available to residents.

Foundation Communities, Inc. (FC) is applying to the Austin Housing Finance Corporation for \$1,200,000 in Rental Housing Development Assistance for the new construction of 20 efficiency apartments, common area spaces and supportive staff offices as a Phase III to Garden Terrace, an existing 103-unit supportive housing community. Garden Terrace, Austin's first SRO, has been providing permanent, affordable housing in a supportive environment for homeless and extremely low-income single adults since August 2003. Garden Terrace Phase II, completed in 2008, involved the renovation of approximately 4,400 square foot of unused vacant space within the building footprint into 15 additional SRO units. Garden Terrace Phase III will be newly constructed on underutilized land and connected to Phases I and II via the eastern exit of the building.

The construction of Garden Terrace Phase III is a relatively easy way for Foundation Communities and the City of Austin to partner to bring 20 units of supportive housing online quickly and at a low long-term cost. An affiliate of Foundation Communities, Garden Terrace Housing Corporation, already owns the land, so the total development cost is low as compared to a project that has to factor in the price of land. Garden Terrace Phase III will be adding 20 units to the existing Phase I and Phase II for a total of 123 units. This is a similar unit count to our other supportive housing communities and therefore will have minimal impact on overall operating costs because no additional staff are needed to accommodate the 20 units. Finally, there is very low turnover at Garden Terrace with a full waiting list, so the 20 additional units will fill instantaneously once construction is complete. Garden Terrace Phase III is feasible and desirable from a market, financial, architectural, and mission perspective.

Proposed Residents and Rents – All 20 units will be available for very low income and homeless single adults. All units will serve individuals 50% or below MFI. The reality is that most residents will have incomes below 30% MFI.

Twenty percent of the units (4 units) will be targeted to chronically homeless as established by the HEARTH act. The remaining 16 units will be targeted to a mix of populations including: individuals on a fixed income (elderly and/or persons with disabilities), homeless persons and persons on the verge of homelessness.

Supportive services will be made available to all residents at Garden Terrace Phase III. The new units will be added to the supportive service program already in place at Garden Terrace Phases I and II. The goal of the supportive services at Garden Terrace is to promote stable housing through programs that increase access to health assistance, promote increased and stable income, and provide services that support self-development. The menu of supportive services at our permanent supportive housing properties typically include:

- Case management
- Adult education classes
- Money management classes
- Information and referral to community services
- Home health assistant
- Education savings program
- Free tax preparation
- Financial stability programs
- 24-hour computer lab
- Monthly food pantry
- Welcome Home Baskets

Please see Section 15(a) for a more detailed explanation of services to be provided at Garden Terrace Phase III.

b. Include the type of structure (multi-family or single-family), number and size of units in square feet.

Garden Terrace Phase III will be a 20-unit single room occupancy supportive housing rental community for individuals. Phase III will be a two-story structure that will be connected to the main Garden Terrace building on its easternmost side. Each 400 square foot efficiency unit will contain a kitchenette and bathroom. Common spaces for resident use will include a lounge and community kitchen. There will also be an additional supportive service staff office constructed.

The unit mix for the property is as follows:

Unit Type	# of Units	Square Footage
0 bedroom/0 bath	20	<u>400 sq. ft.</u>
		8,000 sq. ft. (rentable square feet)
		2,540 sq. ft. (common area spaces)
TOTAL		10,540 sq. ft.

- c. **Occupation:** Garden Terrace Phase III is new construction and therefore is not occupied.
- d. **VMU, TOD, PUD:** Garden Terrace Phase III is not located in VMU, TOD or PUD.
- e. **Preservation:** Garden Terrace Phase III is new construction and therefore will be adding 20 new units to Austin's affordable housing stock.
- f. **Existing Structure:** Garden Terrace Phase III is new construction, but will be connecting to the existing Garden Terrace building via a newly constructed hallway. The original Garden Terrace building was first constructed as a nursing home in 1975 and then renovated into Garden Terrace in 2003. A second phase of 15 units was built out of vacant space in the existing building in 2008.
- g. **Section 8:** Garden Terrace Phase III will not be reserving units for Section 8 voucher holders. Instead, vouchers will be accepted at the property.
- h. **Indicate the number of units that are or will be made accessible and adaptable for persons with mobility, sight or hearing disabilities.**

Garden Terrace Phase III will have 8 units that will be made accessible for persons with mobility, sight and/or hearing disabilities.

i. Demonstrate the Project's compatibility with current Neighborhood Plan (if applicable).

Garden Terrace is located in the Far South Austin Community Association. We made contact with Betty Edgemond, the main contact for the association, and she had no opposition to the project or the required zoning change. This section of far South Austin has not begun the neighborhood planning process.

j. Summarize the key financials of the project, clearly indicating the total project cost, the amount and intended use of AHFC funds being requested, and the amount(s) and provider(s) of other funding and the stage of those funding commitments.

The total cost to construct the 20-unit Garden Terrace Phase III is \$1,550,000. The sources of funds for this project include:

City of Austin, in the total amount of \$1,200,000. These funds will be used to pay for hard and/or soft costs. Since this project is serving a population that can only afford to pay a minimal amount in monthly rent, the project will only be feasible if there is no debt service to repay. We request these funds from the City to be in the form of a deferred forgivable loan.

Federal Home Loan Bank of Atlanta in the amount of \$350,000. An application for funding with the FHLB Atlanta Affordable Housing Program is due on February 13, 2014. In the meantime, Foundation

Communities, Inc. will commit \$350,000 in reserve funds to bridge the award of the AHP funds and to keep the project moving. The FC bridge loan will be zero percent interest with no payments due. In the event a FHLB Atlanta grant is not awarded, an application will be submitted with the FHLB Dallas. Foundation Communities has a strong track record of securing FHLB grant awards with 8 past awards. Once a FHLB award is made and funds are drawn, FC will pay off the bridge loan with the AHP funds. The FHLB AHP funds will be a grant and therefore will not have any interest or principal payments due.

Please attach the following to the description of the above items:

- k. A map (8 1/2" x 11") indicating the property location and the distance to the nearest Capital Metro Transit Stop to which residents will have access.**

Please see **ATTACHMENT 5** for a map of the property location and distance to nearest Capital Metro Transit Stop.

- i. Locate on the "Opportunity Map of Austin" the census tract in which the property lies. The map is attached to the Program Guidelines.**

Garden Terrace Phase III is located in a LOW opportunity census tract on the "Opportunity Map of Austin." Please see **ATTACHMENT 6** for a copy of the map and opportunity designation. The location of Garden Terrace is optimal for supportive housing. There is a bus stop right at the properties line and dozens of amenities within walking distance. The achievement level of schools are not a determining factor for supportive housing.

5. Site Control and Demonstration of Value

Garden Terrace Housing Corporation, a non-profit affiliate of Foundation Communities, has owned the project site that will contain Phase III since February 2002. Please find attached **ATTACHMENT 7: Warranty Deed** and **ATTACHMENT 8: Current Tax Documentation**.

6. Zoning

In order to build the 20 units for Garden Terrace Phase III, the existing conditional overlay on the zoning had to be modified. The 20 units were within the parameters of the MF-2 zoning; however, the following changes had to be made to the conditional overlay: 1) modify the 22 foot height limit to a 35 foot /2 story limit; 2) remove the FAR limit; 3) modify the maximum number of dwelling units from 103 to 123; and 4) modify the corresponding number of dwelling units per acre from 17.85 to 21.32. The zoning change was approved by Austin City Council on all three readings on August 29, 2013. A copy of the ordinance is attached as **ATTACHMENT 9**.

- 7. S.M.A.R.T. Housing™.** Please find attached a letter that indicates Garden Terrace Phase III has been reviewed and meets S.M.A.R.T. Housing requirements. Please see **ATTACHMENT 10**.

- 8. Development Team and Capacity.** Identify below the persons or entities anticipated to be involved in the project, such as lenders, attorneys, accountants, architects, engineers, general contractor, sub-contractors, property managers and consultants. Also, indicate if any person or entity involved is certified by the City of Austin as a minority or women-owned business enterprise (**MBE/WBE**), or if any of the entities are also **non-profit** organizations.

	Name and Contact Information	MBE? (Mark X if Yes)	WBE? (Mark X if Yes)	Non- profit? (Mark X if Yes)
Owner	Garden Terrace Housing Corporation, 3036 S. 1 st St., Austin, TX 78704			X
Developer	Foundation Communities, Inc., 3036 S. 1 st Street, Austin, TX 78704			X
Architect	Michael Gatto, Austin Community Design and Development Center, 2108 E. M. Franklin Ave., Austin, TX 78723			X

Engineer – MEP and Structural	Encotech Engineering, 8500 Bluffstone Cove, #B-103, Austin, TX 78759	X		
Construction Lender	N/A			
Other Lenders	N/A			
Attorney	A. Rick Hightower, 5901 Old Fredericksburg Road A-103, Austin, TX 78749			
Accountant	Ann Clift, CFO, Foundation Communities, Inc., 3036 S. 1 st Street, Austin, TX 78704			X
General Contractor	TBD			
Consultant (if Applicable)	N/A			
Property Management Provider	Foundation Communities, Inc., 3036 S. 1 st Street, Austin, TX 78704			X
Other: Civil Engineer	Civiltude, 5121 Bee Caves Road, Ste. 105A, Austin, TX 78746	X		

Foundation Communities has 20 years of experience contracting for and overseeing the construction and rehabilitation of affordable housing. As the owner and manager of 14 affordable housing properties (1,982 units) in Austin and 3 affordable housing properties (691 units) in North Texas, Foundation Communities has built a strong development team and has worked together on many projects. Three of our communities were new construction projects financed with tax credits. Fourteen of our communities were purchased as existing properties and rehabilitated. Each has greatly improved with renovations, green spaces and playscapes, learning centers, landscaping, signage, lighting and green building features (solar panels and rain water harvesting). Four properties are single room occupancy permanent supportive housing, two properties are duplexes and the remaining 11 properties are multifamily properties. We have an additional 135 units of permanent supportive housing that will finish construction in September 2014 and 140 units of family rental housing that will complete in July 2015.

Housing Development Team - Our Housing Development Team consists of the following FC staff (Please see **ATTACHMENT 11** for resumes):

Walter Moreau is FC’s Executive Director. During his 20-year career, Moreau has secured subsidy financing of more than \$100 million to create more than 2,800 units of service-enriched, nonprofit-owned affordable housing. Moreau was recognized as a 2007 James A. Johnson Community Fellow by the Fannie Mae Foundation. He was also awarded the 2005 Social Entrepreneur of the Year Award and the 2004 Texas Houser Award. He holds a Master’s degree from UT’s LBJ School of Public Affairs. He has been with Foundation Communities for more than 17 years.

Sunshine Mathon, Design and Development Director, assists in the programming, design and construction management of all development projects. He has a focus on green building and sustainability issues, such as energy and water conservation, use of recycled content materials and indoor environmental quality.

Vicki McDonald, Asset Manager, oversees the income and assets of the FC portfolio. She has over 30 years of experience in owning and managing multifamily, office and retail developments. For the past 25 years, she has owned and operated Vista Properties, a real estate firm specializing in the management, leasing and brokerage of income producing assets.

Jennifer Hicks, Director of Housing Finance, pursues new development opportunities and identifies and applies for subsidy and conventional financing for multi-family housing. Jennifer has 12 years of housing development experience.

Garden Terrace Phase III, as a new construction SRO, will draw on experiences from the recently to be completed new construction of Capital Studios and the completion of four SRO housing communities – Garden Terrace, Spring Terrace, Skyline Terrace and Arbor Terrace. Please see **ATTACHMENT 12** for a description of these projects.

Please also provide narrative information about the skills you or your development team members have in the following areas:

- a. **project management:** Sunshine Mathon was the Project Manager of M Station and Arbor Terrace, as well as for Capital Studios (now underway.) Sunshine coordinates the RFQ and bid process for architect, engineer and general contractor. He is also acts as the direct link between the third party design and construction professionals and FC’s development team. Jennifer Hicks has packaged the financing for all developments by Foundation Communities the last 10 years. The packaging includes running project proformas, applying for the funding, bidding out equity/mortgages, coordinating closings, and ensuring compliance with construction-related funding provisions. Jennifer also coordinates due diligence reports such as the Phase I ESA, appraisal, market studies, property condition reports, and surveys.
- b. **market analysis:** Foundation Communities typically engages a third party firm to conduct market studies for each of our proposed projects. The market study is ordered in the contract feasibility period. Jennifer Hicks receives bids and engages each project’s market analyst.
- c. **site selection and control:** Walter Moreau has 20 years of site selection experience. Sites are selected based on a variety of factors including current funding priorities, availability of low-cost land, preservation of affordable housing opportunities and availability of sites in close proximity to existing FC properties. Vicki McDonald is a licensed real estate broker and is involved in all real estate contract negotiations. Jennifer Hicks works with the title company to ensure all requirements are met on the buyer side and oversees the closing on behalf of Foundation Communities.
- d. **planning and construction:** Sunshine Mathon has structured the professional development team and overseen the planning and construction for FC’s last three projects. Foundation Communities contracts with third-party General Contractors. FC has had the privilege of working with a number of quality general contractors and invites those firms to bid on all projects developed by Foundation Communities (in addition, to other firms who might be interested.)
- e. **design, architecture and engineering:** Sunshine Mathon also oversees the hiring of the design and engineering team. Typically, Sunshine issues an RFQ to an invited list of bidders (open to all interested parties.) The list is narrowed down based on responses and then the FC development team including Walter, Vicki, Jennifer and Sunshine meet the finalists and make a selection based on presentations.
- f. **legal and accounting:** Rick Hightower has been the general counsel for Foundation Communities for the past 15+ years and handles most real estate transactions. Foundation Communities has historically worked with Kutak Rock as a tax credit counsel on LIHTC projects. All accounting is performed in-house by an accounting team led by Ann Clift, CFO. Tax returns, audits and cost certifications for tax credit properties are contracted out to Novogradac and Company, LLC.
- g. **federal funding rules:** Foundation Communities has extensive experience working with programs funded by HUD and their associated federal regulations including: Federal Labor Standards, Davis Bacon Reporting, Section 3, Affirmative Marketing, Environmental Clearances, Public Notices and Procurement Standards. Please see **ATTACHMENT 13** for a list of properties and the federal funding programs in place at each property.
- h. **other funding source rules (e.g. Low Income Housing Tax Credits):**Our finance experience includes work with the following programs:
 - o City of Austin – General Obligation Bond Funding, HOME, CDBG and HTF
 - o TDHCA – 9% and 4% Housing Tax Credits
 - o TDHCA – Housing Trust Fund, SECO Energy Grant Program and HOME Program
 - o 501(c)(3) Bond Program
 - o Federal Home Loan Bank (Affordable Housing Program)
 - o Resolution Trust Corporation – Affordable Housing Disposition Program
 - o Multi-family Private Activity Bonds
 - o HUD Section 8 Moderate Rehabilitation SRO Program, Supportive Housing Program and Shelter Plus Care
 - o Grants from foundations, corporations and individuals

Please see **ATTACHMENT 13** for a list of properties and the funding sources in place at each property. Also, please see Question 11 for more detailed information on Financing Experience.

9. **Development Schedule.** Complete the grid below. You may re-order the steps according to the appropriate sequence for your project and to add in any other significant steps integral to your project’s development. If the multiple properties are involved, provide a development schedule for each property.

	DATE(S)
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Acquisition and/or holding	Already Complete
Environmental and/or historic review (AHFC)	December 2013- February 2014
Securing and packaging project financing	Now – February 2014
Construction Specifications and Cost estimates	December 2013 – February 2014
Construction Bids	March 2014
Construction Start	May 2014
Anticipated Draws (list all)	June 2014 July 2014 August 2014 September 2014 October 2014 November 2014
End Construction	December 2014
Start of Rent-up	January 2015
Completion & Operation	February 2015

- 10. Accessible and Adaptable Units.** Indicate the number of units proposed to be **accessible and adaptable** for persons with mobility, sight and hearing disabilities as required by RHDA Program Guidelines.

_____ Units adaptable for persons with mobility disabilities

8 _____ Units accessible for persons with mobility disabilities

_____ Units adaptable for persons with sight and hearing disabilities

8 _____ Units accessible for persons with sight and hearing disabilities

- 11. Developer Capacity.** Provide narrative information on recent, similar, and successful experience in affordable housing development. Include experience using multiple fund sources, managing affordable rental developments, and previous working history with the Austin Housing Finance Corporation.

Recent Development Experience: Garden Terrace Phase III, as a new construction SRO, will draw on experiences learned from Capital Studios – FC’s first new construction SRO to be completed in late Summer 2014. In addition, Garden Terrace Phase III will draw upon the completion of four SRO housing communities – Garden Terrace, Spring Terrace, Skyline Terrace and Arbor Terrace and the new construction of M Station. Please see **ATTACHMENT 12** for a description of these projects and **ATTACHMENT 13** for a list of all projects developed by Foundation Communities, Inc.

Funding Experience: Foundation Communities, Inc. has experience utilizing all funding tools available for the development of affordable multifamily housing. We have an excellent track record of securing funding in competitive allocations such as the 9% LIHTC and the Federal Home Loan Bank Affordable Housing Program. We also have solid relationships with multiple lenders. Three most recently completed projects utilize the following five layers of funding: 9% LIHTCs, City of Austin RHDA funding, FHLB AHP program, construction/permanent loan and private fundraising.

LIHTCs and BONDS

Foundation Communities has applied for and been awarded 9% LIHTCs for six developments. Two of these awards were forward commitments by the Texas Department of Housing Board of Directors giving testament to Foundation Communities track record of high-quality developments with compelling missions. FC’s development team is well-versed in the LIHTC program and application process. All applications are completed in-house by staff. Staff also closely follows the drafting of the Qualified Allocation Plan and is aware of changes to threshold and scoring items that impact a high-scoring application. FC has a staff team that has over 10 years of tax credit compliance with a record of no significant findings. FC also has relationships with multiple tax credit investors including Enterprise Community Investment and Bank of America.

Foundation Communities built and financed the Southwest Trails Apartments utilizing 4% LIHTC and private activity bonds. Bonds were issued by Austin Housing Finance Corporation. The credits were purchased by Related Capital and the bonds financed with Chartermac. The closing took place over two days with a dozen attorneys, but was successful.

City of Austin RHDA

The City of Austin has been a major contributor on every project completed by Foundation Communities in the past 10 years. The FC Development team follows the release of the City’s application rules and NOFA and has a solid working relationship with City of Austin NHCD/AHFC staff.

FHLB AHP Program

Foundation Communities has applied for and received eight awards through the FHLB Affordable Housing Program and received the highest funding amount awarded for our M Station property of \$1,500,000.

Private Mortgages

Foundation Communities has excellent relationships with several lenders that allow for competitive rates and pricing. We currently have private mortgages with Compass Bank, Bank of America, Wells Fargo and Greater Texas Federal Credit Union.

Private Fundraising

Foundation Communities employs a diverse fundraising strategy. In 2012, private fundraising totaled over \$3,000,000 (not including capital funding from City of Austin). Foundation and corporate grants range from \$3000 to hundreds of thousands of dollars, and fund both capital projects and FC’s wide range of programs (education, supportive housing, etc.). For individual donations, we use the Benevon model, culminating in an annual A Place to Call Home fundraising luncheon. This year’s luncheon was attended by 750 invited guests, and raised more than \$800,000.

Property Management Experience: Foundation Communities performs all leasing, maintenance, accounting, compliance and other property management functions for its 14 Austin properties. Foundation Communities earns property management and asset management fees that help support the overall nonprofit mission. The success of Foundation Communities’ property management is demonstrated through its high occupancy (usually averaging more than 95 percent), low turnover (under 32 percent), ability to keep all properties performing within their operating budgets, completion of capital repairs of over \$535/unit, and a relatively high percentage of move outs going to homeownership (20 percent).

A majority of Foundation Communities’ 17 properties feature a federal source of funding. Specifically, Foundation Communities’ staff has experience with the compliance and reporting requirements of the Low Income Housing Tax Credit program, HOME program, and HUD Continuum of Care Funding Programs.

Please find attached **ATTACHMENT 13** for a list of the properties managed by Foundation Communities and the funding programs in place at the specific property. Garden Terrace Phase III will utilize the same staffing already in place at Garden Terrace Phase I and II with no need to add additional staff. Garden Terrace Phase I, II and III will total 123 units and will be staffed with a property manager, assistant property manager, lead maintenance and porter. The property will be staffed 24-hours a day with front desk clerks in addition to a Supportive Service Coordinator/Case Manager. All supportive housing properties are overseen by Kristy Bowers, Supportive Property Supervisor, who is overseen by Sandra Lumley, Property Director. Sandra has been with Foundation Communities for 20 years and has extensive knowledge of all funding programs and required compliance.

12. Detailed Project Budget.

DETAILED PROJECT BUDGET				
	Cost	Prior award of RHDA Funds (if any)	RHDA Funds Requested	Description or Comments
PREDEVELOPMENT				
Appraisal	\$0			
Environmental Review	\$0			
Engineering	\$0			included in architectural
Survey	\$5,000			
Architectural	\$74,595			
TOTAL PREDEVELOPMENT	\$79,595		\$0	

ACQUISITION				
Site and/or Land	\$0			
Structures				
Other (specify)				
TOTAL ACQUISITION	\$0		\$0	
CONSTRUCTION				
Infrastructure	\$24,242			
Site work	\$121,210			
Demolition	\$0			
Concrete	\$94,544			
Masonry	\$14,182			
Metals	\$9,697			
Wood and Plastics	\$213,208			
Waterproofing & Insulation	\$50,302			
Doors and Windows	\$57,817			
Finishes	\$178,057			
Specialties	\$38,788			
Furnishings (blinds/shades)	\$4,728			
Fire Suppression	\$31,879			
Plumbing	\$92,238			
HVAC	\$156,603			
Electrical	\$124,604			
Carpet	\$0			
Other: Unit Furniture	\$28,000			
Other: Contractor Fee	\$121,210			
Construction Contingency	\$68,096			
TOTAL CONSTRUCTION	\$1,429,405		\$1,200,000	
SOFT & CARRYING COSTS				
Legal	\$0			
Audit/Accounting	\$0			
Title/Recording	\$20,000			
Architectural (Inspections)	\$0			
Construction Interest	\$0			
Construction Period Insurance	\$16,000			
Construction Period Taxes	\$5,000			
Relocation	\$0			
Marketing	\$0			
Davis-Bacon Monitoring	\$0			
Other:	\$0			
TOTAL PROJECT BUDGET	\$1,550,000		\$1,200,000	

13. Funds Proposal. Provide the following information to facilitate financial review of the proposed project:

- a. **Sources and Uses of Funds** – Complete **Tables A (below) & B (on the following page)**, identifying all sources and uses of funds to implement project and include evidence of funds anticipated (financial statements, commitment letters, etc.).

TABLE A: SOURCES OF FUNDS SUMMARY					Intended Use of Funds (Predevelopment, Acquisition, Construction, Soft Costs)
	Term	Interest Rate	Amount	Evidence (Deed, Sales Contract)	
Owner Equity					

Private Financing (List Lenders)					
FHLB Atlanta AHP/FC Bridge \$			\$350,000	Commitment Letter	Construction/Soft Costs
Other Sources (List Below)					
Proposed RHDA Funds	30	0%	\$1,200,000	Current Application	Construction Costs
TOTAL			\$1,550,000		

TABLE B: USES OF FUNDS SUMMARY		
	Total Cost	Cost/Unit
Predevelopment	\$0	\$0
Acquisition	\$0	\$0
Hard Costs	\$1,429,405	\$71,470.25
Soft & Carrying Costs	\$95,595	\$4,779.75
Other Costs	\$25,000	\$1,250
Total Project Costs	\$1,550,000	\$77,500

- b. **Leveraging** – Complete **Table C (below)**. Include evidence of other funds leveraged by AHFC funds to implement the project such as owner equity and commitments from private and/or other public resources.

TABLE C: LEVERAGE SUMMARY	
TOTAL RHDA FUNDS	\$1,200,000
TOTAL OTHER FUNDS	\$350,000
LEVERAGE (%)	77%

- c. **Operating Proforma** – Please see **ATTACHMENT 14**.

14. Community Engagement Strategy or Efforts. Garden Terrace has been a part of the surrounding neighborhood for the past 10 years. Garden Terrace is located in the Far South Austin Community Association. We made contact with Betty Edgemond, the main contact for the association, and she had no opposition to the project or the required zoning change.

15. Description of Supportive Services. If supportive services are NOT to be provided, please stop here. For all other projects, if supportive services are to be provided to residents, provide a description of the services that includes the following information:

- a. **A description of the supportive services to be provided to residents and/or clients.**

Foundation Communities is committed to providing not only the housing, but, as part of our mission to create housing where residents succeed, the essential support services to stabilize and empower individuals living in permanent supportive housing. Foundation Communities' model of housing-plus-services provides the supportive services that individuals need to successfully transition to stability. The target population of Garden Terrace Phase III will be mixed serving a small percentage of chronic homeless and a larger percentage of individuals on fixed incomes and low-wage workers. Like the population, the array of services offered at Garden Terrace Phase III will be mixed with some residents needing more and some needing less.

Services typically offered at FC's Permanent Supportive Housing properties include:

- Mental health counseling and supported treatment;
- Individual and group substance abuse supported treatment;
- Daily living skills training;
- Budgeting and money management skills;
- Advocacy for benefits and entitlements including Social Security, Medicaid, and Food Stamps;
- Health, wellness and recreational activities;
- Supports for family reconnections;
- Vocational and supported employment services;
- Food pantry
- GED and ESL classes
- Eviction prevention
- Case management
- Home health assistant
- Education savings program
- Free tax preparation
- 24-hour computer lab
- Welcome Home Baskets

b. The number and types of residents/clients expected to be served annually.

Garden Terrace Phase III will house 20 individuals at any given time. The service needs of the property will vary according to the resident profile. We are targeting 20% of the units to chronic homeless and expect the service needs of this population to be extremely high. The balance of units will be targeted to individuals on fixed incomes and low-income workers who will still require a variety of services, but at a lower degree. With an average turnover of 30%, we expect to serve approximately 26 individuals a year with some degree of services.

c. Describe the developer's experience and qualifications in providing the services to be offered.

Foundation Communities, as the primary supportive service provider at Garden Terrace Phase III, has 20 years experience in the provision of supportive services to its residents. At all of our properties, we enable our residents to increase their personal development, education, safety, and health at one convenient location in their neighborhood. Through strategic partnerships, last year FC gave 600+ children of working parents a safe place to go when school's out right where they live and helped 85% of students maintain or improve grades. Talented volunteers help us increase adults' earning potential through classes in English as a Second Language, GED preparation, and computer skills, as well as employment counseling and social service referrals. Each year, we also empower more than 100 families to become smart consumers through economic education and at least 50% of them to reduce debt. More than 125 families have earned a 2-to-1 match in special savings accounts to purchase a home, attended college, or started a business. We also provide free income tax preparation for 20,000+ low-income workers and retirees with the help of 400 IRS-certified volunteers.

Foundation Communities has been increasingly involved in serving the homeless since 2001, when, working with the Homeless Alliance, we began looking at opportunities to develop supportive housing units for Austin's homeless population. In 2003, with the purchase and redevelopment of an abandoned nursing home, Garden Terrace opened its doors. This was not only Foundation Communities' first single room occupancy (SRO)/permanent supportive housing (PSH) community, it was the first intentional SRO development in Austin. We followed with the opening of Spring Terrace in 2006, Skyline Terrace in 2008 Arbor Terrace in 2012 and Capital Studios in 2014 for a total of 600 PSH SRO units.

Providing apartments in our SRO communities does not in itself end homelessness on a long-term basis. Our strategy of 'wrap around' supportive services helps our clients maintain housing and avoid a return to the streets. Our low income PSH residents include individuals coming out of homelessness, those with severe and persistent mental illness, people with physical disabilities, homeless and/or disabled veterans, older adults, those suffering from chronic disease (e.g., hypertension, diabetes), and young adults aging out of foster care with persistent mental and behavioral issues. We strive to provide – and increase – the services that will foster maximum stability and progress in our residents. Each community is staffed by Case Managers and Supportive Services Coordinators, who meet regularly with residents and assists them

with maintaining housing through accessing rental assistance, increasing income through employment, accessing public benefits to meet basic needs (such as food stamps, SSI/SSDI, unemployment benefits, etc), assisting with educational opportunities, and addressing behavioral issues. The Supportive Service Coordinator also works closely with property management to help tenants negotiate payment plans or take steps to address the issues preventing them from being self-sufficient. Case Managers work more intensely, and on a regular basis, with special needs vulnerable tenants.

We have recently begun a partnership with Lone Star Circle of Care to establish a “medical home” for many of our residents, including psychiatric services, as this is critical to maintaining their stability. A new funding source has allowed us to fund a Case Manager position for our newly-opened property, Arbor Terrace, as well as retain a nurse practitioner on staff to meet regular medical needs in this extremely vulnerable population. Other services provided include: an on-site food pantry residents can access monthly and on an emergency basis, computer classes, cooking classes, literacy tutoring, and counseling.

We further leverage services through partnerships and innovations including:

- Medication management and home chore assistance through a contract with Family Eldercare
- A collaboration including Austin Travis County Integrated Care, Austin Recovery, and NAMI Austin funded through a grant from the Substance Abuse and Mental Health Services Administration (SAMHSA) that provides clinical services to residents with substance abuse, mental health, or co-occurring issues.
- A direct assistance fund that case managers can strategically use to support client goals (eg. books for school or clothing for employment)
- The Terraces also receive and give referrals from many area agencies.

d. If services are not provided by the developer of the project, include a description of the organization(s) providing the services and a memorandum of understanding or some other type of agreement that indicates the relationship between the developer and service provider.

While Foundation Communities will be the main supportive service provider at Garden Terrace Phase III, we rely on partnerships with the following organizations to broaden and strengthen our service delivery:

- **Caritas of Austin:** provides HUD subsidized rent and case management services for 41 formerly chronically homeless and disabled unaccompanied adults living in our PSH communities.
- **Salvation Army/Passages:** provides HUD subsidized rent and case management services for 15 formerly homeless individuals living at our PSH communities.
- **PLAN of Central Texas, Inc.:** provides intensive clinical case management, peer to peer supports, and clinical supervision to residents in our PSH housing participating in our SAMSHA-funded mental health and substance abuse treatment support services program.
- **Austin Recovery, Inc.** – provides inpatient detox and substance abuse treatment services to residents participating in our SAMSHA-funded mental health and substance abuse treatment support services program.
- **Communities for Recovery:** provides peer to peer recovery aftercare services to residents in our SAMSHA-funded mental health and substance abuse treatment services program.
- **Austin Clubhouse, Inc.:** provides a work-ordered day program, as well as employment readiness supports, and transitional/supportive employment services.
- **Family Eldercare:** provides designated payee services, as well as in-home support including meal preparation assistance, transportation, housekeeping assistance, and medication reminder assistance to residents in our PSH communities (not just for older adults).
- **The University of Texas School of Nursing:** each semester, nursing students in the advanced community nursing practicum provide medical case management to our residents assisting them in better identifying and meeting their healthcare needs.
- **Integral Care (formerly Austin/Travis Co. MHMR):** Co-facilitate Mental Health First Aid trainings for the Austin community.
- **NAMI – Austin:** Provides funding for free counseling and therapy sessions at Capital Area Counseling for supportive housing residents.
- **Capital Area Food Bank:** partners in providing food pantries at our supportive housing communities. Also does Healthy Cooking Classes at with residents at our properties.
- **YMCA of Austin:** Partners with our SRO resident services to provide reduced rate family memberships for residents to participate in Fresh Start Fitness program. 12 residents can participate for 90 days, after which they can continue personal membership in an income-based program, usually \$10/month.
- **Austin Area Mental Health Consumers Self Help and Advocacy Center:** Partners in providing peer-to-peer wellness groups at our supportive housing communities.

- **Downtown Austin Community Court (DACC):** Partners in providing 20 units of PSH in two of our communities for chronically homeless/disabled individuals who are chronic users of DACC resources.
 - **Project Transitions:** Partners in providing 5 units of PSH for individuals living with HIV/AIDS.
 - **Lone star Circle of Care:** Provides integrated care (behavioral health & primary health care) for residents under the auspices of the Federal Substance Abuse and Mental Health Administration (SAMHSA) Services in Supportive Housing (SSH) Grant.
 - **Bluebonnet Trails Community Services:** provides outreach, screening, assessment, and referral for individuals attempting to recover from substance use disorders.
 - **Veteran Affairs Supportive Housing Program:** provides TBRA vouchers for homeless veterans.
 - **Capital Area Counseling:** partnership providing counseling/therapy to PSH residents.
 - **Basic Need Coalition:** Active participation.
 - **Ending Community Homelessness Organization (ECHO):** Both our Director of Supportive Housing and Director of Supportive Services are active members and participate with the Housing Work Group. These groups combine the efforts of roughly 75 participating agencies.
 - **Referrals:** The Terraces receive and give referrals from many area agencies, including Austin Travis County Integrated Care, SafePlace, Lifeworks, Salvation Army, Goodwill, Foundation for the Homeless, Aids Services of Austin, Green Doors, and the U.S. Department of Veteran Affairs.
- e. **Provide resumes of key personnel who will be actively involved in the delivery of services. Resumes should include information about certifications, licenses, years of experience, and education.**

Supportive Service Staff (Please see **ATTACHMENT 15** for staff resumes):

Julian Huerta, Deputy Executive Director, joined FC in 1998 and brings more than 20 years of experience in nonprofit administration, program development and the provision of affordable housing. Julian oversees all of Foundation Communities resident service programs as well as develops and directs educational, social service and asset-building programs that serve more than 20,000 working poor families and homeless adults annually.

Mario Cortez, Director of Supportive Housing. Mario has more than 15 years of experience working with homeless and low-income populations, and holds a Masters in Social Work. Prior to joining Foundation Communities, he spent three years developing the Keep Austin Housed AmeriCorps project. He Co-Chairs the Social Services Case Management Network & the Housing Stability Committee of the Basic Needs Coalition, sits on the Executive Committee of the Basic Needs Coalition, and leads planning for Stand Up and Be Counted. Mario oversees all supportive housing programs.

Tim Miles, Director of Supportive Services. Tim has been working professionally in the nonprofit social service field since 1990. His experience includes managing group homes, coordinating community mental health services for children and families, and providing wraparound services to homeless, dually-diagnosed, mentally ill adults. Tim is a U.S. Army veteran, and holds graduate degrees in theology and social work. Tim oversees supportive services at FC's permanent supportive housing communities.

Supportive Service Coordinators and Case Managers work at the permanent supportive housing communities. Working closely with property managers, they develop creative programs and establish and oversee partnerships that support residents in successfully maintaining housing, accessing education and employment services and contributing to a positive sense of community. Case managers work with a smaller number of high-needs clients on a regular basis, e.g., weekly, to provide these individuals with the more intensive support they need to maintain housing and stability. A part-time Case Manager will be hired for Phase III that meets the job qualifications attached.

- f. **Demonstrate financial capacity to provide support services and/or operate a supportive services program by providing the following information:**

1. **Sources of Funds: Identify sources and amounts of funds that will be or are expected to be utilized to provide supportive services.**

A portion of the staffing and program costs for the Supportive Service programming at Garden Terrace Phase III is included as a line-item in the property's operating pro-forma. Cash flow from the property will be used to fund the salary of the full-time Social Service Coordinator plus other smaller program expenses (i.e. direct aid to residents.) The remaining portion of the services will

be funded through the St. David's Foundation – Healthy Minds program and the Travis County – Justice Reinvestment Initiative (JRI).

Sources:

Project Cash Flow w/in Operating budget	\$9,325
St. David's Foundation – Healthy Minds	\$74,025
Travis County – Justice Reinvestment Initiative (JRI)	\$28,750
TOTAL	\$112,100

Please see **ATTACHMENT 14** for the Garden Terrace Phase III Operating Proforma and **ATTACHMENT 16** for a detailed Supportive Service budget.

- 2. Budget: Include a supportive services budget which reflects current and anticipated funding and expenses associated with the provision of services for three (3) years.**

Please see **ATTACHMENT 16** for a detailed supportive services budget for Garden Terrace Phase III.

ATTENTION:

Please submit with the Application a completed "self-evaluation" using the following Scoring Criteria.

**RHDA PROGRAM
 SCORING CRITERIA**

REQUIRED INFORMATION:

- | | | | |
|-------------------------------|-------|--------------------------------|-------|
| 1. Applicant Information | _____ | 10. Accessible/Adaptable Units | _____ |
| 2a. Non-profit Required Items | _____ | 11. Experience/Qualifications | _____ |
| OR | | 12. Project Budget | _____ |
| 2b. For-profit Required Items | _____ | 13. Funds Proposal: | |
| 3. Project Description | _____ | a. Sources | _____ |
| 4. Site Control/Value | _____ | b. Uses | _____ |
| 5. Zoning | _____ | c. Leveraging | _____ |
| 6. S.M.A.R.T. Housing | _____ | d. Operating Proforma | _____ |
| 7. Development Team | _____ | 14. Good Neighbor Checklist | _____ |
| 8. Development Schedule | _____ | | |
| 9. Developer Capacity | _____ | | |

EVALUATION CRITERIA:

Applications for proposed projects will be reviewed and scored on a competitive basis per the evaluation criteria below. Applications must receive a minimum score of **150** points out of a maximum score of **240** points. PLEASE NOTE: A score above the minimum score does not guarantee funding.

CORE VALUES POINTS

(Affordable Housing Core Values: Deeper levels of affordability, long-term affordability, and geographic dispersion of affordable units throughout the City.)

Score

1. AFFORDABLE UNITS (maximum 25 points)

25

If development has a mix of 30%, 40%, and/or 50% MFI units, add the results for the percentage of units in each income category up to the maximum of 25 points. If the percentage of units at a given MFI level is not a multiple of 10, round up to the next closest multiple of 10 to get the score for that particular MFI level

% MFI	% of Affordable Units in Project (only count units reserved for 50% MFI and below)					
	10% of units	20% of units	30% of units	40% of units	50% of units	60% of units
50%	3	5	10	15	20	25
40%	5	10	15	20	25	
30%	10	15	20	25		

Score

2. AFFORDABILITY PERIOD (25 points)

25

25 points: Affordability period is:

_____ 99 years;

OR

40 years, and project is applying for Low Income Housing Tax Credits. Note: AHFC funding is contingent upon the award of Low Income Housing Tax Credits.

Score

3. GEOGRAPHIC DISPERSION (maximum 25 points) 10

Project is located in an area identified according to the Kirwan Institute's Comprehensive Opportunity Map of Austin as having greater opportunity for low-income households.

- 25 points:** Very High priority area
- 20 points:** High priority area
- 15 points:** Moderate priority area
- 10 points:** Low priority area
- 5 points:** Very Low priority area

INITIATIVES AND PRIORITIES POINTS

(Permanent Supportive Housing, Sustainability, Priority Locations, Accessible and Integrated, and Preservation of Affordable Housing)

Score

4. PERMANENT SUPPORTIVE HOUSING (PSH) (maximum 25 points) 15

25 points: "Housing First" model.

15 points: Project will reserve units for PSH for the following populations:

- Chronically Homeless as established in the HEARTH Act (24 CFR Part 577)
- Have been in an institution for over 90 days
- Unaccompanied youth or families with children defined as homeless under other federal statutes
- Youth "aging out" of state custody or the foster care or the juvenile probation system

10 points: Project will reserve units for PSH for populations other than those listed above.

Score

5. SINGLE-FAMILY RENTAL HOUSING, INCLUDING SECONDARY UNITS ("GREEN ALLEY INITIATIVE") (20 points) _____

20 points: Project consists of either new construction or rehabilitation of one or more single-family rental units, secondary units, or units compatible with the City's "Green Alley Initiative."

Score

6. ACCESSIBILITY AND HOUSING FOR PERSONS WITH DISABILITIES (maximum 20 points) 20

X _____ 10 points: In multi-family developments, (i.e. 5 or more units) or for single-family rental housing (i.e., 1 to 4 units), 50% or more of the total number of units will be made accessible per the Uniform Federal Accessibility Standards (UFAS).

X _____ 10 points: Units to be designated for persons with disabilities as defined in the Fair Housing Act: for Multi-family developments, (i.e. 5 or more units), at least 25% of all units; for single-family rental housing (i.e., 1 to 4 units) 1 or more units.

Score

7. **PRIORITY LOCATION** (10 points) 10

10 points: Project is:

- located in a Vertical Mixed-Use (VMU) Corridor; or
- a Planned-Unit Development (PUD); or
- located within a Transit-Oriented Development (TOD) area, or
- is located 0.25 miles (1,320 feet) or less from a transit stop.

Score

8. **PRESERVATION OF AFFORDABLE UNITS** (10 points)

10 points: Project is the rehabilitation and preservation of existing affordable housing units, or new units are being constructed to replace existing affordable units at the same location on a one-to-one replacement basis or a greater than one-to-one replacement basis.

Score

9. **TRANSITIONAL HOUSING** (10 points)

10 points: Project will be developed and operated exclusively as transitional housing.

UNDERWRITING POINTS

(EXPERIENCE, CAPACITY, DEVELOPMENT FEASIBILITY, OPERATIONAL FEASIBILITY, COMPATIBILITY WITH OTHER PROGRAM REQUIREMENTS)

Score

10. **DEVELOPER EXPERIENCE AND QUALIFICATIONS** (maximum 15 points) 15

- 15 points:** Developer has recent, similar, and successful completion of a development similar in size and scope with income-restricted units.
- 10 points:** Developer has recent, similar, and successful completion of a development **smaller** in size and scope with income-restricted units.
- 8 points:** Consultant directly involved who has successfully completed a development similar in size and scope with income-restricted units.
- 5 points:** Developer has recent, similar, and successful completion of a development similar in size and scope **without** income-restricted units

Score

11. **SOURCES & USES OF FUNDS** (maximum 10 points) 5

10 points: All sources and uses of funds are clearly indicated and sufficient evidence of funding availability and/or commitments are included.

5 points: All sources and uses of fund are clearly indicated, but evidence of funding availability or commitments are incomplete.

Score

12. DEBT COVERAGE RATIO (maximum 10 points)

10 _____

- 10 points:** DCR of 1.25 or greater or will be a debt-free development
- 6 points:** DCR between 1.21 - 1.24
- 4 points:** DCR between 1.15 - 1.20

Score

13. LEVERAGE (maximum 10 points)

RHDA Program funding (including prior awards and the current request) divided by Total Project Costs equals:

- 10 points:** 25% or less
- 8 points:** 26% - 30%
- 6 points:** 31% - 35%
- 4 points:** 36% - 50%
- 2 points:** 51% - 54%
- 0 points:** 55% or greater

Score

14. RHDA COST PER UNIT in \$1,000s (maximum 10 points)

2 _____

	<u>Multi-Unit Structures</u>	<u>Single-Unit Structures</u>
10 points	<\$40/unit	<\$50/unit
8 points	<\$45/unit	<\$60/unit
6 points	<\$50/unit	<\$70/unit
4 points	<\$55/unit	<\$80/unit
2 points	<\$60/unit	<\$90/unit

Score

15. PROJECT READINESS (maximum 10 points)

6 _____

New construction

2 points each; maximum 10 points

- The project meets the normal eligibility requirements under the existing program guidelines.
- The property is already owned by the developer.
- The project has completed all necessary design work and received site plan approval.
- All environmental reviews have been completed.
- The project has firm commitments from all financing sources.

Acquisition and Rehab

2 points each; maximum 10 points

- The project meets the normal eligibility requirements under the existing program guidelines
- All environmental reviews have been completed.
- The project has firm commitments from all financing sources.
- A General Contractor has been selected.
- Closing on the acquisition of the property can be achieved in less than 30 days.

Acquisition of Completed Units

2.5 points each; maximum 10 points (A total score of 2.5 points will be rounded to 3; a total score of 7.5 points will be rounded to 8.)

- The project meets the normal eligibility requirements under the existing program guidelines
- All environmental reviews have been completed.
- The project has firm commitments from all financing sources.
- Closing on the acquisition of the property can be achieved in less than 30 days.

Score

16. PROPERTY MANAGEMENT (maximum 10 points) **10**

10 points: Designated Property Management Entity has documented track record of success managing income-restricted properties of similar size and/or similar unit counts, and has the capacity to take on management of the proposed project.

8 points: Designated Property Management Entity has a documented track record of success managing income- restricted properties of smaller size and/or fewer units, and has the capacity to take on management of the proposed project.

4 points: Designated Property Management Entity has a documented track record of successful property management experience and has the capacity to take on management of the proposed project, but has not managed an income-restricted property.

Score

17. SUPPORTIVE SERVICES (maximum 15 points) **15**

15 points:

- a. The developer has secured written agreements with organizations that will provide resident services, or has experienced and qualified staff (7 or more years of experience) able to provide the same services.
- b. Funds have been identified for the operation of resident services programs.
- c. A 3-year estimated operating budget for the operation of the resident services programs is provided.

10 points:

- a. The developer has secured letters of intent from organizations that intend to provide resident services, or has experienced and qualified staff (3 to 6 years of experience) able to provide the same services.
- b. Funds have been identified for the operation of the resident services programs.
- c. A 3-year estimated operating budget for the operation of the resident services programs is provided.

5 points:

- a. The developer has experienced and qualified staff (1 to 2 years of experience) able to provide the same resident services.
- b. Funds have been identified for the operation of the resident services programs.
- c. A 3-year estimated operating budget for the operation of the resident services programs is provided.

Score

18. MBE/WBE PROJECT PARTICIPATION (5 points) **5**

5 points: Development Team includes one or more registered City of Austin minority- or woman-owned business enterprises (M/WBE).

TOTAL SCORE 173

ATTACHMENT 1:
Certificate of Status



Office of the Secretary of State

Certificate of Fact

The undersigned, as Secretary of State of Texas, does hereby certify that the document, Articles Of Incorporation for FOUNDATION COMMUNITIES, INC. (file number 114499001), a Domestic Nonprofit Corporation, was filed in this office on March 05, 1990.

It is further certified that the entity status in Texas is in existence.

In testimony whereof, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in Austin, Texas on December 10, 2013.



A handwritten signature in black ink, appearing to read "John Steen".

John Steen
Secretary of State

ATTACHMENT 2: IRS Certification

Internal Revenue Service

Date: August 24, 2004

Foundation Communities, Inc.
3036 South First Street
Austin, TX 78704-6391

Department of the Treasury
P. O. Box 2508
Cincinnati, OH 45201

Person to Contact:

Janet M. Duncan 31-07676
Customer Service Specialist

Toll Free Telephone Number:

8:00 a.m. to 6:30 p.m. EST
877-829-5500

Fax Number:

513-263-3756

Federal Identification Number:

Group Exemption Number:

7171

Dear Sir or Madam:

This is in response to your request of July 6, 2004, regarding your organization's tax-exempt status.

In May 1990 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under section 509(a)(2) of the Internal Revenue Code.

Based on the information supplied, we recognized the subordinates named on the list your organization submitted as exempt from federal income tax under section 501(c)(3) of the Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Janna K. Skufca, Director, TE/GE
Customer Account Services

INTERNAL REVENUE SERVICE
DISTRICT DIRECTOR
1100 COMMERCE STREET
DALLAS, TX 75242-0000

DEPARTMENT OF THE TREASURY

Date:

JUN 06 1995

CENTRAL TEXAS MUTUAL HOUSING
ASSOCIATION
C/O CINDY CHRISTIANSEN
2512 S IH 35 STE 350
AUSTIN, TX 78704-5751

Employer Identification Number:

Case Number:

755122043

Contact Person:

ANNETTE SMITH

Contact Telephone Number:

(214) 767-6023

Our Letter Dated:

May 23, 1990

Addendum Applies:

No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(2).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(2) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(2) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



Bobby E. Scott
District Director

Letter 1050 (DO/CG)

ATTACHMENT 3:

Audit

ATTACHMENT 4: Board Resolution

**RESOLUTION
BOARD OF DIRECTORS OF
Foundation Communities, Inc.
Garden Terrace Phase III**

WHEREAS, **Foundation Communities, Inc.**, a non-profit Community Housing Development Organization, is applying for funding from the Austin Housing Finance Corporation in Rental Housing Development Assistance Funding for the following project:

Up to \$1,200,000 in funding for a proposed 20-unit rent supportive housing community as a Phase III to Garden Terrace located at 1015 W. William Cannon, Austin, TX 78745. The funding will be used soft costs and construction costs.

NOW, THEREFORE, the Board of Directors of **Foundation Communities, Inc.** hereby authorizes making an application for funding to the Austin Housing Finance Corporation.

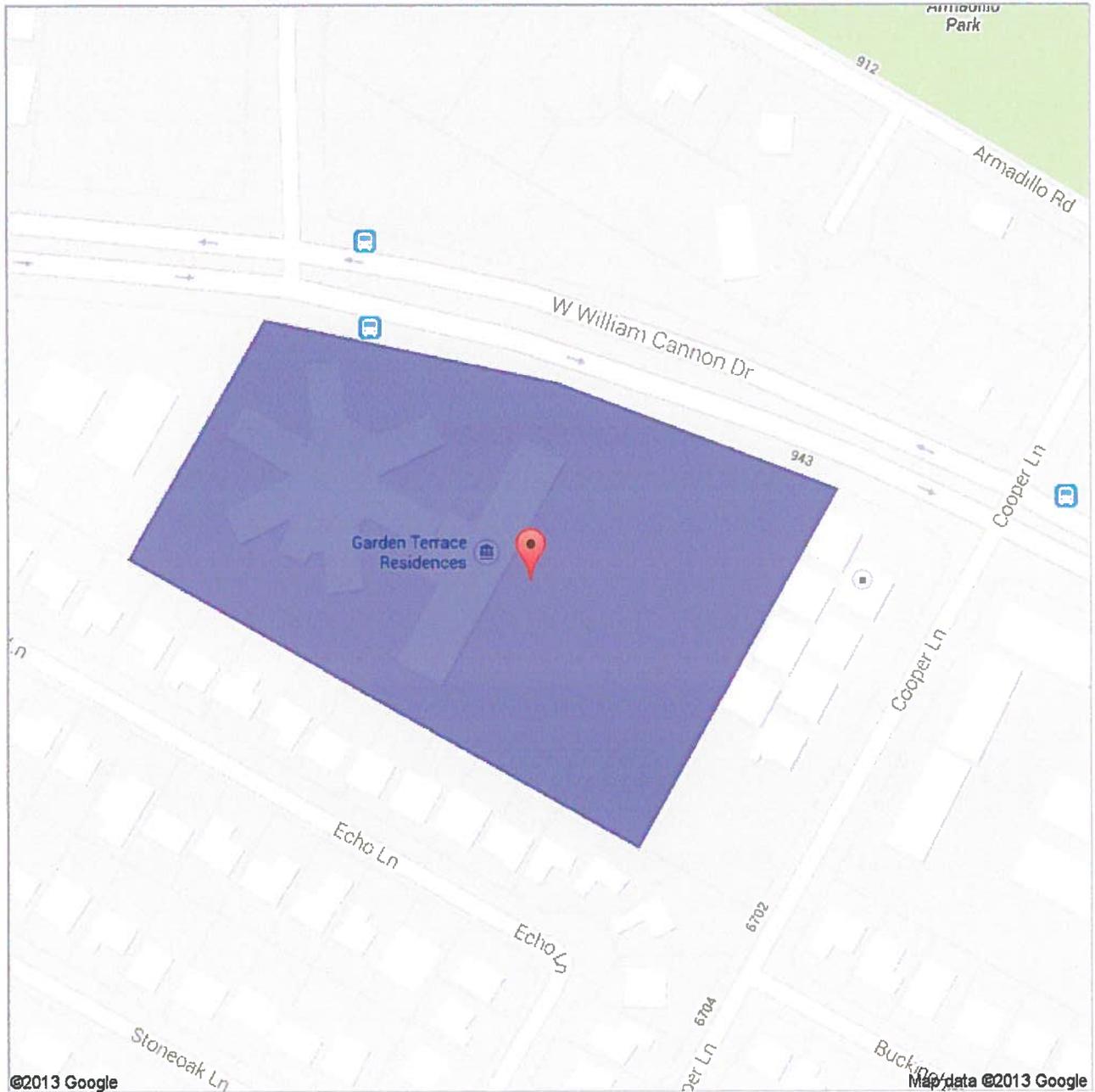
Adopted and approved by the Board of Directors on the 12th day of November, 2013.

FOUNDATION COMMUNITIES, INC.



**Christina Cohee, Secretary
Board of Directors of Foundation Communities, Inc.**

ATTACHMENT 5: Transit Map



Garden Terrace Phase III



Route 333

The bus stop for route 333 (William Cannon, East Bound) is 0.06 miles away from the proposed Garden Terrace Phase III. This route takes riders from as far West as Oak Hill, along William Cannon, to as far East as the Grand Meadow Neighborhood.



Garden Terrace



Garden Terrace Phase III
1015 West William Cannon
Austin, TX 78745

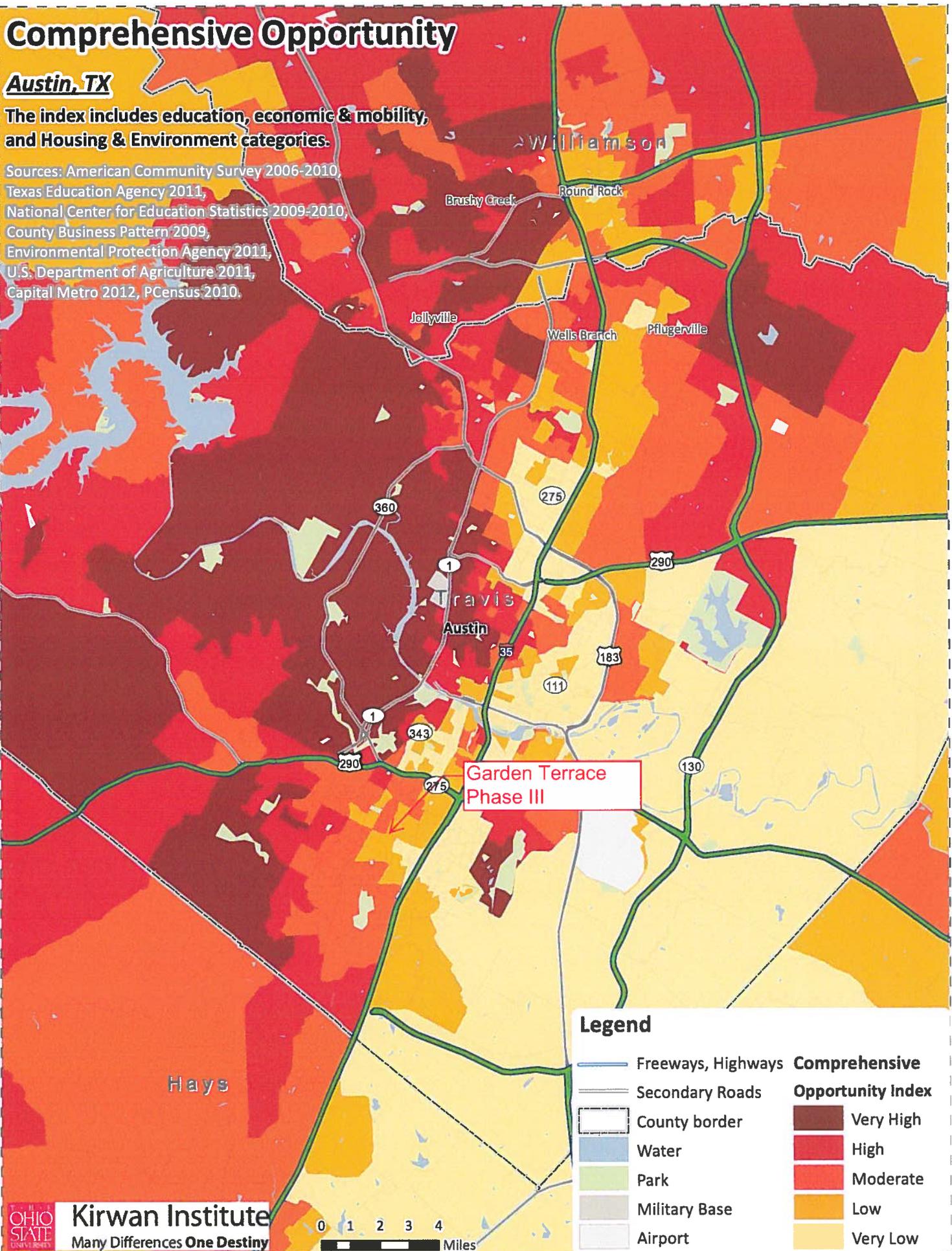
**ATTACHMENT 6:
Opportunity Map of
Austin**

Comprehensive Opportunity

Austin, TX

The index includes education, economic & mobility, and Housing & Environment categories.

Sources: American Community Survey 2006-2010, Texas Education Agency 2011, National Center for Education Statistics 2009-2010, County Business Pattern 2009, Environmental Protection Agency 2011, U.S. Department of Agriculture 2011, Capital Metro 2012, PCensus 2010.



ATTACHMENT 7:

Site Control

02-81675-LP

SPECIAL WARRANTY DEED

STATE OF TEXAS

COUNTY OF TRAVIS

Date: FEBRUARY 28, 2002

Grantor: FOUNDATION COMMUNITIES, INC.
Address: 3036 South 1st
Suite 200
Austin, Texas 78704

Grantee: GARDEN TERRACE HOUSING CORP.
Address): 3036 South 1st
Suite 200
Austin, Texas 78704

Consideration:

The sum of Ten and No/100 Dollars (\$10.00) and other good and valuable cash consideration in hand paid by Grantee to Grantor, the receipt and sufficiency of which is hereby acknowledged, and for the payment of which no lien, express or implied, is retained against the Property.

Property (including any improvements):

Lot 1-B, SOUTHWEST MEDIPLEX RESUBDIVISION OF LOT 1, a subdivision in the City of Austin, Travis County, Texas, according to the map or plat recorded in Volume 72, Page 45, Plat Records of Travis County, Texas

Reservations from and Exceptions to Conveyance and Warranty:

This conveyance is expressly made and accepted subject to all easements, restrictions, encumbrances and other matters of record affecting the property, to the extent that the same are valid and enforceable against the Property, as same are shown by instruments filed for record in the office of the County Clerk of Travis County, Texas.

Grantor, for the consideration and subject to the reservations from and exceptions to the conveyance and warranty set forth above, has **GRANTED, SOLD AND CONVEYED** and does hereby **GRANT, SELL AND CONVEY** to Grantee the Property, together with all and singular the improvements located thereon and all rights and appurtenances pertaining thereto, including all right, title and interest of Grantor in and to adjacent streets, alleys, rights-of-way, roadways, strips and gores, easements and in-the-ground utilities. **TO HAVE AND TO HOLD** the Property to Grantee, Grantee's heirs, executors, administrators, legal representatives, successors and assigns forever. Grantor binds Grantor and Grantor's heirs, executors, administrators, legal representatives, successors and assigns to warrant and forever defend all and singular the Property to Grantee and Grantee's heirs, executors, administrators, legal representatives, successors and assigns against every person whomsoever lawfully claiming or to claim the same or any part thereof, by, through and under Grantor and not otherwise, and in all events except as to the reservations from and exceptions to conveyance and warranty set forth above.

Whenever the content of this Deed so requires, the singular shall include the plural, the plural shall include the singular and any gender shall include all other genders.

Payment of any taxes is assumed by Grantee.

FOUNDATION COMMUNITIES, INC.

BY: Walter Morean
NAME: WALTER MOREAN
TITLE: EXECUTIVE DIRECTOR

STATE OF TEXAS

COUNTY OF TRAVIS

This instrument was acknowledged before me on this 28 day of February, 2002,
by Walter Morean, Exec. Director of FOUNDATION COMMUNITIES, INC., a Texas nonprofit corporation, on behalf of said corporation



[Signature]
Notary Public, State of Texas

Return to After Recording:
Fidelity National Title
515 Congress Ave., #100
Austin, TX 78701

GF# _____

FILED AND RECORDED
OFFICIAL PUBLIC RECORDS

Dana DeBeauvoir

03-07-2002 03:44 PM 2002044364
EVANSK \$13.00
DANA DEBEAUVOIR, COUNTY CLERK
TRAVIS COUNTY, TEXAS

**ATTACHMENT 8:
Current Tax
Documentation**

Travis CAD

Property Search Results > 330133 GARDEN TERRACE HOUSING CORP for Year 2013

Property

Account

Property ID: 330133 Legal Description: LOT 1B * RESUB OF LOT 1 SOUTHWEST MEDIPLEX
 Geographic ID: 0418140412 Agent Code:
 Type: Real
 Property Use Code:
 Property Use Description:

Location

Address: 1015 W WILLIAM CANNON DR Mapsco: 643V
 TX 78745
 Neighborhood: ALT LIVING Map ID: 042318
 Neighborhood CD: 89EXE

Owner

Name: GARDEN TERRACE HOUSING CORP Owner ID: 292830
 Mailing Address: 3036 S 1ST ST STE 200 % Ownership: 100.000000000000%
 AUSTIN, TX 78704-6352
 Exemptions: EX-XV

Values

(+) Improvement Homesite Value: + \$0
 (+) Improvement Non-Homesite Value: + \$2,994,339
 (+) Land Homesite Value: + \$0
 (+) Land Non-Homesite Value: + \$754,023 Ag / Timber Use Value
 (+) Agricultural Market Valuation: + \$0 \$0
 (+) Timber Market Valuation: + \$0 \$0

 (=) Market Value: = \$3,748,362
 (-) Ag or Timber Use Value Reduction: - \$0

 (=) Appraised Value: = \$3,748,362
 (-) HS Cap: - \$0

 (=) Assessed Value: = \$3,748,362

Taxing Jurisdiction

Owner: GARDEN TERRACE HOUSING CORP
 % Ownership: 100.000000000000%
 Total Value: \$3,748,362

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
01	AUSTIN ISD	1.242000	\$3,748,362	\$0	\$0.00
02	CITY OF AUSTIN	0.502700	\$3,748,362	\$0	\$0.00
03	TRAVIS COUNTY	0.494600	\$3,748,362	\$0	\$0.00
0A	TRAVIS CENTRAL APP DIST	0.000000	\$3,748,362	\$0	\$0.00
2J	TRAVIS COUNTY HEALTHCARE DISTRICT	0.129000	\$3,748,362	\$0	\$0.00

68	AUSTIN COMM COLL DIST	0.094900	\$3,748,362	\$0	\$0.00
Total Tax Rate:		2.463200			
				Taxes w/Current Exemptions:	\$0.00
				Taxes w/o Exemptions:	\$92,329.65

Improvement / Building

Improvement #1: REST/NURSE HOME State Code: F1 Living Area: 27486.0 sqft Value: \$1,900,383

Type	Description	Class CD	Exterior Wall	Year Built	SQFT
1ST	1st Floor	D - 4		1975	27486.0
011	PORCH OPEN 1ST F	* - 5-		1975	898.0
011	PORCH OPEN 1ST F	* - 4		1975	357.0
491	SPRINKLER HEADS	* - *		1975	27486.0
551	PAVED AREA	AA - *		1975	14500.0
611	TERRACE	CA - *		1990	99.0
611	TERRACE	CA - *		1990	189.0

Improvement #2: REST/NURSE HOME State Code: F1 Living Area: 15687.0 sqft Value: \$1,093,956

Type	Description	Class CD	Exterior Wall	Year Built	SQFT
1ST	1st Floor	D - 4		1986	15687.0
491	SPRINKLER HEADS	A - *		1986	15687.0
501	CANOPY	G - *		1986	256.0
611	TERRACE	CA - *		1986	864.0
501	CANOPY	G - *		1990	42.0
501	CANOPY	G - *		1990	32.0
501	CANOPY	G - *		1990	32.0
611	TERRACE	CA - *		1990	176.0
611	TERRACE	CA - *		1990	84.0
611	TERRACE	CA - *		1990	40.0
611	TERRACE	CA - *		1990	192.0
611	TERRACE	CA - *		1990	192.0

Land

#	Type	Description	Acres	Sqft	Eff Front	Eff Depth	Market Value	Prod. Value
1	LAND	Land	5.7700	251341.00	0.00	0.00	\$754,023	\$0

Roll Value History

Year	Improvements	Land Market	Ag Valuation	Appraised	HS Cap	Assessed
2014	N/A	N/A	N/A	N/A	N/A	N/A
2013	\$2,994,339	\$754,023	0	3,748,362	\$0	\$3,748,362
2012	\$3,076,889	\$754,023	0	3,830,912	\$0	\$3,830,912
2011	\$2,056,442	\$754,023	0	2,810,465	\$0	\$2,810,465
2010	\$8,688,902	\$754,023	0	9,442,925	\$0	\$9,442,925
2009	\$8,858,954	\$754,023	0	9,612,977	\$0	\$9,612,977

Deed History - (Last 3 Deed Transactions)

#	Deed Date	Type	Description	Grantor	Grantee	Volume	Page	Deed Number
1	2/28/2002	CD	CORRECTION DEED	GARDEN TERRACE HOUSING CORP	GARDEN TERRACE HOUSING CORP			2007200885TR

2	2/28/2002	SW	SPECIAL WARRANTY DEED FOUNDATION	GARDEN TERRACE	00000	00000	2002044364TR
			COMMUNITIES INC	HOUSING CORP			

Questions Please Call (512) 834-9317

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Database last updated on: 12/10/2013 3:42
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ATTACHMENT 9:

Zoning

ORDINANCE NO. 20130829-103

AN ORDINANCE REZONING AND CHANGING THE ZONING MAP FOR THE PROPERTY LOCATED AT 1015 WEST WILLIAM CANNON DRIVE FROM MULTI FAMILY RESIDENCE LOW DENSITY-CONDITIONAL OVERLAY (MF-2-CO) COMBINING DISTRICT TO MULTI FAMILY RESIDENCE LOW DENSITY-CONDITIONAL OVERLAY (MF-2-CO) COMBINING DISTRICT.

BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF AUSTIN:

PART 1. The zoning map established by Section 25-2-191 of the City Code is amended to change the base district from multi family residence low density-conditional overlay (MF-2-CO) combining district to multi family residence low density-conditional overlay (MF-2-CO) combining district on the property described in Zoning Case No. C14-2013-0077.SH, on file at the Planning and Development Review Department, as follows:

Lot 1B, Southwest Mediplex Resubdivision of Lot 1 Subdivision, a subdivision in the City of Austin, Travis County, Texas, according to the map or plat of record in Plat Book 72, Page 62 of the Plat Records of Travis County, Texas (the "Property"),

locally known as 1015 West William Cannon Drive in the City of Austin, Travis County, Texas, and generally identified in the map attached as Exhibit "A".

PART 2. The Property within the boundaries of the conditional overlay combining district established by this ordinance is subject to the following conditions:

- A. The maximum height, as defined by City Code, of a building or structure on the Property may not exceed 35 feet.
- B. The maximum height of a building or structure on the Property may not exceed two stories.
- C. Development of the Property may not exceed 123 residential units.
- D. Development of the Property may not exceed 21.32 residential units per acre.

Except as specifically restricted under this ordinance, the Property may be developed and used in accordance with the regulations established for the multi family residence low density (MF-2) base district and other applicable requirements of the City Code.

PART 3. This ordinance takes effect on September 9, 2013.

PASSED AND APPROVED

August 29

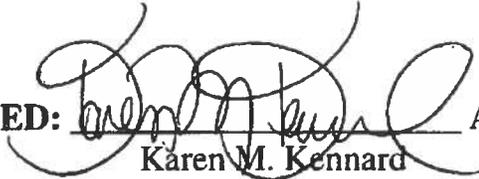
, 2013

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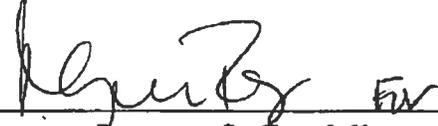
Joe Leffingwell
Mayor

APPROVED:

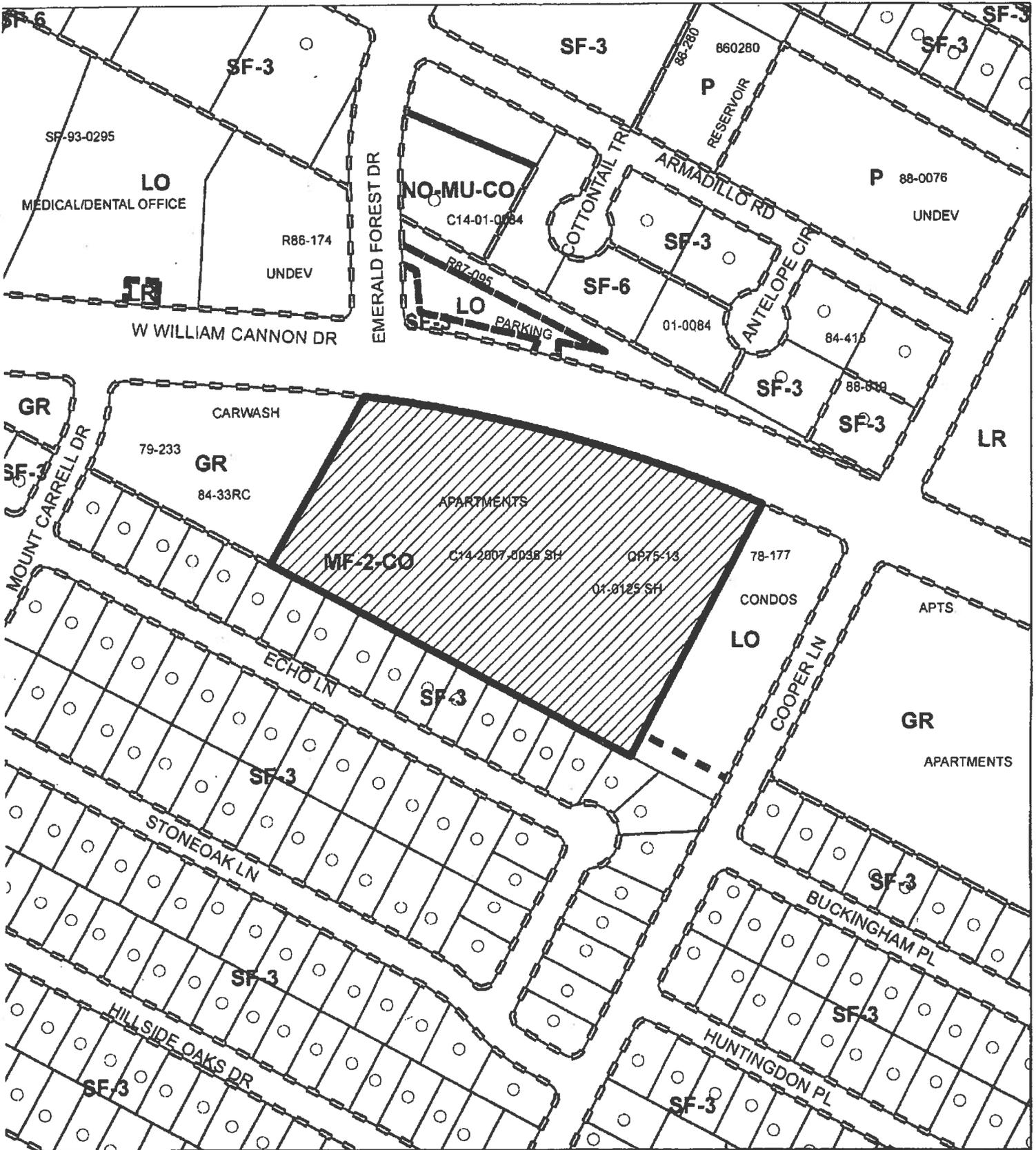


Karen M. Kennard
City Attorney

ATTEST:



Jannette S. Goodall
City Clerk



ZONING

ZONING CASE#: C14-2013-0077.SH



-  SUBJECT TRACT
-  PENDING CASE
-  ZONING BOUNDARY



1" = 200'

This product is for informational purposes and may not have been prepared for or be suitable for legal, engineering, or surveying purposes. It does not represent an on-the-ground survey and represents only the approximate relative location of property boundaries.

This product has been produced by CTM for the sole purpose of geographic reference. No warranty is made by the City of Austin regarding specific accuracy or completeness.

Exhibit A

**ATTACHMENT 10:
S.M.A.R.T. Housing
Certification**



City of Austin

P.O. Box 1088, Austin, TX 78767
www.cityofaustin.org/housing

Neighborhood Housing and Community Development Department

June 13, 2013

S.M.A.R.T. Housing Certification
Foundation Communities Inc.- 1015 West William Cannon- Garden Terrace Phase III
(id #65499)

TO WHOM IT MAY CONCERN:

Foundation Communities Inc. (development contact: Walter Moreau (512)-610-4016 (o); walter.moreau@foundcom.org) has submitted a S.M.A.R.T. Housing application for the construction of a **20 unit multi-family** development at **1015 West William Cannon**. The project will be subject to a five (5) year affordability period after issuance of certificate of occupancy.

NHCD certifies that the proposed construction meets the S.M.A.R.T. Housing standards at the pre-submittal stage. Since **100%** of the units (20 units) will serve households at or below **50%** Median Family Income (MFI), the development will be eligible for **100%** waiver of the fees listed in Exhibit A of the S.M.A.R.T. Housing Resolution adopted by the City Council. The expected fee waivers include, but are not limited to, the following fees:

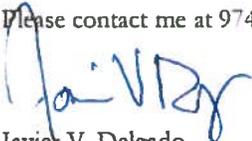
Capital Recovery Fees	Site Plan Review	Land Status Determination
Building Permit	Misc. Site Plan Fee	Building Plan Review
Concrete Permit	Construction Inspection	Parkland Dedication (<i>by separate ordinance</i>)
Electrical Permit	Subdivision Plan Review	
Mechanical Permit	Misc. Subdivision Fee	
Plumbing Permit	Zoning Verification	

In addition, the development must:

- ◆ Pass a final inspection and obtain a signed Final Approval from the Green Building Program. (Separate from any other inspections required by the City of Austin or Austin Energy. Contact Katherine Murray 482-5351).
- ◆ Pass a final inspection to certify that accessibility standards have been met.

The applicant must demonstrate compliance with the reasonably-priced standard after the completion of the units, or repay the City of Austin in full the fees waived for this S.M.A.R.T. Housing certification. **Please note that the applicant should contact Staff prior to submittal of site plan for pre-submittal meeting with review Staff.**

Please contact me at 974-3154 if you need additional information.


Javier V. Delgado
Neighborhood Housing and Community Development

Cc:	Laurie Shaw, Capital Metro	Bryan Bomer, AEGB	Hillary Granda, PDRD
	Maureen Meredith, PDRD	Gina Copic, NIICD	Susan Kinel, NIICD
	M Simmons Smith, PDRD	Chris Yancez, PARD	Stephen Castleberry, PDRD
	Kath. Murry, Austin Energy	Heidi Kasper, AEGB	George Zapalac, PDRD
	Robby McArthur, AWU	Danny McNabb, WPDR	Debra Fonseca, PDRD

**ATTACHMENT 11:
Development Team
Resumes**

WALTER J. MOREAU

My vocation the last twenty years has been to work with nonprofit organizations to create high quality, service rich, affordable housing for very low income, Texas families. I have successfully secured subsidy financing worth over \$80 million and provided other development services to create over 2,200 units of service enriched housing.

PROFESSIONAL EXPERIENCE:

EXECUTIVE DIRECTOR, Foundation Communities, Austin, Texas 1997-Present

- Lead one of the premiere affordable housing organizations in the region in pursuit of our mission “to create housing where families succeed”.
- Oversee the development, asset management, property management, and resident services of our growing portfolio of 2,100 units with a market value of over \$90 million. Our properties are places of great community pride and help over 2,000 families save over \$1.5 million in rent annually. I guide a staff of 150 and look after a \$15 million annual budget.

Development

- Overcoming neighborhood opposition and building **Trails at the Park**, a 200 unit family community adjacent to a 350-acre nature park. This \$15 million community includes a 3,200 square foot Learning Center and a beautiful fourplex design. Primary subsidy financing includes 9% tax credits and various grants.
- Purchased and renovated the **Village Green Apartments**, a 200 unit family property. This property underwent a complete transformation from high criminal activity to a safe, quiet environment. Opened a 2,000 square foot Learning Center. This property was financed with a 501(c)3 bond and a Neighborhood Reinvestment grant totaling \$7 million.
- Led the development and successful packaging of over \$14 million from eleven different grants, loans, bonds and tax credits to create the new **Southwest Trails Apartments**, a 160 unit community serving families at rents under the 50% income limit. This is the only new affordable housing developed in the more affluent Southwest Austin and it includes an 18-acre nature area.
- Developed the **Garden Terrace Residences**, the first Single Room Occupancy (SRO) community in Austin, with 85 units and a \$4.5 million capital budget paid for by public and private grants;

Asset and Property Management

- Created a financially self-reliant organization which owns its office building without a mortgage, and has refinanced our housing portfolio mortgages below 7% with fifteen year payoffs;
- Tripled our property management operation to cover 1,200 units, while capping cumulative rent increases under \$30 in six years and serving primarily families below 50% of median income;
- Significantly reduced deferred maintenance at all properties, while increasing our cash reserve balance from one million to three million dollars;
- Changed the name of the organization, creating new marketing materials, and winning selection as a United Way agency;
- Won the Metlife/Enterprise Foundation Award of Excellence in Asset Management for the Sierra Ridge Apartments;

Resident Services

- Fundraise approximately \$400,000 annually for resident service programs and matched this effort with property cash flow;
- Expanded our Learning Centers from one location to eight, managed by twelve professional full-time staff attended daily by over 600 youth and adults attending pre-school readiness, after-school tutoring, computer training, money management courses, ESL/GED, and classes;

- Created an Individual Development Account program with 400 accounts, as well as extensive financial literacy and homebuyer courses. Launched a new State IDA pilot program and SEED program.

DEVELOPMENT & ASSET MANAGEMENT DIRECTOR, Foundation Communities 1994 – 1996

- Secured grants and loans from four public and private sources (\$8.4 million) for the purchase and repair of four communities (731 units). I creatively structured a 0% mortgage with a desegregation lender to create 24 units serving extremely low-income households at the Peters Colony Apartments - a mixed income, suburban community.
- Served as the asset manager of the portfolio prepared and reviewed agency and property budgets, solved daily operations problems, and assisted with the strategic planning of our resident services.

PRIVATE CONSULTANT 1992 – 1994

- Worked with over fifteen nonprofit and public affordable housing organizations on a variety of client challenges. Raised over \$8.5 million in subsidy funds (tax credits, HOME, CDBG, HOPE 2, SRO, and Shelter Plus Care funds) for the development of 446 units in both urban and rural settings.
- Facilitated the sale and financing of four communities (871 units / \$9.2 million in value) from the Resolution Trust Corporation to nonprofit owners.
- Designed a Neighborhood Energy Conservation Program for Dallas Habitat for Humanity.
- Successfully helped the State troubleshoot three nonprofit funded projects that had stalled.
- Wrote two manuals and one technical report for the US Department of Health and Human Services on financial management issues for grantees of the Ryan White Care Act

PROJECT ASSOCIATE, Center for Housing Resources, Dallas, Texas 1990 – 1992

- Developed the concept of the Hillcrest House SRO (64 units) for homeless residents with AIDS, formed the developer partnership, secured the site, and financially packaged a successful Shelter Plus Care application worth \$2.6 million.
- Assisted a private developer in locating a suitable building to develop the first new SRO in Dallas – the Wales SRO (61 units). Secured a Section 8 SRO Mod Rehab grant (\$2.5 million) and low income housing tax credits worth \$450,000 for the project.
- Managed and doubled the size of the Volunteer Home Repair Program serving 250 volunteer home repair work crews annually.

MANAGEMENT TRAINEE, United Way of America 1989 – 1990

- Created a “blueprint” of housing solutions for the Homeless Services Task Force organized by the Community Council of Greater Dallas. Wrote a guidebook for nonprofit agencies on creating fair fee policies. Raised \$300,000 as a part of the United Way of Greater New Orleans campaign.

EDUCATION:

Master of Public Affairs, LBJ School of Public Affairs, University of Texas, Austin, 1994

Bachelors of Arts in Economics, Baylor University, Waco, Texas, 1989

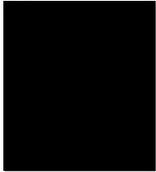
- Phi Beta Kappa, Outstanding Bachelor of Arts Student in Economics

PERSONAL INFORMATION:

- I have been volunteer Board leader with the Neighborhood Capital Corporation, Austin Community Development Corporation, Capital Area Homeless Alliance, St. George’s Court Elderly Housing Community, St. George’s Episcopal Church Vestry, and the National Episcopal AIDS Coalition.
- Proficient in Spanish
- Personal interests include ultimate frisbee, reading, mountain biking, magic and stained glass
- Married with two “high-spirited” sons ages 14 and 11

Sunshine Mathon

M. Arch. First Professional, Specialization in Sustainable Design



References available
upon request

Profile

When I entered graduate school, I was clear that I was doing so as an act of service. My architectural career will take me not to traditional firms, but to service-based organizations and clients, such as Foundation Communities, whose goal is to make a difference.

Experience

Systems & Construction Manager, UT Solar Decathlon 2005; Austin, TX – 2004-2005

Core member of the 2005 UT Solar Decathlon Team. I led the design and construction of the solar electric and solar thermal, plumbing, and HVAC systems for which we won two first place honors. Responsible for overall building energy analysis. Central researcher of sustainable materials, energy efficient appliances, and overall green building strategies. Onsite Construction Manager throughout all construction phases. For more information on the competition see: www.solardecathlon.org.

Computer Lab Teaching Assistant, UT Austin; Austin, TX – 2005-2007

Senior staff member of UT School of Architecture's Computer Lab. Oversaw the maintenance of the lab computers, both PC and Apple. Assisted and taught students with software questions including AutoCAD, Adobe Photoshop, Sketchup, Vectorworks.

Director, Farm & Wilderness Summer Camps; Plymouth, VT – 2000-2003

Created and organized dynamic program of outdoor skills and experiential environmental education for forty 11-15 year old boys in a remote setting. Responsible for hiring and managing seventeen staff. Accountable to multiple constituencies: campers, parents, staff and organization. Managed a seasonal \$65,000 budget.

Senior Computer Sales Consultant, Power Mac Pac; Portland, OR – 1998-2002

Apple Macintosh sales consultant with individual and corporate clients, both local and nationwide. Set company single month sales record of \$250,000.

Photographer, Third Iris Photography; Portland, OR – 2001-2003

Third Iris Photography was a self-run business. I was a freelance photographer with a focus on landscape, travel and detail art images.

Education

Bates College, Lewiston, ME – B.S. Physics, 1995; Magna Cum Laude.

University of Texas at Austin, Austin, TX – M. Arch, First Professional, 2007; GPA: 3.8.

University of Texas at Austin, Austin, TX – Specialization in Sustainable Design, 2007.

UT Honors – Graduate Recruitment Fellowship; Texas Architectural Foundation Scholarship.

Skills

The work experience described above reflects the diverse interests and skills I bring to any position. I am at ease engaging people face to face, working on a computer and swinging a hammer. I have frequently been given positions of significant responsibility and, though I come with broad skill sets, I am also comfortable asking for help or researching answers when I encounter unfamiliar territory.

RESUME

Vicki Beal McDonald

Austin, Texas 78703

Education: Bachelor of Science. University of Texas at Austin 1980

Professional Designation: Member: Certified Commercial Investment Institute (CCIM)

Licenses: Licensed Texas Real Estate Broker

Experience:

For the past twenty five years I have owned and operated Vista Properties, a real estate firm specializing in the management, leasing and brokerage of income producing assets. These assets have included multifamily, office and retail developments. The client base has consisted of private, government and institutional owners. Vista has performed property management and asset management services for a variety of real estate portfolios covering a six state region. Vista has provided construction management services and been involved in the renovation and rehabilitation of rental units, and office and retail finish out. Vista has participated as a real estate Broker in the sale and leasing of over fifty million dollars of commercial real estate.

Membership:

Austin Board of Realtors
Texas Association of Realtors
Texas Apartment Association
Real Estate Council of Austin
Central Texas CCIM Chapter
Commercial Leasing Brokers Association
Commercial Real Estate Women
Women's Chamber of Commerce

Board Involvement:

Chairman: Commercial Investment Division-Austin Board of Realtors
Chairman: Government Affairs Committee-Austin Board of Realtors
Director-Texas Association of Realtors
Member: Community Involvement Committee-Austin Board of Realtors
Member: Nominating Committee-Austin Board of Realtors
Board Member-Central Texas CCIM Chapter (Three years)
Chairman-Central Texas Mutual Housing Association (Two years)
Board Member- Central Texas Mutual Housing Association (Four years)
Chair: Community Service Committee CREW

Awards:

Commercial Investment Division Member of the Year

EDUCATION

Master of Public Affairs, May 2002

LBJ School of Public Affairs, Austin, Texas

- Research Project: "State Sprawl & Open Space"
- Master's Report: "Reinventing S.R.O.'s: Homes for the Single, Working Poor"

B.A. in Journalism, May 1999

Texas Tech University, Lubbock, Texas

- Texas Valedictorian Scholarship
- Hutcheson Endowed Journalism Scholarship

SUMMARY

Education and experience related to the development and finance of high-quality affordable housing. Skills in proposal/grant writing; research and report writing; working with federal, state and local governments; working with non-profit organizations and neighborhood associations. Proficient in Word, Excel, Access, Power Point, Illustrator, Photoshop and PageMaker with both PC and Mac. Motivated team player and builder with excellent communication skills and an ability to work on multiple projects simultaneously as a leader or a team player.

PROFESSIONAL EXPERIENCE

Director of Housing Finance

Foundation Communities, Inc., Austin, Texas

May 2002 – present

- Identify subsidy and conventional financing options for projects – to date have secured grants and loans from public and private sources (\$65 million) for the acquisition and rehabilitation of five communities (733 units) and two learning centers.
- Find projects that fit available funding and development goals.
- Coordinate preparation and completion of funding applications including LIHTC, HOME, CDBG, FHLB, and HUD.
- Review closing documents and coordinate closing process for development projects.
- Plan development criteria and assist with evaluation and negotiation of potential development projects.
- Outline compliance regulations, ensure proper procurement, and act as point of contact for Davis Bacon wage reporting.
- Maintain compliance with tax exemption and CHDO requirements for 13 property portfolio.

Development Associate

Foundation Communities, Inc., Austin, Texas

Sep. 2001 – May 2002

- Assisted with a variety of funding applications for the development of affordable multi-family housing.
- Planned the financing, design, and management of first single room occupancy project in Austin.
- Identified and initiated negotiation on suitable properties for acquisition.

Linenberger Memorial Intern in City Management

Office of City Manager, San Mateo, California

June 2001 – Aug. 2001

- Wrote bi-weekly newsletter to employees, monthly newsletter to the community and City's Annual Report.
- Monitored city operations and reported progress to city staff and community through newsletters and press releases.

State Affairs Assistant

American Insurance Association, Austin, Texas

Aug. 1999 – May 2001

- Researched, tracked, and monitored House and Senate insurance-related bills for an eight state region.
- Composed legislative and regulatory updates, reports, calendars and press releases for distribution to Association members.

Public Relations Director

Office of the Governor, Criminal Justice Division/Task Force Division, Austin, Texas

May 1999-Aug. 1999

- Wrote and produced press releases, presentation scripts, grant reports and agency memorandums for department initiatives.
- Monitored statewide task force activities and reported to CJD executive staff.

Communication Fellow

Office of the Governor, Austin, Texas

May 1999-Aug. 1999

- Scanned national media sources and compiled daily packet of articles on Governor's initiatives and activities.
- Interviewed, trained and supervised new interns.

News Room Reporter

Lubbock Avalanche-Journal, Lubbock, Texas

Jan. 1999 - May 1999

- Generated story ideas, interviewed sources and wrote articles on local events.

PERSONAL INFORMATION

Enjoy traveling, running, cooking and listening to live music.

**ATTACHMENT 12:
Development
Experience**



Foundation Communities

Supportive Housing: Garden Terrace, Spring Terrace, Skyline Terrace & Arbor Terrace

Walter Moreau, Executive Director

3036 S. 1st Street

Austin, Texas 78704

email: walter.moreau@foundcom.org

phone: 512-610-4016

What is supportive housing?

Supportive housing is a successful, cost-effective combination of *permanent* affordable housing with services that helps people live more stable, productive lives. Foundation Communities owns and operates Austin's only supportive housing communities: Garden Terrace, Spring Terrace and Skyline Terrace. These communities target extremely low-income single adults, including persons who are working in low-wage jobs and are unable to afford market rate housing, seniors or persons with disabilities who are receiving SSI and are unable to locate housing within their limited budget, and homeless persons who have shown progress in addressing long-term issues such as substance abuse, mental health treatment, and job training and education. Foundation Communities' supportive housing model provides an efficiency apartment, community spaces, and social service assistance to an income level that is not reached by the traditional housing market.



Garden Terrace - 103 Units

Renovated 2003 – Phase II in 2008

- 50 units are covered by the HUD Section 8 Moderate Rehabilitation SRO Program, administered through the Housing Authority. Units are reserved for homeless persons who pay a third of their income or \$50, whichever is more.
- 38 units are "private pay". Residents are charged a flat rent of \$360, which includes all bills paid.
- 15 units added to Garden Terrace as a Phase II.



Spring Terrace – 142 Units

Renovated 2006

- 20 units are reserved for chronically homeless individuals and are covered by a rent subsidy from HUD's Supportive Housing Program through a partnership with Caritas of Austin. Residents pay a minimum rent or 30% of their income.
- 120 units are "private pay" with a range of rents from \$370-\$535 depending on unit size.



Skyline Terrace – 100 Units

Renovated 2008

- 15 units are reserved for homeless individuals through partnership with Salvation Army and Austin Housing Authority. Residents pay a minimum rent or 30% of income.
- 20 units are reserved for chronically homeless individuals and are covered by rent subsidy from HUD's Supportive Housing Program through partnership with Caritas of Austin. Residents pay minimum rent or 30% of income.
- 65 units are "private pay" with rents from \$390-\$505 based on unit size.



Arbor Terrace – 120 Units

Renovated 2012

- 35 units are reserved for chronically homeless individuals and 15 units are reserved for homeless and covered by rent subsidy from HUD's Supportive Housing Program through partnership with Caritas of Austin. Residents pay minimum rent or 30% of income.
- 70 units are "private pay" with rents from \$370-\$435 based on unit size.

Funding and Income Level

Garden Terrace, Spring Terrace, Skyline Terrace and Arbor Terrace were financed with a combination of grants and loans from governmental sources, as well as funding from individuals, foundations, and corporations (as shown in more detail in the chart).

The result is that Foundation Communities' supportive housing developments reach individuals earning \$24,900 a year (\$12/ hour) or less, which is 50% of median family income. Rents are well under the Fair Market Rent (FMR) for an efficiency apartment in Austin.

	Garden Terrace	Spring Terrace	Skyline Terrace	Arbor Terrace
Funding Sources				
TDHCA (HOME)	1,000,000	786,446	1,450,000	0
TDHCA (Housing Trust Fund – non-federal)	0	682,010	0	0
TDHCA (Neighborhood Stabilization Program)	0	0	0	7,260,289
City of Austin (General Obligation Bonds)	0	0	1,516,850	1,101,066
City of Austin (CDBG)	1,600,000	0	0	898,934
City of Austin (HOME)	175,750	1,079,292	956,003	0
City of Austin (Housing Trust Fund – non-federal)	0	920,708	1,043,997	0
Low Income Housing Tax Credits	0	0	3,969,392	0
NeighborWorks America	464,000	625,000	0	450,000
Federal Home Loan Bank	500,000	350,000	750,000	1,000,000
Foundations/Corporations/Individuals	472,433	289,229	513,096	0
Deferred Project Management/ Fundraising/Development	200,000	450,000	213,648	0
Other	153,817	0	12,000	41,041
TOTAL SOURCES	\$4,566,000	\$5,182,685	\$10,424,986	\$10,751,330

Development Experience – M STATION

FC is a well-respected non-profit developer and long-term owner of 1,862 units of affordable rental housing in Austin. FC has developed a range of housing including scattered site duplexes, multifamily housing with incorporated green space, and mid-rise, higher-density housing for single adults.

M Station – (mixed income family property)

Income Mix:

15 units – < 30% MFI

75 units – < 50% MFI

45 units - < 60% MFI

15 units – < 80% MF (market units)

TOTAL UNITS: 150

Description:

M Station is an innovative family-oriented apartment community that has established the standard for green building and affordable housing in Austin's new Transit Oriented Districts (TODs). This 150-unit new-construction development consists of four residential buildings and two community buildings spread out on 8.5 acres of prime real estate minutes from downtown and the University of Texas. Unique features of the property include a park-like setting along the Boggy Creek greenbelt featuring open green space and trails and a state-of-the-art child care center open to the neighborhood and offering reduced rates for residents.

M Station is a project of "firsts." M Station is the first affordable housing built in one of Austin's new TODs, the first large 9% housing tax credit development for families in Austin since 2004, and the highest scoring LEED for HOMES Platinum certified development in the country. With M Station, our hope was to dramatically reduce the primary portions of a resident family's budget while also achieving an exemplary quality of life: an affordable rent to lower housing costs; a location in the most transit-rich neighborhood in Austin to lower transportation costs; a high-quality, on-site childcare facility to lower child care costs; and a sustainably-designed property to lower utility costs. Ensuring that units at M Station were as healthy and efficient as possible will save our residents much-needed dollars to apply to other areas of their household budgets, contributing to more stable families and neighborhoods.

The development of M Station involved the transformation of a concrete-covered grayfield lot, previously a concrete manufacturing plant's staging lot that has been lying dormant and unused for decades, into a safe, healthy, supportive urban community in the heart of a high-opportunity neighborhood in Austin. Project amenities at M Station include a community building that will host the property leasing office, property management and supportive service staff offices, a computer learning center, a clothes care center, maintenance shop and office space for supportive service programming. A second community building houses the child-care program and the afterschool program. In addition, the property features children's playscapes, a sport court, circuitous internal pathways for walking and biking, multiple green spaces for outdoor gatherings, and pedestrian connections to nearby neighborhood resources.

Development Experience (cont.)

M Station Timeline:

Letter of Intent	December 2008
LIHTC Application	March 2009
LIHTC Award Notification	September 2009
Acquisition	November 2009
LIHTC Commitment	December 2009
Start of Construction	June 2010
Construction Completion	October 2011

M Station Development Budget:

Uses

Acquisition	\$3,001,370
Hard Costs	\$17,690,860
Financing Costs	\$1,041,600
Soft Costs	\$1,047,730
Reserves	\$300,000
Developer Fee	\$2,266,570
TOTAL USES	\$25,348,130

Sources

9% LIHTC Equity	\$13,496,733 (Bank of America as syndicator)
Perm Loan	\$4,999,400 (Bank of America)
City of Austin GO Bonds	\$2,000,000
FHLB Bank of San Francisco	\$1,500,000
NeighborWorks America	\$1,250,000
Austin Community Foundation	\$500,000
Energy Rebates	\$189,000
Home Depot Foundation	\$75,000
Enterprise Green Communities	\$50,000
Enterprise Carbon Offset Fund	\$45,788
FC Reserves	\$890,212
Deferred Developer Fee	\$351,997
TOTAL SOURCES:	\$25,348,130



ATTACHMENT 13:
List of FC Properties

PROJECTS DEVELOPED AND OWNED BY FOUNDATION COMMUNITIES, INC.

Address	# of Units	New or Rehab	Type	Year Completed	Income Mix	Funding
Arbor Terrace 2501 S. IH 35, Austin, 78741 (managed by FC)	120	Rehab	SRO	2012	90 units – 30% MFI 30 units – 50% MFI	Neighborhood Stabilization Program, City of Austin RHDA, FHLB Atlanta AHP, NeighborWorks America, HUD SHP, HUD VASH
Buckingham Place 743-B Yarsa, Austin, 78748 (managed by FC)	164	Rehab	Duplexes	1991	83 units – 50% MFI 83 units – 80% MFI	Conventional Mortgage
Cherry Creek 5510-B Fernview, Austin, 78745 (managed by FC)	122	Rehab	Duplexes	1989	37 units – 50% MFI 85 units -80% MFI	HUD-Insured Mortgage
Crossroads 8801 McCann, Austin, 78757 (managed by FC)	92	Rehab	Apts	1990	14 units – 30% MFI 31 units – 50% MFI 47 units – 80% MFI	City of Austin RHDA, HUD Shelter Plus Care, NeighborWorks America
Daffodil 6009 Daffodil, Austin, 78744 (managed by FC)	40	Rehab	Apts	1996	10 units – 30% MFI 30 units – 50% MFI 30 units – 80% MFI	NeighborWorks America
Garden Terrace 1015 W. William Cannon, Austin, 78745 (managed by FC)	103	Rehab	SRO	2003 and 2008	35 units – 30% MFI 65 units – 50% MFI 3 units - UR	City of Austin RHDA, HUD Section 8 Mod Rehab SRO Program, TDHCA HOME, FHLB Atlanta, NeighborWorks America
M Station 2906 E. MLK, Austin, 78702 (managed by FC)	150	New	Apts	2011	15 units – 30% MFI 75 units=50% MFI 45 units=60% MFI 7 units=80% MFI 8 units=UR	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Enterprise Green Communities, NeighborWorks America, Private Fundraising, Permanent Mortgage
Peters Colony 1810 E. Peters Colony Rd, Carrollton 75007	160	Rehab	Apts	1995	15 units=30% MFI 50 units=50% MFI 48 units=80% MFI 8 units=UR	Conventional Mortgage, Walker Settlement Vouchers w/ Dallas HA
Shadow Brook 2020 S. Cooper, Arlington, 76013	403	Rehab	Apts	1995	201 units=50% MFI 202 units=80% MFI	Conventional Mortgage

Sierra Ridge 201 W. St. Elmo, Austin, 78745 (managed by FC)	149	Rehab	Apts	1991	15 units=30% MFI 128 units=50% MFI 6 units=80% MFI	NeighborWorks America
Sierra Vista 4320 S. Congress Ave., Austin, 78745 (managed by FC)	238	Rehab	Apts	2012	24 units=30% MFI 166 units=50% MFI 48 units=60% MFI	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, NeighborWorks America, Private Fundraising, Permanent Mortgage
Sleepy Hollow 3903 Ichabod Cr, Arlington, 76013	128	Rehab	Apts	1995	64 units=50% MFI 64 units=80% MFI	Conventional Mortgage
Southwest Trails 8405 Old Bee Caves Rd., Austin, 78735 (managed by FC)	160	New	Apts	2001	96 units=50% MFI 64 units=60% MFI	4% LIHTC/Bonds, City of Austin RHDA (and bond issuer), FHLB Dallas, NeighborWorks America
Spring Terrace 7101 N. I-35, Austin, TX 78752 (managed by FC)	142	Rehab	SRO	2006	14 units=30% MFI 126 units=50% MFI 2 units=UR	HUD SHP, City of Austin RHDA, TDHCA HOME and HTF, FHLB Dallas AHP
Skyline Terrace 1212 W. Ben White. Austin, 78704 (managed by FC)	100	Rehab	SRO	2008	72 units=30% MFI 28 units=40% MFI	9% LIHTC, City of Austin RHDA, TDHCA HOME, FHLB San Francisco, NeighborWorks America, Enterprise Green Communities, Private Fundraising HUD SHP, HUD Shelter Plus Care
Trails at the Park 815 W. Slaughter Ln, Austin, 78748 (managed by FC)	200	New	Apts	2000	46 units=50% MFI 104 units=60% MFI 50 units=80% MFI	9% LIHTC, City of Austin RHDA, TDHCA SECO Program, NeighborWorks America, Private Mortgage
Vintage Creek 7224 Northeast Dr, Austin, 78723 (managed by FC)	200	Rehab	Apts	2000	23 units=50% MFI 57 units=60% MFI 120 units=80% MFI	501 c 3 bonds, City of Austin RHDA, NeighborWorks America, HUD Shelter Plus Care
TOTAL UNITS	2,673					

**ATTACHMENT 14:
Operating Proforma**

RENT SCHEDULE

Type	Rent Limit	# Units	# of Beds	Sq. Ft.	Gross Rent	Utility Allowance	Net Rent	Realistic Rent	Rent
50% Rent	50	20	0/1	400	450	0	450	450	9,000
TOTAL		20		8,000					9,000
				2,540					
				10,540					
					(common space)				

STABILIZED OPERATING BUDGET

	Year 1
PROPERTY REVENUE	
Rent Potential	108,000
Vacancy Loss	(8,100)
TOTAL PROPERTY INCOME	99,900

7.50%

EXPENSES (Summary):

	Per Sq. Ft.	Per Unit
ADMINISTRATIVE	0.81	325
MANAGEMENT FEE	0.81	324
PAYROLL	0.00	0
MARKETING	0.07	26
REPAIRS/MAINTENANCE	1.85	738
UTILITIES	2.50	1,000
TAXES	0.00	0
INSURANCE	0.35	140
TOTAL OPER. EXPENSES	6.38	2,553

NET OPERATING INCOME

48,840

REPLACEMENT RESERVES

6,000

NET CASH FLOW (Before Debt)

42,840

STABILIZED OPERATING PROFORMA

Proforma Assumptions	
Revenue Growth	2%
Expense Growth	3%
Vacancy	7.50%

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15
PROPERTY REVENUE							
Rent Potential	108,000	110,160	112,363	114,610	116,903	129,070	142,504
Vacancy Loss	(8,100)	(8,262)	(8,427)	(8,596)	(8,768)	(9,680)	(10,688)
TOTAL PROPERTY INCOME	99,900	101,898	103,936	106,015	108,135	119,390	131,816
EXPENSES (Summary):							
ADMINISTRATIVE	6,500	6,695	6,896	7,103	7,316	8,481	9,632
MANAGEMENT FEE	6,480	6,674	6,875	7,081	7,293	8,455	9,802
PAYROLL	0	0	0	0	0	0	0
MARKETING	520	536	552	568	585	678	787
REPAIRS/MAINTENANCE	14,760	15,203	15,659	16,129	16,613	19,258	22,326
UTILITIES	20,000	20,600	21,218	21,855	22,510	26,095	30,252
TAXES	0	0	0	0	0	0	0
INSURANCE	2,800	2,884	2,971	3,060	3,151	3,653	4,235
TOTAL OPER. EXPENSES	51,060	52,592	54,170	55,795	57,468	66,622	77,233
NET OPERATING INCOME	48,840	49,306	49,766	50,220	50,666	52,768	54,583
REPLACEMENT RESERVES	6,000	6,000	6,000	6,000	6,000	6,000	6,000
NET CASH FLOW (Before Debt)	42,840	43,306	43,766	44,220	44,666	46,768	48,583
SUPPORTIVE SERVICES	9,325	9,605	9,893	10,190	10,495	12,167	14,105
CASH FLOW	33,515	33,701	33,874	34,030	34,171	34,601	34,478
DEBT COVERAGE RATIO	33,515	33,701	33,874	34,030	34,171	34,601	34,478

**ATTACHMENT 15:
Supportive Service
Team Resumes**

JULIAN HUERTA

Austin, Texas 78749

OBJECTIVE

Planning, implementing and evaluating educational opportunities and social services which empower disadvantaged persons to improve their lives.

EDUCATION

Master of Community and Regional Planning, University of Texas at Austin, 1996

Bachelor of Arts; Incarnate Word College, 1987

Major: Political Science Minor: Sociology

EMPLOYMENT EXPERIENCE

Resident Services Director; Central Texas Mutual Housing Association, 1998 to present

Develop and direct educational and asset-building programs that assist families residing in affordable housing communities to increase their self-sufficiency.

Hire, train and supervise professional staff at multiple sites.

Research and author grant proposals to public and private sources to fund resident services.

Collect participation and outcomes data on resident services programs, conduct program assessments, and submit reports to funding agencies, executive director, and board of directors.

Collaborate with other community-based organizations and public agencies to maximize opportunities available to residents.

Executive Director; Literacy Austin, 1996 – 1997

Provided leadership for all programs, hired and supervised staff, and prepared and implemented annual budget in order to achieve agency mission as defined in conjunction with volunteer board of directors.

Directed public relations, community outreach and fund raising initiatives, including proposal writing, corporate and individual solicitations and special events.

Collaborated with other community-based organizations, United Way and Community Action Network partners, and citizen groups to coordinate and maximize services to disadvantaged residents of Travis County.

Information Systems Coordinator; American Institute for Learning Charter School, 1993 – 1996

Collected and analyzed data from multiple education and human service programs and submitted reports to funding agencies, senior managers and board of directors.

Oversaw eligibility determination, assessment and enrollment of participants according to contract requirements.

Hired, trained and supervised Information Systems, Intake and clerical staff.

Participated in the evaluation of agency programs, including designing and conducting research on client outcomes.

Assisted with the development of funding proposals to public and private sources.

Administered local area network, installed and maintained computer software and provided user training and support.

Social Science Research Associate; University of Texas Health Science Center at San Antonio, 1992 - 1993

- Directed fieldwork for research studies of health issues in South Texas, with particular emphasis on Hispanic populations.
- Hired, trained and supervised research interviewers, monitored quality of data collected, and prepared and presented progress reports.
- Developed and maintained relational databases and statistical programs for the management and analysis of data.
- Assisted division faculty with grant writing and monitoring, survey instrument development and testing, and manuscript preparation.

Social Service Worker; Texas Department of Human Services, 1988 – 1992

- Interviewed applicants to determine eligibility for AFDC, food stamps and Medicaid, applying complex state and federal policies and regulations.
- Provided information and answered client questions regarding program benefits and requirements, client rights and client responsibilities.
- Made referrals to other agencies for housing, child care, job training, etc.
- Maintained caseload statistics and completed monthly monitoring reports.

OTHER SKILLS

Proficient with various personal computer software packages, including: Microsoft Word, Excel, FoxPro, FileMaker Pro, PageMaker, SAS and SPSS.

Moderate Spanish-speaking ability.

Marlo Cortez

Austin, Texas 78745

Professional Experience

Front Steps, Inc., Austin Texas

7/04 - present

Keep Austin Housed AmeriCorps Program Coordinator

- Developed and managed all operational program activities and internal reporting methods in accordance with federal regulations and state provisions.
- Developed and managed systems to track performance outcome data and reported on program progress to federal and state entities.
- Established effective partnerships with social service organizations and developed and managed a network of 12 agency partnerships with Keep Austin Housed.
- Coordinated the recruitment, selection, and placement process of 25 AmeriCorps members annually and managed members' service terms.
- Developed and implemented an annual training plan focused on building and strengthening the professional skills of each member and provided supervisory support in members' professional development.

Foundation for the Homeless, Inc., Austin, Texas

7/03 - 7/04

Director of Social Services

- Coordinated and supervised case management services.
- Served as community liaison and collaborated with community service providers to enhance services to the homeless population.
- Acted as lead personnel in evaluating and monitoring program participants' compliance with service plans.
- Maintained program documentation in accordance with agency guidelines and reported outcome data to funding sources.
- Provided field instruction to interns from the UT School of Social Work.

Woodside Trails Therapeutic Camp, Smithville, Texas

1/03 - 7/03

MSSW Student Intern

- Worked with adolescent boys on issues of sexual victimization/perpetration, anger management, abuse, neglect, and addressed a variety of mental health disorders.
- Provided individual, group and family therapy to twelve adolescents and their families.
- Utilized a variety of therapeutic models (Play, CBT, Reality, and Narrative) and techniques.
- Participated in Comprehensive Treatment Plans and Treatment Planning Reviews.
- Coordinated services with Juvenile Probation and Child Protective Services.

Foundation for the Homeless, Inc., Austin, Texas

6/02 - 7/03

Intake Manager

10/97 - 5/02

Passages Case Manager

- Conducted shelter intakes and evaluated family eligibility for agency shelters.
- Facilitated service planning process with homeless families, brokered community resources, administered crisis intervention, and advocated for clients as they worked toward self-sufficiency.
- Supervised Passages Case Managers and oversaw case management program.
- Worked with administrative staff on efforts of program development and volunteer recruitment and trainings.
- Organized and lead effort of data collection and database building to establish comprehensive measurable objectives for agency's service delivery system.

American Institute for Learning, Austin, Texas <i>BSW Student Intern</i>	9/96 - 5/97
<ul style="list-style-type: none"> • Served as counselor intern for GED classroom and the Career Resource Center. • Provided educational and general counseling for culturally diverse, at-risk youth. • Facilitated adolescent male support group (ages 16-18) with an emphasis on gang related topics. • Created and edited student involved newsletter for the Career Resource Center. 	
Helping Our Brothers Out, Inc., Austin, Texas <i>Client Services Specialist</i>	7/93 - 12/95
<ul style="list-style-type: none"> • Administered direct client services and provided crisis intervention to general homeless population. • Developed and maintained database that documented governmental benefits for approximately two thousand clients. • Assisted with recruitment, orientation and supervision of agency volunteers. • Maintained monthly reports for client services, volunteer participation, and community service workers. 	

Education	
Master of Science in Social Work The University of Texas at Austin, Austin, Texas Concentration: Clinical	8/03
Bachelor of Social Work The University of Texas at Austin, Austin, Texas Generalist Practice	5/97

Honors & Affiliations	
<ul style="list-style-type: none"> • Butler Award nominee (Keep Austin Housed) for True Spirit of Collaboration (recipients not yet announced) 	2007
<ul style="list-style-type: none"> • Certified Field Instructor for The University of Texas School of Social Work 	2004
<ul style="list-style-type: none"> • Phi Alpha National Social Work Honor Society 	2003
<ul style="list-style-type: none"> • The Honor Society of Phi Kappa Phi 	2003
<ul style="list-style-type: none"> • Social Services Case Management Network, Executive Committee Member 	2003 - 2006
<ul style="list-style-type: none"> • Caring Forever Award, Community award presented by Shepard of the Hills Presbyterian Church 	2002
<ul style="list-style-type: none"> • Homeless Task Force/Ending Community Homelessness Coalition (ECHO) 	1998 - present

Salary Requirement	
\$50,000	

Tim Miles

Austin, TX 78701

Education

<p>Master of Science in Social Work The University of Texas at Austin Professional Areas of Interest: Religion, & Mental health in the African-American Community; African-American Male Mental Health; Solution-Focused/Short Term Counseling; Blended Management in Permanent Supportive Housing</p>	<p>Master of Theological Studies Harvard Divinity School Harvard University Concentration Areas: Religion & Cultural Criticism; Faith, Civil Rights, & Social Justice; American Christianity & Social Service Administration</p>	<p>B.A. in Liberal Arts Honors The University of Texas at Austin</p>
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Professional Experience

Foundation Communities

Austin, TX

Director of Supportive Services/Project Director - SAMHSA Services in Supportive Housing

November 2009 - Present

Manager - Permanent Supportive Housing

June 2006 – February 2010

Duties include:

- **Overseeing Permanent Supportive Housing Operations:** Management of all operations for a permanent supportive housing/SRO project which provides low-barrier housing for formerly homeless, single adults; Working in a collaborative blended management model to assist formerly homeless individuals successfully maintain permanent housing in a supportive environment; Supervising leasing and maintenance activities maintain at least 98% occupancy, maximize NOI, and ensure compliance with policy regarding operations and 48 hour turnaround time for service requests, as well as securing bids for repairs and replacement work beyond capability of staff; Preparation of budget, and adherence to approved budgets.
- **Overseeing Supportive Services:** Hiring, training, & supervising Supportive Service Coordinators providing direct, on-site services to residents in our permanent supportive housing, SRO communities; Identifying and implementing best practices in supportive services delivery; Establishing partnerships with community service providers to bring in clinical mental health & substance abuse treatment services, health, wellness, and nutrition services, social and personal enrichment activities, rental assistance, and employment readiness services to our residents.
- **Overseeing Grant Compliance:** Management of federal, state, and city grant funding requirements for the HOME, HTF, SAMHSA, HHSP, and CDBG programs; Developing policies and procedures to accurately report outcomes; Working with external program evaluators to collect and analyze data to enhance treatment & service planning success; to Enforcement of agency safety policies & regulations as well as OSHA compliance; ensuring compliance with all local, state, and federal fair housing laws; completing required and requested reports in an accurate and timely manner.

Texas State University – San Marcos

San Marcos, TX

Assistant Director of Residence Life

Adjunct Professor of Counseling/Education

1st Generation Student Programs, P.A.W.S. Alert System, Residential College, & Student Involvement

July 2004 – June 2006

Duties included:

- **Administration of a Campus Residential Community:** Administration of all student life & student services, facilities maintenance and housekeeping, housing assignments, safety & security, counseling, discipline, and judicial affairs, as well as linking and coordinating services through other campus departments, for a campus residential community of just under two-thousand students covering 8 residence halls.
- **Staff Supervision:** Supervision, hiring, recruitment, and training of 5 full-time student affairs professionals (all with master's degrees), 1 graduate student paraprofessional, and an undergraduate student staff of about 70.
- **Co-Curricular Programming & Student Development:** Coordination of the Residential College program which includes direct supervision of Res. College professional staff, administering Res. College admissions process, conducting Residence Life orientation for live-in faculty members, working with academic departments to set up Res. College blocks of 1st and 2nd year

core courses, working with registrar's office to set-up early registration for Res. College students in block courses, and advising students prior to and during registration.

- **Academic Instruction:** Teaching an academic credit course (*Issues in Higher Education [COUN 4378]*) offered through the College of Education, which includes lecturing and facilitating active discussions, hands-on projects and several guest speakers to help students explore the history and philosophy of residence life and higher education, as well as the multiple tasks and responsibilities of residence life professionals and paraprofessionals.

The University of Texas at Austin

Austin, TX

Residence Life Coordinator/Student Affairs Administrator

Division of Housing and Residence Life

August 2001 to July 2004

Duties included:

- Management of student life activities including overall responsibility for meeting student development and housing needs for over 400 residents in an on-campus university residence hall including budget management; social, educational, recreational, and diversity programming; counseling and mediation services for students; and administrative, clerical, and customer service functions;
- Assisting in the administration of facilities maintenance, building safety and security, housekeeping, and room assignment process
- Recruitment, hiring, supervision, training, and development of a Resident Assistant staff of eleven and a student administrative staff of five;
- Recruitment, selection, training, development, and advising of Student Judicial Board and Peer Arbitration Leaders programs;
- Chair of the Resident Assistant Selection Committee for the campus-wide Resident Assistant recruitment and hiring process;
- Chair of the Targeted Academic Guidance project for residents who are struggling academically;
- Chair of the Professional Staff Development project which is responsible for the professional development and training activities for the Residence Life professional staff.

Tri-City Mental Health Center – Adult Systems of Care

Los Angeles County, CA

Program Manager - Quality Improvement, Cultural Competence, Training, and Program Development

August 2000 to August /2001

Fresh Start Housing/Homeless Outreach Case Manager

November 1999 - August 2000

Duties included:

- **Program Development:** Created and managed Client Grievance Program including: serving as initial contact person for agency clients with service complaints; investigation, problem-solving, intervention, and mediation on client/staff disagreements; and reporting to senior management on the status on individual complaints, grievance procedures, and service improvement strategies.
- **Development & Institutional Giving:** Identifying and securing grant funding for multi-cultural training, minority staff recruitment, and community outreach.
- **Diversity Training:** Facilitation of staff development programs in cross-cultural education and cultural competency training;; coordination of Ethnic Specific Services Program to ensure that culturally appropriate services are provided to underserved minority populations; delivery of trainings to staff and community on mental health and spirituality; Development of policies and implementation strategies to comply with statewide cultural competency standards; Co-Chairman of Cultural Competency Committee.
- **Mental health, Substance Abuse, & Housing Direct Service:** Case management for dually diagnosed, chronically mentally ill adults on parole and/or probation whose illness is determined to be a contributing factor to their interaction with the criminal justice system; delivery of intensive support services in assisting caseload to find and maintain appropriate and adequate housing.
- **Service Coordination:** Linkage, advocacy, and facilitation in meeting the health care, employment/training, social service, and mental health needs of a caseload of between 10 to 12.
- **Training & Education:** Facilitation of psycho-educational, life skills, substance abuse, and recreational activity groups.

Tri-City Mental Health Center – Children & Family Services

Los Angeles County, CA

Day Treatment Program Coordinator

November 1998 to November 1999

Duties included:

- **Mental health, Substance Abuse Direct Service:** Coordination and Co-Facilitation of Adolescent Day Treatment Program, including creation and coordination of Adolescent Recreation Therapy Program; Provided case management and mental

health support services for a caseload of approximately 30 children and their families including screening, assessment, supervised diagnosis, psycho-educational counseling, and service linkage.

- **Staff Supervision:** supervision of a professional staff of 1 and paraprofessional staff of 4.
- **Training & Education:** Facilitation and curriculum development of parent's and children's psycho-educational groups on Anger Management, ADD/ADHD, Substance Abuse, and Social Skills.

Gulf Coast Community Mental Health Center

Galveston, TX

Respite & Summer Day Program Coordinator

Mental Health Case Manager

September 1997 to November 1998

Duties included:

- **Direct Service:** Case management & service coordination of mental health services for a caseload of approximately 50 children and their families.
- **Program Coordination:** Administration and management of all activities for children's respite services and summer day camp;
- **Staff/Volunteer Supervision:** Recruitment and supervision of volunteers and staff of 11; Coordination and community outreach activities.

WorldTeach

Windhoek, Namibia (Southwest Africa)

Community Health Education/English Resource Teacher

June 1993 to June 1994

Duties included:

- Carrying out culturally appropriate HIV/AIDS and other public health information;
- English Resource Teacher assisting primary school teachers and administrators in developing public school curriculum in English

U.S. Army

Sergeant

June 1985 – June 1990

Duties included:

- Leading a cavalry squad;
- Served as an Army Ranger;
- Led Drill and Ceremony Training at The Primary Leadership Development Course at Ft. Hood, TX

References Available Upon Request



**Job Description:
Supportive Services Coordinator
SRO Resident Services**

The Supportive Services Coordinator will work one-on-one with residents, develop creative programs and establish and oversee partnerships that support residents in successfully maintaining housing, accessing education and employment services and contributing to a positive sense of community at a permanent, supportive housing facility for homeless and very low-income single adults.

Reports To: Director of Supportive Services

Key Responsibilities:

- Maintain strong communication and cooperation with social services and property management staff and participate as an integral team member in creating a positive living environment at a permanent, supportive housing facility.
- Establish both formal and informal on-going communication with residents, individually and collectively, to determine areas of need, seek input about services and ensure that residents are aware of available programs and resources.
- Establish consistent practices for supporting residents in identifying, discussing and resolving cooperative living, self-care or other problems as they arise, including: coaching, limit setting and, if needed, referral to other social services.
- Effectively assess and diffuse crisis situations that may occur on-site by using de-escalation techniques, calling proper authorities in the event of an emergency, and thoroughly communicating and documenting incidents and outcomes as appropriate.
- Develop creative on-site educational opportunities, social services and community building events based on residents' needs and interests.
- Coordinate services with case managers from the Veterans Administration, ATCMHMR, and other agencies to optimize service delivery to individual residents.
- Identify and establish partnerships with other community-based groups to bring educational, financial, health, and recreational and other services to residents of the property.
- Communicate frequently with Director of Supportive Services and other senior management staff to ensure information flows constantly and in both directions.
- Assist FC staff with fundraising and community awareness activities around supportive housing.

While this list covers the main responsibilities of the job, it is not intended to cover every aspect of the job, and other responsibilities may be assigned.

Minimum Qualifications

- Bachelors Degree in Social Work or related field.
- Minimum of three years of experience providing educational and/or social services to economically disadvantaged adults.
- Experience in mental health, substance abuse and crisis intervention strongly preferred
- Ability to communicate and cooperate effectively with property management staff and representatives from other agencies.
- Demonstrated competence in working with people from diverse backgrounds and ability levels.

**ATTACHMENT 16:
Supportive Service
Budget**

**Supportive Service Budget
Garden Terrace - Phase III**

<u>Sources</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Source</u>	<u>Notes</u>
Cash flow from Operations	\$9,325	\$9,605	\$9,893		
St. David's Foundation (SDF) - Healthy Minds	\$74,025	\$76,246	\$78,533		
Travis County - Justice Reinvestment Initiative (JRI)	\$28,750	\$29,613	\$30,501		
TOTAL SOURCES	\$112,100	\$115,463	\$118,927		
<u>Uses</u>					
Supportive Service Coordinator Salary	\$46,350	\$47,741	\$49,173	SDF	one full-time position
Payroll Taxes	\$3,655	\$3,765	\$3,878	SDF	
Worker's Comp	\$135	\$139	\$143	SDF	
Retirement	\$1,135	\$1,169	\$1,204	SDF	
Health Insurance	\$3,420	\$3,523	\$3,628	Cash Flow	
Supplies/Printing	\$1,000	\$1,030	\$1,061	Cash Flow	
Training/Travel/Mileage	\$1,000	\$1,030	\$1,061	Cash Flow	
Direct Aid - Food Bank	\$2,250	\$2,250	\$2,250	Cash Flow	
Direct Aid - Transportation	\$1,500	\$1,545	\$1,591	Cash Flow	
Direct Aid - Medical	\$3,500	\$3,605	\$3,713	SDF	
Welcome Home Baskets	\$155	\$160	\$164	Cash Flow	household items given to residents upon move-in
Clinical Mental Health Treatment/Prevention Services	\$35,000	\$36,050	\$37,132	SDF/JRI	contracted w/ Lone Star Circle of Care (includes part-time psychiatrist and part-time nurse)
Detox Services (Substance Abuse)	\$3,000	\$3,090	\$3,183	SDF/JRI	contracted w/ Austin Recovery
Inpatient Residential Treatment (Substance Abuse)	\$5,000	\$5,150	\$5,305	SDF/JRI	contracted w/ Austin Recovery
Supported Employment Program	\$5,000	\$5,150	\$5,305	RCOH	contracted w/ Austin Clubhouse
TOTAL	\$112,100	\$115,463	\$118,927		

**ATTACHMENT 17:
MOU with Nonprofit**

Memorandum of Understanding between Foundation Communities and Lone Star Circle of Care For Professional Psychiatric Services Funded by Grants from SAMHSA and/or SDF

Psychiatric Services

Lone Star Circle of Care will provide psychiatric services for residents in Foundation Communities' permanent supportive housing (PSH) communities enrolled in Project HOME under the auspices of the Federal Substance Abuse and Mental Health Administration (SAMHSA) Services in Supportive Housing (SSH) Grant and the St. David's Foundation (SDF) Healthy Minds Grant. The services provided by Lone Star Circle of Care for the grant program include:

- Psychiatric Evaluations
- Psychopharmacological Assessments and Medication Management
- Consultation with Primary Care Providers
- Consultation with SSH and Foundation Communities Supportive Services staff
- Consultation on Integrated Care and Community Mental Health

Lone Star Circle of Care agrees to reserve and make available a psychiatrist who is available solely to residents in Foundation Communities' permanent supportive housing (PSH) communities for four (4) hours per week.

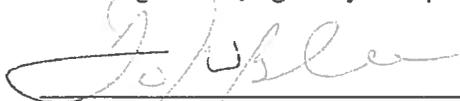
All services will be provided in accordance with the standards mandated by all statutes and licensure requirements of applicable federal, state, and local governing authorities, and proof of up to date licensure and insurance will be provided to Foundation Communities.

Budget & Disbursement of Funds

Foundation Communities shall pay Lone Star Circle of Care *\$680 per week*, in consideration of the reserved 4 hours of professional psychiatric services Lone Star Circle of Care will make available per week to residents. In addition, Foundation Communities agrees to pay Lone Star Circle of Care its Prospective Payment Systems (PPS) rate per encounter with a psychiatrist or therapist when the encounter is provided to residents in Foundation Communities' permanent supportive housing (PSH) communities enrolled in Project HOME funded through grants by SAMHSA and/or SDF who are below 200% of the Federal Poverty Level and have no other payor. Lone Star Circle of Care agrees to not bill or collect from such patients/residents whose encounters are being funded by their enrollment in the SAMHSA grant funded Project HOME made pursuant to this agreement. Payment will be *Due upon Receipt* to Lone Star Circle of Care from Foundation Communities upon receiving a detailed invoice of services provided.

Term of Collaboration

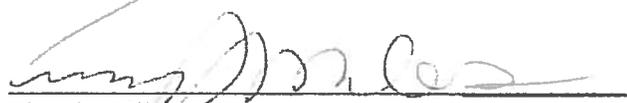
The term of this contract commences on October 1, 2013, and terminates at the end of the federal fiscal year on September 30, 2014. Renewal will be by mutual agreement of both parties at the continuation of the grant, and either may, with 30 days notice, terminate this agreement at any time. This contract may be changed or amended only by written agreement, signed by both parties.



Tamarah Duperyal-Brownlee
CEO & CMO of Clinical Affairs
Lone Star Circle of Care

9/30/13

Date



Timothy Miles
Director of Supportive Services/SSH Program Director
Foundation Communities

9/23/2013

Date

**ATTACHMENT 18:
MBE/WBE Certification**

[New Search](#)

Certified Vendor

Vendor Code: ENC1735650

Vendor Name: ENCOTECH ENGINEERING CONSULTANTS INC

Main contact: ALI R KHATAW

Address: 8500 BLUFFSTONE COVE, #B-103
AUSTIN, TX 78759
Phone: 512-338-1101 Fax: 512-338-1160

E-mail: KHATAW@ENCOTECHENGINEERING.COM

Certification: Minority-Owned Business

End Date: August 06, 2014

Ethnicity: Asian

Category	Commodity Code	Description
Non-professional	90735	Designing Services (Architectural & Engineering NP)
Non-professional	90738	Drafting Services (Architectural & Engineering)
Non-professional	90742	Geotechnical - Soils
Construction	91268	MANAGEMENT, CONSTRUCTION
Non-professional	91819	Buildings, Structures and Components Consulting
Non-professional	91831	Construction Consulting
Non-professional	91842	Engineering Consulting
Non-professional	91891	Roofing Consultant
Non-professional	91893CS	CONSTRUCTION SAFETY CONSULTING
Non-professional	92018	Computer Aided Design Services
Professional	92507	Air Conditioning, Heating and Ventilating Engineer
Professional	92517	Civil Engineering
Professional	92525	DESIGNING
Professional	92531	Electrical Engineering
Professional	92533	ENGINEER SERVICES, PROFESSIONAL
Professional	92534	Energy Management Engineering
Professional	92544	General Construction: Management, Scheduling, Cost
Professional	92546	GEOTECHNICAL - SOILS
Professional	92557	Instrumentation/Engineering
Professional	92567	Mechanical Engineering
Professional	92588	Structural Engineering
Non-professional	95815	Building Management Services
Non-professional	96108	BUILDING MANAGEMENT & OPERATIONS SERVICES
Non-professional	96114	Commissioning of Facilities Services (Functional & Prefuncti
Non-professional	96121	Cost Estimating
Non-professional	96847	Inspection Services, Construction Type

[New Search](#)

Certified Vendor

Vendor Code: VS0000032524

Vendor Name: CIVILITUDE-CJG ENGINEERS, LLC

Main contact: Ross Eubanks

Address: 5121 Bee Caves Rd, Suite 105A
Austin, TX 78746
Phone: 512-306-7226 Fax: 512-306-7240

E-mail: reubanks@cjgengineers.com

Certification: Minority-Owned Business

End Date: March 03, 2014

Ethnicity: Asian

Category	Commodity Code	Description
Professional	925	ENGINEERING SERVICES, PROFESSIONAL
Professional	92519	Concrete Engineering
Professional	92530	Earthquake-Seismic Engineering
Professional	92533	ENGINEER SERVICES, PROFESSIONAL
Professional	92542	Foundation Engineering
Professional	92556	Inspecting, Structural/Engineering
Professional	92588	Structural Engineering
Professional	92594	Tunnels and Subways/Engineering

**ATTACHMENT 19:
Good Neighbor
Checklist**

City of Austin Good Neighbor Checklist

The Neighborhood Housing and Community Development Office (NHCD) offers a Good Neighbor Policy to standardize process and identify expectations for all projects funded through the City of Austin's Rental Housing Development Assistance (RHDA) and Acquisition and Development (A&D) programs. Applicants of these programs are required to prepare and begin implementing a community engagement plan, including neighborhood notification activities. The community engagement plan is required whether the application is for funding for new construction or renovation of an existing building, regardless of whether there is a change in ownership.

A successful community engagement plan leads to open, ongoing two-way communication between developers and neighbors. This requires good-faith efforts and cooperation by developers, City officials and residents. A positive, open dialogue between housing developers and neighbors can prevent misunderstandings, facilitate prompt resolution of any inadvertent misunderstandings, and provide a fair, thoughtful, dependable means of resolving differences.

The following checklist of items is required of all applicants for funding:

(1) Preliminary Research

- Review the Neighborhood Plan (if applicable)

NOTE: There is no neighborhood plan in place for the neighborhood that contains the site.

(2) Neighborhood Notification

- Notify property owners within at least 500 feet of the site and registered neighborhood organizations with boundaries included in the proposed development site, using a written notice, letter or flyer.

NOTE: A zoning change was approved for the development. Please see zoning notice sent to neighbors.

(3) Pre-Application Engagement

- Contact neighborhood organizations to provide current information about the project, including any neighborhood association whose boundaries are included in the proposed development site and Neighborhood Planning Contact Team (if applicable). *(see full City of Austin Good Neighbor Guidelines for more detailed information on what kind of information may be appropriate to share)*

NOTE: Contact was made with Far South Austin Neighborhood Association.

- Appoint a Single-Point-of-Contact (SPOC) to serve as the liaison for exchanging information.

NOTE: Walter Moreau, Executive Director of Foundation Communities, is SPOC.

(4) Application requirements

- Provide communications plan ATTACHED
- Provide documentation showing the content of the notice, and proof of delivery ATTACHED
- Provide signed copy of this checklist. ATTACHED

I have reviewed and completed all of the above checklist items required by the City of Austin's Good Neighbor Guidelines.

 WALTER MOREAU
Signed printed name date 12/11/13



NOTICE OF PUBLIC HEARING FOR REZONING

Mailing Date: 07/19/2013

Case Number: C14-2013-0077.SH

Este aviso le informa de una audiencia pública tratando de un cambio de zonificación dentro de una distancia de 500 pies de su propiedad. Si usted desea recibir información en español; por favor llame al (512) 974-7668.

The City of Austin has sent this letter to inform you that we have received an application for rezoning of a property. We are notifying you because City Ordinance requires that all property owners within 500 feet, residents who have a City utility account address within 500 feet, and registered environmental or neighborhood organizations whose declared boundaries are within 500 feet be notified when the City receives an application.

Project Location:	1015 W. William Cannon Drive
Owner:	Garden Terrace Housing Corporation, Vicki McDonald, (512) 447-2026
Applicant:	Austin Community Design and Development Center, Michael Gatto, (512) 220-4254

Proposed Zoning Change:

From: MF-2-CO – Multifamily Residence (Low Density) district is intended to accommodate multifamily use with a maximum density of up to 23 units per acre, depending on unit size. This district is appropriate for multifamily residential areas located near single-family neighborhoods, and in selected areas where low density multifamily use is desirable. CO – Conditional Overlay combining district may be applied in combination with any base district. The district is intended to provide flexible and adaptable use or site development regulations by requiring standards tailored to individual properties.

To: MF-2-CO – Multifamily Residence (Low Density) district is intended to accommodate multifamily use with a maximum density of up to 23 units per acre, depending on unit size. This district is appropriate for multifamily residential areas located near single-family neighborhoods, and in selected areas where low density multifamily use is desirable. CO – Conditional Overlay combining district may be applied in combination with any base district. The district is intended to provide flexible and adaptable use or site development regulations by requiring standards tailored to individual properties.

Nature of the Rezoning Request: The Applicant is proposing to change the Conditional Overlay that applies to the property. The specific changes requested are to remove the 22 foot height limit and floor-to-area ratio, and modify the number of units and dwelling units per acre to allow for a total of 123 units on the property.

This application is scheduled to be heard by the Zoning and Platting Commission on August 6, 2013. The meeting will be held at City Hall Council Chambers, 301 West 2nd Street beginning at 6:00 p.m.

This application is scheduled to be heard by the City Council on August 29, 2013 at City Hall Council Chambers, 301 West 2nd Street beginning at 2:00 p.m.

You can find more information on this application by inserting the case number at the following Web site: https://www.ci.austin.tx.us/devreview/a_queryfolder_permits.jsp. If you have any questions concerning the zoning change application please contact, Wendy Rhoades of the Planning and Development Review Department at 512-974-7719 or via email at wendy.rhoades@austintexas.gov and refer to the Case Number at the top right of this notice. The case manager's office is located at One Texas Center, 5th Floor, 505 Barton Springs Road, Austin, Texas. You may examine the file at One Texas Center between the hours of 7:45 a.m. and 4:45 p.m., Monday through Friday.

For additional information on the City of Austin's land development process, please visit our web site at: www.austintexas.gov/development.



ZONING

ZONING CASE#: C14-2013-0077.SH

-  SUBJECT TRACT
-  PENDING CASE
-  ZONING BOUNDARY



1" = 200'

This product is for informational purposes and may not have been prepared for or be suitable for legal, engineering, or surveying purposes. It does not represent an on-the-ground survey and represents only the approximate relative location of property boundaries.

This product has been produced by CTM for the sole purpose of geographic reference. No warranty is made by the City of Austin regarding specific accuracy or completeness



COMMUNICATIONS PLAN

GOOD NEIGHBOR CHECKLIST – COA

Garden Terrace Phase III - 1015 W. William Cannon, Austin, TX 78745

Garden Terrace is located within the boundaries of the Far South Austin Community Association. Walter Moreau, Executive Director of Foundation Communities, made contact with Betty Edgemond to discuss the zoning application for Garden Terrace Phase III and the new construction of the additional 20 units at the project site. Foundation Communities has worked with Betty Edgemond, as the main contact for the Far South Austin Community Association, for over 10 years. We sought her input on the initial Garden Terrace project and the Phase II. We confirmed with Betty that the Far South Austin Community Association was the only active neighborhood organization that would pertain to the Garden Terrace.

Betty knows that she can call Walter Moreau at anytime to discuss any issues with the operations of Garden Terrace or the development of Garden Terrace Phase III. Betty and the Far South Austin Community Association will be invited to the Grand Opening of Garden Terrace Phase III , and as always, will acknowledge their continued support of our work.

**ATTACHMENT 20:
Commitment Letter**



3036 South First Street
Austin, TX 78704

tel: 512-447-2026
fax: 512-447-0288

www.foundcom.org

December 11, 2013

Betsy Spencer
Austin Housing Finance Corporation
1000 East 11th St., 2nd Floor
Austin, TX 78702

RE: Garden Terrace Phase III
1015 W. William Cannon
Austin, TX 78745

Dear Betsy:

Foundation Communities, a mission driven charitable nonprofit, is committed and fully prepared to provide a commitment of funding to the Garden Terrace Phase III development to bridge the award and disbursement of a FHLB Affordable Housing Program award in the amount of \$350,000. FC will be paid back when the FHLB AHP award is disbursed.

Foundation Communities (FC) has committed and provided the necessary gap financing required for many of its past projects including the following owner's contributions:

Spring Terrace- \$600,000
Skyline Terrace - \$850,000
M Station – \$2,000,000
Sierra Vista – \$1,000,000

FC is able to make these owner's contributions due to its strong history of fundraising and fiscal responsibility. FC has recently taken advantage of the historically low interest rates and refinanced two of the properties in its portfolio to create a Development Impact Fund to support future development projects. This opportunity has provided FC a funding reserve in excess of \$9 million, which can be leveraged with City funding to further its mission of providing first class affordable homes and supportive services.

Finally, Foundation Communities' maintains a healthy cash reserve funded from 20 plus years of conservative financial management and opportunity-based development decisions to support the development of new properties.

Please feel free to contact me with any questions at (512) 610-4016.

Sincerely,

Walter Moreau
Director, Foundation Communities, Inc.



a Partner Agency of



United Way Capital Area

