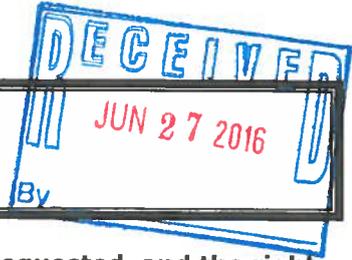


RENTAL HOUSING DEVELOPMENT ASSISTANCE (RHDA)
Application for Rental Development Financing



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 2014-15 Action Plan goals and policy direction from the Austin City Council.

Project Name: Booth Village Apartments
Project Address: Radam Lane (West of South Congress) Zip Code: 78745
Total # units in project/property: 40 Census Tract Number: 48453001308
Total # units to be assisted with RHDA Funding: 40 City Council District Number: 3
Project type (check all that apply with an 'X'):

Acquisition Rehabilitation | New construction Refinance Rent Buy-Down

Amount of funds requested: \$4,000,000 Terms Requested: 40 yr, 0% interest, forgivable

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).

The Salvation Army, Austin Metropolitan Area Command
Name

Developer Consultant/Other
Applicant is (please check appropriate box):

10711 Burnet Road Ste. #231
Street Address

Austin TX 78758 512-782-8800
City State, Zip Telephone

Kathleen Ridings 512-634-5916 kathleen.ridings@uss.salvationarmy.org
Contact Person Contact Telephone E-mail address

[Redacted] [Redacted]
Federal Tax ID Number D-U-N-S Number (REQUIRED - Visit www.dnb.com for free DUNS#)

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.

The Salvation Army, a Georgia Corporation
Legal Name of Developer/Entity

Anthony T. Julian
Signature of Authorized Officer

Texas Divisional Secretary for Program
Title

6/22/16
Date

**Rental Housing Development Assistance
Application for Rental Development Financing**

Booth Village Apartments

Austin, TX

Application Form

KATHLEEN RIDINGS

Director of Social Services



**DOING
THE MOST
GOOD™**

Austin Metropolitan Area Command

501 E. 8th Street

Austin, TX 78701

p: 512.634.5916 f: 512.476.2695

kathleen_ridings@uss.salvationarmy.org

From: Potter, David
Sent: Tuesday, September 13, 2016 11:12 AM
To: Cardino, Sherry
Subject: FW: Booth Village Application
Attachments: Square One_Design Fee Overview Letter 160829_2.pdf;
RHDA_App__Scoring_Criteria_FY14-15 REVISED 160906 OPERATING PROFORMA
CORRECTED.pdf; MBE Certificate - Austin Square One.pdf

From: Andrew.Kelly@uss.salvationarmy.org [mailto:Andrew.Kelly@uss.salvationarmy.org]
Sent: Thursday, September 08, 2016 4:12 PM
To: Potter, David <David.Potter@austintexas.gov>
Cc: Morgan, Ellis <Ellis.Morgan@austintexas.gov>; Kathleen.Ridings@uss.salvationarmy.org
Subject: Booth Village Application

Good Afternoon,

Thank you for your continued interest in The Salvation Army and our plans for assisting people in our community with their housing needs.

In response to the questions raised, please find our response in red below.

Please let me know if you need any additional information.

Thank you for this opportunity.

Project Budget

On page 10 of 20, the Project Budget, the Architectural/Engineering fees are budgeted for \$698,988 (\$49,000 during pre-development and \$647,988 afterward) or \$17,425 per unit. In reviewing other applications AHFC has received and funded, Architectural/Engineering fees are usually in amounts that are under \$10,000 per unit. We need to understand why this amount is significantly higher than what we normally see.

Response - There was some confusion in the initial preparation of the budget submitted and there were items that are not actually architectural/engineering fees that were mistakenly included on that line previously that have now been moved including: Project Management fees; Permit/Inspection/Tap fees; and estimated Rail Road Easement/Construction. The total budget amount is unchanged. Please see letter attached from Square One Consultants. As you will see in the attachment, the total architectural and Engineering design fees per housing unit calculates to \$9,970 per housing unit which also factors in the design fees for the amenities/office building.

Operating Proforma

On page 12 of 20, the Operating Proforma, there is a math error in the annual rental income for the 3-Bedroom Units. At \$600 per month for 10 units, the annual rental income should be \$72,000 and not \$7,200. Using the correct amount will have a dramatic, positive effect on Cash Flow and will also allow for funds to be budgeted for Maintenance Reserves, critical to the ongoing viability of a rental development. Please revise and resubmit this page with the correct Annual Rental Income amount and provide for an annual amount of funding in the Maintenance Reserve line item.

Also, assumptions that income and expenses will both increase 3% each year are not the norm. We believe a more realistic and conservative assumption would be that income will increase 2% each year and expenses will increase 3%

each year.

Response: Please find attached the adjusted Operating Proforma. We have corrected the math error in the Operating Proforma and we have included a \$300 per unit per annum maintenance reserve. The operating proforma is now showing strong cash flow which will either be used to employ more staff at the property or to offer more enhanced supportive services. As you know The Salvation Army will operate this property at or slightly above breakeven and will invest most of the property's excess resources (if any) back into the development as opposed to taking distributions of cash flow.

We anticipate that the increase of income for the subsequent years will be 2% and expenses 3%.

Sources and Uses

If you have an update on the status of The Salvation Army's application to the Federal Home Loan Bank and any additional sources of funding, please advise.

Response: We have included \$1 Million in the budget to be funded from the Federal Home Loan Bank. We are still planning on making the application for these funds, however, we will not begin the process for these funds until we are more clear on the construction timeline. We have contracted with a grant writer who is supporting us in this effort and have developed a strategy based on our banking relationships to seek the \$1 million grant.

As far as additional sources, we are anticipating the following:

Owner Equity (Land)	\$1,570,000
Individual Donors and Private Foundations	\$ 980,000

Foundations we plan to approach include the Rathgeber Foundation, Hammill Foundation, and Anderson Foundation.

We currently have more than 100,000 donors on our Austin database who continue to support the work of The Salvation Army and we plan to leverage these relationships to complete the funding for our project.

Use of Minority or Women-owned Business Enterprise

The application, as AHFC staff has calculated it, is 2 points below threshold. Therefore, if The Salvation Army or the General Contractor could commit to using a City of Austin-certified MBE/WBE on the project, and identify MBE/WBE company intended to be included in the Development Team, the 5 points earned for that scoring criterion would take the application score above threshold. Again, MBE/WBE's must be registered as such with the City of Austin to get the 5 points. Also, I would point out the eligible types of businesses include not only the construction trades, but title companies, accounting firms, and attorneys to name a few. The City's MBE/WBE registry can be searched here: https://www.austintexas.gov/financeonline/vendor_connection/search/vendors/certvendor.cfm

Response: The Project Managers for our projects is Square One Consultants who, themselves, are recognized by the City of Austin as a Minority Owned Business Enterprise. Please see attached their MBE Certificate. We anticipate that this will help us to reach the City's threshold in this matter.

Please call my cell phone to let me know if you have any recommended adjustments.

Thank you and God bless,

Andrew Kelly, Major
AREA COMMANDER
The Salvation Army
Austin, Texas
P. (512) 634-5901
C. (512) 680-9977

From: "Potter, David" <David.Potter@austintexas.gov>

Date: August 25, 2016 at 3:24:30 PM CDT

To: "Henry.Gonzalez@uss.salvationarmy.org" <Henry.Gonzalez@uss.salvationarmy.org>

Cc: "kathleen.ridings@uss.salvationarmy.org" <kathleen.ridings@uss.salvationarmy.org>, "Morgan, Ellis" <Ellis.Morgan@austintexas.gov>

Subject: Booth Village Application

Hi, Col. Gonzalez –

The Austin Housing Finance Corporation (AHFC) appreciate receiving The Salvation Army's application for Booth Village. Staff of the has reviewed the application and has found some items that need further clarification or correction.

Project Budget

On page 10 of 20, the Project Budget, the Architectural/Engineering fees are budgeted for \$698,988 (\$49,000 during pre-development and \$647,988 afterward) or \$17,425 per unit. In reviewing other applications AHFC has received and funded, Architectural/Engineering fees are usually in amounts that are under \$10,000 per unit. We need to understand why this amount is significantly higher than what we normally see.

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here: https://www.austintexas.gov/financeonline/vendor_connection/search/vendors/certvendor.cfm

Again, AHFC appreciates receiving the application and looks forward to The Salvation Army's response.

David Potter

David Potter

Neighborhood Development Program Manager

City of Austin/Austin Housing Finance Corporation

1000 East 11th Street, 2nd Floor

Austin, TX 78702

(mailing address: P.O. Box 1088, Austin, TX 78767-1088)

512-974-3192



August 29, 2016

The Salvation Army
Attn: Major Andrew Kelly
10711 Burnet Rd, Ste
Austin, TX 78758

RE: City of Austin Grant Funding;
Family Transitional Housing

Dear Major Kelly,

We have reviewed the comments from the City of Austin regarding the Design costs for the Family Transitional Housing project at 4216 South Congress Avenue, Austin, TX 78745. To help clarify the question on the budgeted amounts for Design, I am providing an updated project budget which has Architectural and Engineering design fees broken out separately. The total Architectural and Engineering design fees per housing unit calculates to \$9,970 per housing unit which also factors in the design fees for the amenities/office building. The Project Management fees and Permit, Inspection, Tap/Meter fees have been moved to the Hard Costs section. Also, the Rail Road Crossing Easement amount was broken out and moved to the Acquisition section.

We also would like to mention that the project design includes an amenities/office building which accounts for approximately 12% of the total project square footage. This may be a larger portion than typical multi-family projects but is necessary as The Salvation Army provides more resident services and community engagement activities than a typical facility. Although we feel we are proposing a durable and economical facility that will provide housing and services for those with the most need, this larger amenity/office building will proportionally increase the construction and design costs when reviewed on strictly a per housing unit basis.

Please feel free to contact me with any additional questions or comments regarding the City of Austin housing grant application.



Sincerely,

Glenn Hart
Project Manager
ghart@sq1.us
512-751-2830

*The City of Austin
Small & Minority Business Resources Department affirms that*

Square One Consultants, Inc.

meets all the criteria established by the City of Austin Minority-Owned and Women-Owned Business Enterprise-Procurement Program and is certified as a

Minority-Owned Business Enterprise

by the City of Austin.



Veronica Briseño Lara, Director
Small & Minority Business Resources Department

VENDOR CODE: **SQU8302982**

EXPIRATION DATE:
03/25/2018

Certification is valid for three years, contingent upon the City receiving an affidavit of continued eligibility each year. Verification of certification status can be obtained by calling (512) 974-7645.

CONSIDER SMOKE-FREE HOUSING

The City of Austin encourages the development of smoke-free rental housing. Smoke-free housing protects the health of residents by decreasing exposure to harmful secondhand smoke. Also, apartment owners and managers reap the benefits of more efficient and less expensive unit turnovers, potentially lower insurance premiums, and reduced risk of fires.

Smoke-free policies are legally permissible and can be a marketing advantage for attracting and retaining residents. More than 80 percent of people living in the Austin area do not use tobacco, and a 2011 survey conducted by the Austin/Travis County Health and Human Services Department found that 77 percent of renters in Travis County would prefer to live in tobacco-free housing.

Find out how you can protect the health of residents, make your property safer, and save money by downloading a copy of "A Manager's Guide to Smoke-Free Housing Policies" at: <http://www.livetobaccofreeaustin.org/owners.php>.

Please answer the following questions.

Is this development intended to have restrictions on smoking? Yes No

If "Yes," what level of restriction is intended?

No smoking anywhere on the property, inside or outside

No smoking Inside residents' units

No smoking in outdoor exclusive use areas such as individual balconies or patios

No smoking in outdoor common areas such as pool, parking lot, green spaces, etc.

No smoking outdoors within a reasonable distance from building entrances (such as 15 - 25 feet) to prevent smoke from entering another resident's open windows or doors.

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

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

B. For-profit applicants/developers, attach copies of the following:

1. For Corporations, Limited Partnerships, and Limited Liability Companies, a copy of a "certificate of status" issued by the Texas Secretary of State.
2. A current financial statement
3. Proof of sufficient reserves or a line of credit available, if necessary, in order to complete the proposed project.

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. Numbers of proposed PSH Units:

40 Total Number of Units in project

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

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

1. _____ Persons needing "**Housing First**," a Permanent Supportive Housing model typically designed for individuals or families who have complex service needs, who are often turned away from other affordable housing settings, and/or who are least likely to be able to proactively seek and obtain housing on their own. Housing First approaches also include rapid re-housing which provides quick access to permanent housing through interim rental assistance and supportive services on a time-limited basis.

NUMBER OF UNITS _____

Individuals or families headed by individuals that are:

2. **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 _____

3. _____ 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 _____

4. _____ 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 _____

5. _____ 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 _____

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

NUMBER OF UNITS _____ 5 _____

NOTE: APPLICANTS CHECKING B.1, B.2, B.3, or B.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.

The target population of The Salvation Army Austin, Booth Village Apartments, is families with children experiencing homelessness with priority given to veteran families. Families must meet the HUD definition of homelessness as defined in the HEARTH Act and have resided in emergency shelter a minimum of seven days. 88% of the property (35 of 40 units) will be designated for transitional supportive housing and will serve families who are 50% of the Area's Median Income (AMFI) or below. 12% (5 of 40 units) will be designated as permanent supportive housing (PSH) and will serve families who are 30% AMFI or below. Since The Salvation Army (TSA) is the primary provider of emergency shelter for families with children in the Central Texas area, it is anticipated that most of the applicants will be recruited from the Austin Shelter for Women and Children and TSA Social Service Center Family Residence. Other likely referral sources may include SafePlace, Foundation for the Homeless and Casa Marianella. Both transitional and permanent supportive housing will prioritize veteran families who are literally homeless according to HUD's definition.

It is anticipated that the majority of applicant households will be headed by single women and include two to three children. Nearly 50% of children are expected to be age 5 or younger. Race/ethnicity of families is expected to be approximately 54% African-American, 35% Hispanic, 10% White and 1% Other. Approximately 43% of adults are expected to be aged 34-55, 39% 25-36, 9% 18-24, and 9% over 55 respectively. Fewer than 20% are expected to be headed by single men or include two parents. Most will be single women who are the sole source of support for their children. Historically, many have had serious problems i.e. chemical dependency, domestic violence, unemployment, lack of education, and disabling mental health and physical conditions that have contributed to their homelessness. In addition, applicants may have barriers to self-sufficiency (i.e. prior eviction and/or utility debt, criminal histories, credit problems,) ranging from moderate to severe. Booth Village Apartments will have 4 units (10% of the property) that are accessible to persons with mobility disabilities and one unit (2% of the property) that will be accessible for persons with hearing and/or visual disabilities.

To be considered for Permanent Supportive Housing (PSH), families must have met the HUD criteria for chronic homelessness as established in the HEARTH Act. PSH applicant families will be considered for entry through the Coordinated Assessment process coordinated by the Continuum of Care. The property will accept VASH vouchers through the Dept. of Veterans Affairs for veteran families as well as other forms of subsidy such as HUD Shelter Plus Care.

Families will work with a case manager to increase their skills and income while in transitional housing toward the goal of obtaining permanent affordable housing after 12 months. Families in PSH units will work toward

attaining and maintaining financial and housing stability within the limitations of their disabling conditions. Services will focus on the needs of the entire family with emphasis on supporting the educational needs of children and connecting the family to mainstream income, employment, and health resources.

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

This development is a multi-family development, consisting of 40 units in several buildings, the exact number of which is still to be determined. The garden-style buildings are walk-ups and are situated in a way to maintain a great deal of green space on the site, which includes a cluster of heritage trees.

The unit mix will be as follows although it is subject to change as the architectural plans are developed further.

5 one bedroom/one bath units at approximately 550 square feet
25 two bedroom/one bath units at approximately 850 square feet
10 three bedroom/two bath units at approximately 935 square feet.

Total net rentable square footage is estimated to be approximately 33,350.

- c. Indicate whether the property is occupied at the time this application is being submitted.

The property is currently undeveloped.

- d. Indicate whether the project meets the requirements of the City's Vertical Mixed-Use (VMU) Ordinance, or is in a Planned-Unit Development (PUD) or Transit Oriented Development (TOD), or is located less than .25 miles from a transit stop (not just a transit route).

This site is located approximately .25 miles from several bus stops. There is one located at on South Congress and Radam Lane, and another located on South First and Radam.

- e. Indicate whether the project will preserve existing affordable rental units.

Not applicable.

- f. If there are existing structures, provide documentation from the taxing authority or another third-party source indicating the year the structure was built.

Not applicable.

- g. Indicate the number of units reserved for Housing Choice Voucher holders (Section 8).

The property will accept vouchers from a variety of sources.

- h. Indicate the number of units that are or will be made accessible and adaptable for persons with mobility, sight or hearing disabilities.

Five percent of the units will be designed for people with physical disabilities and another 2 percent for people with sensory impairments.

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

Once an architect is selected, the development team will undergo a thorough review of the Neighborhood Plan and will comply with all requirements.

- 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 development budget is \$7,570,054, of which \$4,000,000 is requested from AHFC, \$1,570,000 consists of a land donation from TSA, and \$1,000,000 is from the Federal Home Loan Bank Affordable Housing Program, and \$1,000,054 is from various foundations and other TSA donors. The request City of Austin funds

will be used for predevelopment expenses in the amount of \$59,000, for architect and engineering fees of \$647,988, and for hard costs in the amount of \$3,293,012.

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.

See map attached in Tab 2.

- l. A flood plain map generated by www.ATXFloodPro.com with the property parcel identified and the legend displayed showing the various types of FEMA Flood Plain zones.

See map attached in Tab 2.

- 5. **Site Control and Demonstration of Value.** Include evidence of site control such as a warranty deed or a current earnest money contract, and provide a real estate appraisal or current tax documentation that substantiates the value of the property.

See warranty deed attached in Tab 3.

- 6. **Zoning.** Include a letter from the City of Austin's Planning and Development Review Department (PDRD) verifying that the current zoning of the site for the proposed project is compatible with the anticipated use, or include documentation verifying that a request to change current zoning has been submitted to PDRD. Should the project be approved for funding, the appropriate zoning must be in place prior to execution of loan documents.

A description of the current zoning is included in Tab 4.

- 7. **S.M.A.R.T. Housing™.** Include a copy of the letter that indicates the project has been reviewed and meets S.M.A.R.T. Housing™ requirements.

This item is addressed in Tab 5.

- 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.

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

- a. project management,
- b. market analysis,
- c. site selection and control,
- d. planning and construction,
- e. design, architecture and engineering,
- f. legal and accounting,
- g. federal funding rules and
- h. other funding source rules (e.g. Low Income Housing Tax Credits).

	Name and Contact Information	MBE? (Mark X if Yes)	WBE? (Mark X if Yes)	Non- profit? (Mark X if Yes)
Owner	The Salvation Army, A Georgia Corporation			X
Developer	The Salvation Army, Austin Area Command			X
Architect	Square One			
Engineer	TBD			
Construction Lender	N/A			

Other Lenders	N/A			
Attorney	TBD			
Accountant	TBD			
General Contractor	The Burt Group			
Consultant (if Applicable)	DMA Development Company, LLC			
Property Management Provider	The Salvation Army, Austin Area Command			X
Other: Owner Rep	Square One Consultants			

The Salvation Army has assembled its development team for this project. TSA is also consulting with Foundation Communities and DMA Development Company, LLC as it plans for development and management/operation of Booth Village Apartments. Both DMA and Foundation Communities have extensive experience in the development, construction and operations of multifamily affordable housing and are well versed in the City of Austin’s requirements in terms of ongoing compliance. TSA will rely heavily on these two firms throughout the process.

TSA will also rely heavily on the owner’s representative, architect and contractor that it has selected for this development. Square One Consultants will serve as a full service Owner Representative for this development. Square One will provide analysis, consultation and coordination for every aspect of this project, including structuring, planning, zoning, budgeting, designing, financing, coordinating, and more. Kevin Fleming, the principal assigned to this development, has 35 years of experience in the industry and is highly proficient in the Project Management/Owner Representation field based on his degree in architectural engineering and prior experience at Lincoln Property Company. Please see Tab 6 for a more complete corporate profile.

The architect, O’Connell Robertson, is also a highly experienced firm. Since 1950, O’Connell Robertson has completed more than 1,500 projects, ranging from small renovations to new multi-million dollar facilities planned to specifically support each project’s unique goals. As a full-service firm offering architecture, engineering and interior design, O’Connell Robertson offers a single source solution. O’Connell Robertson has extensive experience in designing both commercial and residential buildings, and has extensive experience in Austin. Please see Tab 6 for a more complete corporate profile.

The Burt Group will serve as the General Contractor. The Burt Group has worked with O’Connell Robertson on several occasions and likewise has extensive commercial and residential experience. The Burt Group specializes in completing top quality construction with maximum efficiency and minimum time through careful planning in the pre-construction phase and assigning staff to particular projects based on their specific experience and familiarity with this type of work. The goal of every project is to bring the best possible construction resources to bear. Please see Tab 6 for a more complete corporate profile.

- 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)
Acquisition and/or holding	N/A
Environmental and/or historic review (AHFC)	
Securing and packaging project financing	October 2016
Construction Specifications and Cost estimates	June 2017
Construction Bids	August 2017

Construction Start	September 2017
Anticipated Draws (list all)	Monthly for 6 months
End Construction	March 2018
Start of Rent-up	March 2018
Completion & Operation	April 2018

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.

- ____38__ Units adaptable for persons with mobility disabilities
- ____2__ Units accessible for persons with mobility disabilities
- ____39__ Units adaptable for persons with sight and hearing disabilities
- ____1__ 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.

The Salvation Army, a Georgia Corporation, has a long history of providing HUD supportive housing, transitional and permanent supportive housing as well as newer initiatives in the area of rapid rehousing. Listed below are examples of the Army's expertise in housing for senior citizens, residents and rapid/transitional, permanent housing programs in the Southern Territory of The Salvation Army.

Senior Residences

1. Atlanta, GA 30306: William Booth Towers, 1125 Ponce de Leon Ave NE (99)
2. Charlotte, NC 28202-1727: William Booth Gardens Apts, 421 North Poplar St (130)
3. El Paso, TX: 79903-2840: Pleasant View Lodge, 3918 Bliss Ave (acc 22)
4. Fort Worth, TX 76119-5813: Catherine Booth Friendship House, 1901 E Seminary Dr (157)
5. Gastonia, NC 28054: Catherine Booth Gardens Apts, 1436 Union Rd (82)
6. High Point, NC 27263: William Booth Gardens Apts, 123 SW Cloverleaf Place (77)
7. Houston, TX 77009: William Booth Gardens Apts, 808 Frawley (62)
8. Ocala, FL 34470: Evangeline Booth Gardens Apts, 2921 NE 14th St (64)
9. Orlando, FL 32801: William Booth Towers, 633 Lake Dot Circle (168)
10. Orlando, FL 32801: Catherine Booth Towers, 625 Lake Dot Circle (125)
11. Pasadena, TX 77502: Evangeline Booth, 2627 Cherrybrook Ln (62)
12. San Antonio, TX 78201-5397: William Booth Gardens Apts, 2710 W Ashby Pl (95)
13. San Antonio, TX 78201: Catherine Booth Apts, 2810 W Ashby Pl (62)
14. Tyler, TX 75701: William Booth Gardens Apts, 601 Golden Rd (132)
15. Tyler, TX 75701: Catherine Booth Apts, 602 Golden Rd (75)
16. Waco, TX 76708-1141: William Booth Gardens Apts, 4200 N 19th (120)
17. Waco, TX 76708-1141: Catherine Booth Appts, 2005 Steward Dr (75)

Rapid, Transitional and Permanent Supportive Housing Projects in the State of Texas

1. Austin, TX: Passages Collaboration, Tenant Based Rental Assistance Partnership (thru City of Austin) 60 units of Transitional Scattered Site Housing
2. Austin, TX: Passages Rapid Housing Demonstration Project 30 unit Transitional Housing (HUD Funded)
3. Austin, TX: Veterans Homelessness Prevention Demonstration Project, Rapid Rehousing and Homeless Prevention in 5 Central Texas Counties, (HUD Funded)
4. Austin, TX: Healthy Communities Collaborative, (thru Austin Travis County Integral Care), Rapid ReHousing Grant Funding, (State DSHS Funded)
5. Austin, TX: Best Single Source Plus Collaboration, Rapid Rehousing Grant Funding (thru Caritas of Austin)
6. Austin, TX: City of Austin (HHSP) Rapid Rehousing Grant Funding
7. Austin, TX: Supportive Services for Veterans Collaboration (thru Front Steps) Rapid Rehousing Grant Funding
8. Corpus Christi, TX: Transitional Housing 7 families
9. Corpus Christi, TX: Transitional 28 singles.
10. El Paso, TX: Transitional Housing - 11 families
11. Galveston, TX: Transitional Housing - 18 singles

12. Galveston, TX: Permanent Supportive Housing - 15 units
13. Houston, TX: Transitional 60 females (Addiction Recovery)
14. Houston, TX: Permanent Supportive Housing for Young Adults - 40 units
15. Lubbock, TX: Transitional Housing - 9 single/7 families
16. Dallas, TX: Mabee Permanent Supportive Housing - 14 veterans
17. Dallas, TX: Mabee Permanent Supporting Housing - 14 veteran
18. Dallas, TX: Mabee Transitional Housing, Simon House - 40 disabled singles
19. San Antonio, TX: Transitional Housing, 8 disabled singles
20. San Antonio, TX: Transitional Housing Scattered Sites 27 units
21. San Antonio, TX: Transitional Housing for Families, 8 units
22. San Antonio, TX: Transitional Housing 16 singles
23. Waco, TX: Rapid ReHousing - 14 families

All Permanent Housing programs are Leasing Programs using individual apartment units not owned by The Salvation Army. Rapid Housing programs utilize individual apartment units not owned by The Salvation Army. Transitional Housing Scattered Sites program utilizes individual apartment units not owned by The Salvation Army/clients can transition in place. All other Transitional Housing Programs are operated within the owned Salvation Army sheltering facility. For more information about The Salvation Army, please see Tab 6.

- 12. Detailed Project Budget.** Use the following table, or comparable format, to provide a complete project budget. Add line-items as necessary. If this project has already received funding from AHFC, indicate by line item the amounts from the prior award.

DETAILED PROJECT BUDGET

	Cost	Prior award of RHDA	RHDA Funds Requested	Description or Comments
PREDEVELOPMENT				
Appraisal	3,000		3,000	
Environmental Review	N/A		N/A	
Engineering				Included in architecture fees
Survey	7,000		7,000	
Architectural	49,000		49,000	
TOTAL PREDEVELOPMENT	59,000		59,000	
ACQUISITION				
Site and/or Land	1,570,000		0	
Structures				
Other (specify)				
TOTAL ACQUISITION	1,570,000		0	
HARD COSTS				
Infrastructure	50,000		50,000	
Site work	897,589		897,589	
Demolition				
Concrete	426,917		426,917	
Masonry	0		0	
Rough carpentry	649,083		649,083	
Finish carpentry	209,578		209,578	
Waterproofing & Insulation	20,000		20,000	
Roofing & Sheet Metal	108,648		108,648	
Plumbing/Hot Water	472,415		472,415	
HVAC	425,941		425,941	
Electrical	402,255		32,841	
Doors/Windows/Glass	325,815		0	
Lath & Plaster/ Drywall & Acoustical	205,959		0	
Tile work	116,443		0	
Soft & Hard Floor	102,708		0	
	129,699		0	
Paint/Decorating/Blinds/Shades				
Specialties/Special Equipment	106,951		0	
Cabinetry/Appliances	0		0	
Carpet	0		0	
Other (GC Insurance, OH, Profit)	386,566		0	
Construction Contingency	100,000		0	
TOTAL CONSTRUCTION	5,136,566		3,293,012	
SOFT & CARRYING COSTS				
Legal	0		0	
Audit/Accounting	0		0	
Title/Recording	0		0	
Architectural/Engineering	647,988		647,988	
Construction Interest	0		0	
Construction Period Insurance	0		0	
Construction Period Taxes	0		0	
Relocation	0		0	
Marketing	0		0	
Other: Owner Contingency	100,000		0	
Other: (FFE)	56,500		0	
TOTAL SOFT & CARRYING COSTS	804,488		647,988	
TOTAL PROJECT BUDGET	7,570,054		4,000,000	

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

- a. **Sources and Uses of Funds** – Complete **Tables A & B (below)**, 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			1,570,000	Deed	Sponsor will donate land
Private Financing (List Lenders)					
Federal Home Loan Bank Grant			1,000,000	Pending	Construction Cots, Soft a Carrying Costs
			1,000,054	Pending	Construction Costs, Soft Carrying Costs
Other Sources (List Below)					
Proposed RHDA Funds			4,000,000		
TOTAL			7,570,054		

TABLE B: USES OF FUNDS SUMMARY		
	Total Cost	Cost/Unit
Predevelopment	59,000	1,475
Acquisition	1,570,000	39,250
Hard Costs	5,136,566	128,414
Soft & Carrying Costs	804,488	20,112
TOTAL	7,570,054	189,251

- b. **Leveraging** – Complete **Table C (below)**.

TABLE C: PERCENTAGE OF RHDA FUNDS	
RHDA Funds	\$4,000,000
Other Funds	\$3,570,054
Total Project Cost	\$7,570,054
RHDA Funds ÷ Total Project Cost=	52%

- c. **Operating Proforma** – In a format comparable to Table D below, prepare a minimum twenty (20) year financial Operating Proforma which realistically reflects the operation of the project relative to current and anticipated revenues, expenses and debt. The Proforma must indicate the anticipated debt coverage ratio (DCR) calculated as follows: net operating income (NOI)/debt service (DS) = DCR. For projects that will not carry debt, use the number "1" as the denominator in the equation.

TABLE D: OPERATING PROFORMA			
Unit Size (BR/BA)	Number of Units	Monthly Rental Income	Annual Rental Income
One bedroom	5	400	24,000
Two Bedroom	5	500	30,000
Two Bedroom	20	525	126,000
Three Bedroom	10	600	72,000
FULL OCCUPANCY ANNUAL INCOME			252,000
Less Vacancy Loss (5%)			18,900
GROSS ANNUAL INCOME			233,100

Inflation Factor - Income	3
Inflation Factor - Expense	3

	Year 1	Year 2	Year 3	Year 4	Year 5
Gross Annual Income	233,100	237,762	242,517	247,367	252,314
EXPENSES					
Utilities	30000	30900	31827	32781	33765
Insurance	10000	10300	10609	10927	11255
Maintenance/Repair	36000	37080	38192	39338	40518
Property Taxes	0	0	0	0	0
Management	8000	8240	8487	8741	9004
Marketing	0	0	0	0	0
Maintenance Reserve	12000	12360	12730	13112	13506
Other Admin and Payroll	86000	88580	91237	93974	96793
TOTAL EXPENSES	182000	187460	193083	198875	204842
NET OPERATING INCOME (NOI)	51,100	50,302	49,434	48,492	47,472
Sources of Funds & Debt Service	N/A	N/A	N/A	N/A	N/A
TOTAL ANNUAL Debt Service (DS)	N/A	N/A	N/A	N/A	N/A
Cash-flow after Debt Serv (CF = NOI – DS)	51,100	50,302	49,434	48,492	47,472
Debt Coverage Ratio (DCR = NOI/DS)	N/A	N/A	N/A	N/A	N/A

14. Good Neighbor Policy. Please refer to the City's Good Neighbor Guidelines and demonstrate compliance with the Good Neighbor Policy by completing the Good Neighbor Checklist and providing the documentation requested.

We are in the process of reviewing the Good Neighbor Policy and determining the timing of the next steps.

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.

The Salvation Army will be the primary provider of the core case management and supportive services for the heads of household at Booth Village Apartments. 1.5 FTE case managers will office on site and provide both individual and group services to adults. The Austin Area Command has over 30 years' experience providing comprehensive case management and support services to low income and homeless individuals in Austin Texas. Salvation Army case management empowers homeless families in their transition to stable housing and addresses barriers to self-sufficiency that may be contributing to poverty. TSA has working relationships with a number of other community organizations i.e. Goodwill Industries, CommUnity Care Clinic, Project BRIDGE, and others that case managers will utilize on a referral basis for employment assistance, health services and child care. TSA also has close relationships with groups such as Austin Travis County Integral Care, Central Texas Dept. of Veterans Affairs, and the Caritas Best Single Source Program to provide mental health/recovery services, VA health care and service connected benefits, and financial assistance with basic needs.

In addition, attached in Tab 7 is a letter of coordination from Foundation Communities Executive Director Walter Moreau documents the extension of out of school time care and educational enrichment programs for children at the neighboring Sierra Vista Apartments which is a short walk from Booth Village Apartments. TSA has a long-standing relationship with Foundation Communities in the provision of partner programs i.e. the Passages Collaboration and the Rapid ReHousing Demonstration Project. Foundation Communities may also serve as a primary referral source for permanent housing as Booth Village transitional housing clients.

Case management will assist residents to access referrals to the above and other community services through bus passes and limited transportation in Salvation Army vehicles. Case management will schedule on site services from other groups when possible and distribute resource information through the on-site computer learning lab which will serve as a multi-purpose meeting space, life skills training site and educational center for families.

The menu of programs and services that we plan to offer residents at Booth Village include:

Comprehensive Case Management Services provided by a 1.5 BSW level Social Worker

Transitional Housing Case Plan Goals:

- Develop a plan with each family unit to exit transitional housing to permanent sustainable housing
- Increase skills and income to ensure that the family does not return to homelessness
- Address any issues that have contributed to homelessness, i.e. domestic violence, mental illness, money/debt management, need for income sources in addition to earned income i.e. child support, food stamps, medical assistance programs. Case managers will work on a family budget with each family case to identify barriers to self-sufficiency and address them.

Permanent Supportive Housing Case Plan Goals:

- Stabilize families in housing that is sustainable
- Increase skills and income including on-site benefit screening
- Address issues that may have contributed to chronic homelessness and instability i.e. domestic violence, unemployment, mental illness substance abuse and lack of financial management skills.

Life Skills Training using the on-site computer lab for subject matter relevant to self-sufficiency.

For example, Renters Rights and Responsibilities, Family Budgeting, Consumer Awareness, Energy Conservation, and supportive tools for employment readiness i.e. How to Do Online Job Search, How to Access Employment and Training Resources in Austin as well a training on utilizing child care services etc.

Resident Council to facilitate community programs

Possible programs will include the Neighborhood Watch as well as provide families the tools to maintain compliance with lease requirements and communication with management.

Foundation Communities Services at Sierra Vista/Sierra Ridge

The FC Learning Centers at Sierra Vista and Sierra Ridge will provide all of their programs including pre-k, afterschool academics, adult education, fitness and nutrition classes, and ESL to the residents of Booth Village.

Services Offered through case management linkage to community resources

Possible services include employment support, child care, primary health care, and financial assistance with basic needs.

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

Booth Village Apartments will accommodate 40 families at any given time. The Booth Village Apartments will have a total of 40 units. Of the 40 units, 35 units will be designated as Transitional Housing Program providing subsidized housing for a period of 12 months. Five units will be designated for Permanent Support Housing and will target the chronically homeless families. With an average of turnover of 25%, we expect to serve approximately 50 families or approximately 100 adults and children a year.

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

The Salvation Army has provided basic emergency services to the homeless and low income individuals in Austin since 1889. The largest facility, the Social Services Center which was constructed in 1987, provides the largest multi population shelter in the area as well as a broad array of self-sufficiency services i.e. case management, employment readiness, counseling and education. Other facilities include the Austin Shelter for Women and Children (ASWC), Adult Rehabilitation Center, Corp Community Center and Georgetown Service Center. The Salvation Army has 30 year history of continuity with the City, State, County and federal funders to provide both emergency and long term housing and social services. These include the Austin Shelter for Women and Children, (recipient of the 2014 National Salvation Army Award for Excellence in Programming); the ASWC licensed child care center for homeless children 18 mo thru 4 years; the TSA led Passages Collaboration (2009 recipient of the Butler Award for Spirit of Collaboration) and Passages Rapid Re-Housing Initiative.(the only program in Texas selected for the national HUD Homelessness Prevention Demonstration Project, 2008); the Healthy Communities Collaborative which targets the most vulnerable homeless, the SafeSleep Project for chronically homeless single women, Supportive Services for Veteran Families Collaborative led by Front Steps, and the Best Single Source Plus Program led by Caritas of Austin. TSA was also one of five organizations selected nationally to participate in the three year HUD Veterans Homelessness Prevention Demonstration Project in 2010 which included a research component to develop best practices in serving veterans returning from Iraq and Afghanistan. These programs have a solid record of transitioning clients to permanent housing at a success rate of 75%-85%.

The Salvation Army staff includes LMSW social workers, as well as BSW and Licensed Clinical Social Workers (LCSW) and counselors. The Social Service Director has a Masters' degree in Social Work Planning and Program Development and 34 years' experience in homeless services and public housing administration. The Assistant Social Service Director (LMSW) and Shelter Director (LMSW, MBA) each have 10 and 15 years TSA experience respectively in their positions. The Area Commanders have 42 years of The Salvation Army experience.

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.

The primary services, intensive case management, life skills training, job search assistance, basic computer skills training, linkage to child care, health and employment services will be provided by The Salvation Army staff in conjunction with their existing network of working relationships.

Services The Salvation Army Austin will coordinate with other community organizations:

- Foundation Communities - Foundation Communities has over 20 years' experience developing and overseeing the construction and rehabilitation of affordable housing and providing supportive services to their residents. Through programs such as Insure Central Texas, Financial Coaching, Tax Preparation Centers, and Learning Centers (which are located on site at various apt. complexes) FC helps families increase their earning potential and create safe supervised environments for children. FC is graciously making available all of the supportive services offered at Sierra Vista/Sierra Ridge to the residents of Booth

Village which is just a short walk away. (a letter indicating that this service will be available at Sierra Vista Apartments will be provided)

- Employment and Training for Adults - Referrals will be made to Goodwill Industries and other community resources i.e. Austin Community College.
 - Child Care Program will be coordinated with community resources such as Worksource, Project Bridge, and the Head Start Program.
 - The Salvation Army will coordinate with the Department of Veterans Affairs to ensure Veteran Families are appropriately connected to service related benefits, and with other programs serving such as Supportive Services for Veterans Families which is a collaboration between Front Steps, Caritas, Goodwill Industries and The Salvation Army (funded by The 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.**

See attached in Tab 7.

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.
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.

See attached in Tab 7.

ATTENTION:

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

**RHDA PROGRAM
SCORING CRITERIA**

REQUIRED INFORMATION:

- | | | | |
|-------------------------------|---------------|--------------------------------|--------------|
| 1. Applicant Information | <u> X </u> | 10. Accessible/Adaptable Units | <u> X </u> |
| 2a. Non-profit Required Items | <u> X </u> | 11. Experience/Qualifications | <u> X </u> |
| OR | | 12. Project Budget | <u> X </u> |
| 2b. For-profit Required Items | <u> </u> | 13. Funds Proposal: | |
| 3. Project Description | <u> X </u> | a. Sources | <u> X </u> |
| 4. Site Control/Value | <u> X </u> | b. Uses | <u> X </u> |
| 5. Zoning | <u> X </u> | c. Leveraging | <u> X </u> |
| 6. S.M.A.R.T. Housing | <u> X </u> | d. Operating Proforma | <u> X </u> |
| 7. Development Team | <u> X </u> | 14. Good Neighbor Checklist | <u> X </u> |
| 8. Development Schedule | <u> X </u> | 15. Flood Plain Map | <u> X </u> |
| 9. Developer Capacity | <u> X </u> | | |

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:

 X 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) 0____

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) 0____

_____ **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).

_____ **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
- X is located 0.25 miles (1,320 feet) or less from a transit stop.

Score

8. PRESERVATION OF AFFORDABLE UNITS (10 points)

0_____

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)

0_____

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)

4/2_____

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 (maximum 10 points)

0_____

	<u>Multi-Unit Structures</u>	<u>Single-Unit Structures</u>
10 points	<\$40,000/unit	<\$50,000/unit
8 points	<\$45,000/unit	<\$60,000/unit
6 points	<\$50,000/unit	<\$70,000/unit
4 points	<\$55,000/unit	<\$80,000/unit
2 points	<\$60,000/unit	<\$90,000/unit
0 points	>\$60,000/unit	>\$90,000/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) 0_____

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

TOTAL SCORE _____ **150** _____

**Rental Housing Development Assistance
Application for Rental Development Financing**

**Booth Village Apartments
Austin, TX**

Tab 1 – Non Profit Documentation

Included in this Exhibit are the following:

1. Certificate of status for the applicant
2. 501(c)(3) Certification
3. Certified Financial Audit for 2014
4. Board resolution approving the proposed project and authorizing the request for funding



The State of Texas

SECRETARY OF STATE

IT IS HEREBY CERTIFIED that

THE SALVATION ARMY
[REDACTED]

a GEORGIA corporation, has been issued a Certificate of Authority and the corporation is currently authorized to transact business in Texas.

IN TESTIMONY WHEREOF, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in the City of Austin, on April 9, 1998.



Alberto R. Gonzales
Secretary of State

MAC

Reports Unit
P.O. Box 12028
Austin, Texas 78711-2028



Hope Andrade
Secretary of State

Office of the Secretary of State

CERTIFICATE OF FILING
OF

THE SALVATION ARMY
[REDACTED]

The undersigned, as Secretary of State of Texas, hereby certifies that the Nonprofit Periodic Report for the above named entity has been received in this office and has been found to conform to the applicable provisions of law.

ACCORDINGLY, the undersigned, as Secretary of State, and by virtue of the authority vested in the secretary by law, hereby issues this certificate evidencing filing effective on the date shown below.

Dated: 04/10/2012

Effective: 04/10/2012



Handwritten signature of Hope Andrade in cursive.

Hope Andrade
Secretary of State

Phone: (512) 475-2705
Prepared by: Bridgetta Smith

Come visit us on the internet at <http://www.sos.state.tx.us/>
Fax: (512) 463-1423
TID: 10307

Dial: 7-1-1 for Relay Services
Document: 416630270002



CINCINNATI OH 45999-0038

In reply refer to: 0248205449
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THE SALVATION ARMY
TERRITORIAL HEADQUARTERS
% LEGAL DEPARTMENT
1424 NORTHEAST EXPRESSWAY
ATLANTA GA 30329-2088



102612

Employer Identification Number: [REDACTED]
Person to Contact: Ms Chambers
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Feb. 24, 2015, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in October 1955.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(i).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

0248205449
Mar. 05, 2015 LTR 4168C 0
58-0660607 000000 00
00023270

THE SALVATION ARMY
TERRITORIAL HEADQUARTERS
% LEGAL DEPARTMENT
1424 NORTHEAST EXPRESSWAY
ATLANTA GA 30329-2088

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

Sincerely yours,

Doris P. Kenwright

Doris Kenwright, Operation Mgr.
Accounts Management Operations 1

**RESOLUTION OF THE BOARD OF TRUSTEES
OF
THE SALVATION ARMY**

A Corporation organized and existing under and by virtue of the laws of the State of Georgia and having its principal office in Atlanta, DeKalb County, Georgia.

BE IT RESOLVED THAT the Board of Trustees of The Salvation Army, a Georgia Corporation on behalf of The Salvation Army Austin Area Command, Texas grant authorization for **Anthony Juilana**, Divisional Secretary for Program, to sign and submit the City of Austin Housing Development Assistance for City funding, for the Booth Village, Transitional Housing for Families, Rental Housing Development Assistance Program for the 2016-17 funding period.

BE IT FURTHER RESOLVED THAT for the purpose of consummating said transaction, the President, **DONALD C. BELL**, or Vice President, **F. BRADFORD BAILEY**, or Treasurer/Assistant Secretary, **JAMES K. SEILER**, or Trustee, **WILLIAM G. MOCKABEE**, or Assistant Treasurer **STEPHEN ELLIS**, or Secretary, **WARD MATTHEWS**, or Trustee, **JOHN T. NEEDHAM**, or Trustee, **MARGARET MCGOURN**, or Trustee, **DEBI BELL**, or Trustee, **HEIDI BAILEY**, or Assistant Secretary, **MELANIE MATHIS BRACKETT**, or Contracting Officer, **BRUCE E. SMITH** are authorized, directed and empowered to issue, sign and deliver, as the act and deed of this Corporation.

I, Ward Matthews, Secretary of The Salvation Army, a Georgia Corporation, do hereby certify that the foregoing is a Resolution adopted by the Board of Trustees of said Corporation at a meeting held on the 23rd day of June, 2016.

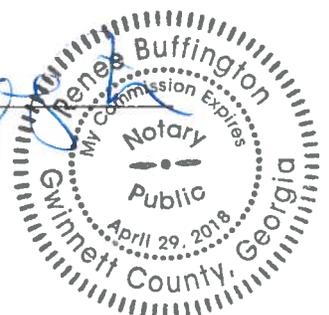
IN WITNESS WHEREOF, I have hereunto set my hand officially and affixed the seal of this Corporation on this 23rd day of June, 2016.

Ward Matthews, Secretary

Sworn to and subscribed before me this 23rd day of June, 2016.

Notary Public

RENEE BUFFINGTON



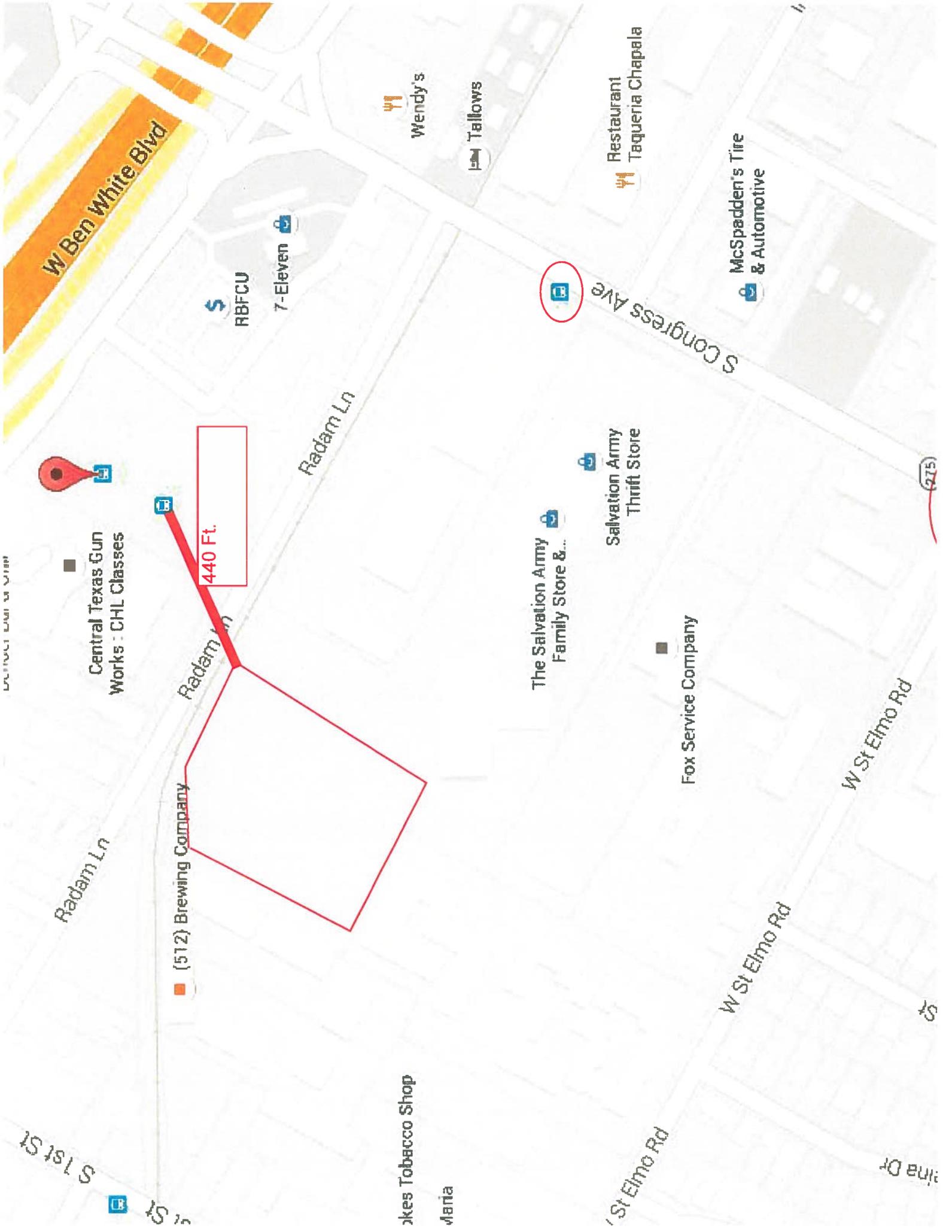
**Rental Housing Development Assistance
Application for Rental Development Financing**

**Booth Village Apartments
Austin, TX**

Tab 2 – Maps

Included in this Exhibit are the following:

1. Map showing the property location and the distance to the nearest Capital Metro Transit Stop.
2. A flood plain map



W Ben White Blvd

RBFUCU
7-Eleven

Wendy's
Tallow's

Restaurant
Taqueria Chapala

McSpadden's Tire
& Automotive

S Congress Ave

Central Texas Gun
Works : CHL Classes

440 Ft.

(512) Brewing Company

Radam Ln

The Salvation Army
Family Store &...

Salvation Army
Thrift Store

Fox Service Company

W St Elmo Rd

W St Elmo Rd

W St Elmo Rd

Wesley's Tobacco Shop

S 1st St

S 1st St

W St Elmo Rd

Home

Floodplain Information

Floodplain Models

Elevation Certificates

FEMA Map Change Information

Historic FEMA Information

Floodplain Changes

Address: 4216 S CONGRESS AVE

Locate

OR

Property ID: 0411050329

County: Travis

Locate

CL

Address Candidates for

4214 1/2 S CONGRESS AVE

4216 S CONGRESS AVE

4214 1/2 S CONGRESS AVE

411 RADAM LN Score: 58

408 RADAM LN Score: 58

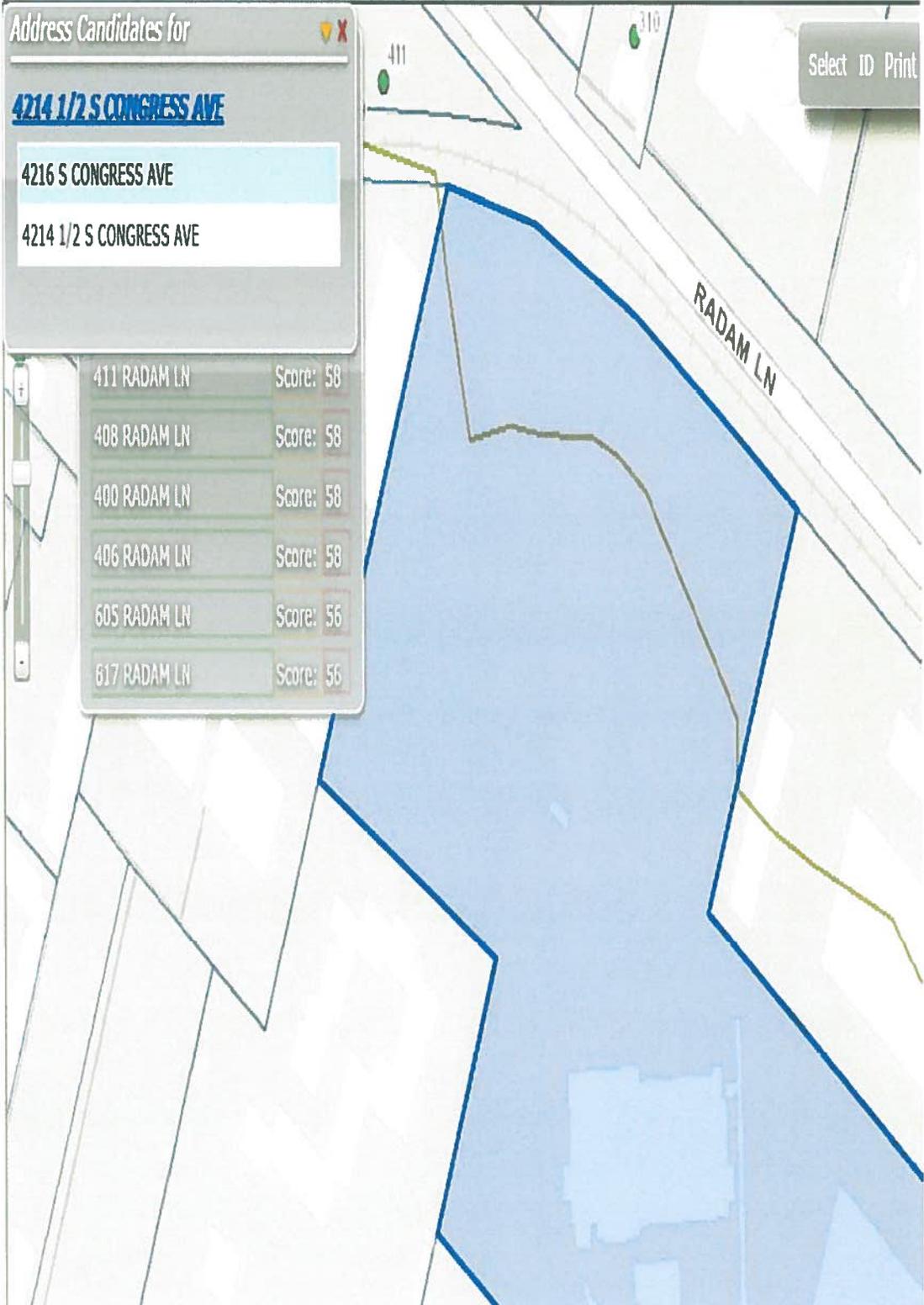
400 RADAM LN Score: 58

406 RADAM LN Score: 58

605 RADAM LN Score: 56

617 RADAM LN Score: 56

Select ID Print



**Rental Housing Development Assistance
Application for Rental Development Financing**

Booth Village Apartments

Austin, TX

Tab 3 – Site Control

Attached is the warranty deed for the property.

DOC. NO. (

91014825

CT-A/WASB/901307

FILM CODE

00004679180

700
CP

WARRANTY DEED

executed on January 28th, 1991

to be effective

DATE: February 21 1991

8:20 AM 6613

7.00 JNDX
2 4 02/22/91
910148.25-DOC#
29.01-CHK#

GRANTOR: GEORGE S. NALLE, JR. and ANNE BYRD NALLE

GRANTOR'S MAILING ADDRESS:
(including county)

GRANTEE: THE SALVATION ARMY

GRANTEE'S MAILING ADDRESS:
(including county)

PO Box 16440
Austin TX 78721

CONSIDERATION:

TEN AND NO/100 DOLLARS (\$10.00) and other valuable consideration.

PROPERTY:

Lot 1, Salvation Army Arc Subdivision, a subdivision in Travis County, Texas, according to the map or plat of record in Volume 89, Page 187 of the Real Property Records of Travis County, Texas.

RESERVATIONS FROM AND EXCEPTIONS TO CONVEYANCE:

Easements, rights-of-way, and prescriptive rights, whether of record or not; all presently recorded restrictions, reservations, covenants, conditions, oil and gas leases, mineral severances, and other instruments, other than liens and conveyances, that affect the property; rights of adjoining owners in any walls and fences, or shortages in area or boundary lines; any encroachments or overlapping of improvements.

Grantor, for the consideration and subject to the reservations from and exceptions to conveyance and warranty, grants, sells and conveys to Grantee the property, together with all and singular the rights and appurtenances thereto in any wise belonging, to have and to hold it to Grantee, Grantee's heirs, executors, administrators, successors or assigns forever. Grantor

CT3091.1

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

11379 0844

4-1105-0329

binds Grantor and Grantor's heirs, executors, administrators, and successors to warrant and forever defend all and singular the property to Grantee and Grantee's heirs, executors, administrators, successors and assigns against every person whomsoever lawfully claiming or to claim the same or any part thereof, except as to the reservations from and exceptions to conveyance and warranty.

When the context requires, singular nouns and pronouns include the plural.

George S. Nalle, Jr.

GEORGE S. NALLE, JR.

Anne Byrd Nalle

ANNE BYRD NALLE

STATE OF TEXAS :

COUNTY OF TRAVIS :

This instrument was acknowledged before me on the 28th day of JANUARY, 1991, by GEORGE S. NALLE, JR.

David Bounds

Notary Public, State of Texas

NOTARY SEAL

CT3091.1

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

11379 0845

STATE OF TEXAS :

COUNTY OF TRAVIS :

This instrument was acknowledged before me on the 28th day of JANUARY, 1991, by ANNE BYRD NALLE.

Daniel Bourd
Notary Public, State of Texas

AFTER RECORDING RETURN TO:

Delivered to grantee on February 21, 1991

George S. Nalle, Jr.
George S. Nalle, Jr.

STATE OF TEXAS COUNTY OF TRAVIS
I hereby certify that this instrument was FILED on the date and at the time stamped hereon by me, and was duly RECORDED, in the Volume and Page of the named RECORDS of Travis County, Texas, on

FEB 22 1991



Anna DeBeauvoir
COUNTY CLERK
TRAVIS COUNTY, TEXAS

FILED
FEB 22 4 54 PM '91
ANNA DEBEAUVOIR
COUNTY CLERK
TRAVIS COUNTY, TEXAS

Return to Commercial Title
grantee
PO Box 16440
Austin TX
78721

CT3091.1

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

11379 0846

**Rental Housing Development Assistance
Application for Rental Development Financing**

Booth Village Apartments

Austin, TX

Tab 4 – Zoning

The current zoning is “CS - MU – NP”

COMMERCIAL SERVICES (CS): Commercial or industrial activities which typically have operating characteristics or traffic service requirements generally incompatible with residential environments, such as equipment sales, custom manufacturing, vehicle storage, or construction services.

MIXED USE (MU): This Combining District Is intended to combine with selected base districts, to permit any combination of office, retail, commercial, and residential uses within a single development.

NEIGHBORHOOD PLAN (NP): Provides an opportunity for citizens to take a proactive role in the planning process and decide how their neighborhoods will move into the future while addressing land use, zoning, transportation and urban design issues. This property is within the South Congress Neighborhood Plan district.

**Rental Housing Development Assistance
Application for Rental Development Financing**

Booth Village Apartments

Austin, TX

Tab 5 – S.M.A.R.T. Housing

The application for the S.M.A.R.T. Housing Program has been submitted. Once we receive the letter stating that this project meets the program requirements, we will submit it under separate cover.

**Rental Housing Development Assistance
Application for Rental Development Financing**

Booth Village Apartments

Austin, TX

Tab 6 – Developer Capacity

Attached is further information on The Salvation Army's experience and capacity. Also included are corporate profiles on the project manager, the project architect, and the project contractor.

THE SALVATION ARMY'S HISTORY, PURPOSE, & CURRENT ACTIVITIES

For more than one hundred and twenty-five years, **The Salvation Army** has provided services and programs for needy families and individuals across the country and within the State of Texas. Today, **The Salvation Army** successfully operates many local programs, such as social services centers, emergency shelters for the homeless, disaster relief services, and adult rehabilitation centers. In addition to such programs, **The Salvation Army** also develops and manages a large portfolio of Section 202 projects. In Texas alone, **The Salvation Army**, and specifically its Texas Division and Austin Area Command, owns and operates 5 such supportive housing communities for elderly residents. **The Salvation Army** is well positioned to undertake more such developments throughout the State of Texas and specifically in the Central Texas Region.

HISTORY & PURPOSE

Founded by William Booth in 1878, **The Salvation Army** is one of the oldest and largest human service organizations in the United States. Its outreach has expanded to include 110 countries, its message translated into 160 languages. Headquartered in London, England, **The Salvation Army** is highly regarded by the public, governments, and other human service agencies for its competent management capabilities, excellent programs, and its ability to respond to changing social problems. With its deep and broad understanding of human needs and how to respond to those needs, the organization's service ranges from the very young to centenarians, from those too proud to ask for help, to those completely dependent on others.

While the organization has maintained the traditional social services developed by William Booth, it has also developed new programs to address contemporary needs. Among these are Emergency Disaster Services; Rehabilitation Programs; Basic Needs (including food rent/utilities, back to work programs, family stores and clothing); Correctional Services, Senior Services, Youth Programs; Spiritual Ministry; Programs Combating Human Trafficking; and Housing. Housing programs include Emergency Shelter facilities, Transitional Housing, Permanent Supportive Housing, and Rapid Rehousing. All of these programs are an outward visible expression of the Army's strong religious principles and mission statement:

"The Salvation Army, an international movement, is an evangelical part of the universal Christian Church. Its message is based on the Bible. Its ministry is motivated by love of the God. Its mission is to preach the Gospel of Jesus Christ and to meet human need in His name without discrimination."

In the United States, the functions of **The Salvation Army** are coordinated under the direction of the National Commander with Headquarters located in Alexandria, Virginia. For administrative purposes, the nation is divided into four territories. Such territories are made up of smaller units known as divisions, of which there are 40 in the United States, each headed by a divisional commander. Divisions are made up of corps community centers (the basic units) and various specialized centers. The functions of each corps include religious and social services that are adapted to local needs. Each corps is under the

supervision of a commanding officer who is responsible for the administration of Army services in his or her command.

CURRENT ACTIVITIES

The Salvation Army's hierarchical organization—which stems from the local community and reaches upward—allows proposed projects such as this to benefit from The Army's varied, extensive, and nationwide experience in managing programs and facilities. Currently, the Southern Territory Headquarters oversees Adult Rehabilitation Centers, including five located in Texas. The Texas Division Headquarters likewise conducts its own activities, including the management and operation of Corps Service Centers, Retirement Centers, Prisoner Pre-Release Centers and Correctional Services, Youth Centers, Homeless and Crisis Centers, Programs Combating Human Trafficking, Emergency Disaster Services, and numerous types of Housing Programs including Transitional, Rapid Rehousing and Permanent Supportive Housing..

On a local level, the Austin Area Command has existed since 1889. The goals of the Austin Command are to provide for the basic and emergency living needs of the homeless and low income citizens of Austin/Travis and Williamson Counties and to provide them opportunities to attain self-sufficiency.. During its nearly 126 years of service, the Austin Command has worked closely with government and community providers to establish and operate the following programs and facilities:

- ❑ ***Social Services Center.*** Provides emergency services to homeless and distressed individuals and families. The center offers hot meals, laundry facilities, clothing assistance, showers, case management (including coordinated assessment), life-skills training, veterans outreach, computer learning lab, children's tutoring and academic enrichment programs, comprehensive job search assistance, and transitional housing/rapid rehousing programs on site in downtown Austin....
- ❑ ***Red Shield Lodge/Emergency Shelter for the Homeless.*** Provides temporary living quarters and supportive services for 242 men, women, and children every night. Includes 38 transitional shelter beds for new workers (single men and women recently employed) and the SafeSleep Project which shelters chronically homeless single women (25 beds). Located in downtown Austin.
- ❑ ***Employment Services.*** Provides training in interviewing, resume writing, and social interaction skills. Resource Room and Computer Learning Lab assist with self-directed job search. Training and job referrals coordinated with Goodwill Industries and WorkSource. Located in Social Service Center.
- ❑ ***Emergency Disaster Relief Services.*** The Salvation Army Mobile Canteen responds to disasters of all types including fires, floods, and tornadoes, and provides meals, clothing, and counseling for victims and emergency crews. Disaster Services Center provides a warehouse and base of operations in South Austin.
- ❑ ***Collaborative Long Term Housing and Supportive Services Programs***. Salvation Army currently participates in a number of publicly funded collaborations to fund transitional and rapid rehousing programs for individuals and families experiencing homelessness. These include the Passages Collaboration, Tenant Based Rental Assistance Partnership, Passages Rapid Rehousing Initiative, Best Single Source Plus Collaboration, Supportive Services for Veterans Families, and

Healthy Communities Collaborative, These programs link homeless individuals and families to affordable sustainable housing plans and supportive services such as child care and financial assistance. All of the above include long term case management for 6 to 18 months. Located downtown at the Social Service Center

- ❑ ***Adult Rehabilitation Center.*** Provides comprehensive residential rehabilitation program in south Austin for men in recovery from chemical dependency. (128 beds) Faith based program that receives no government funds. Five family thrift stores provide furniture, clothing and household appliances at locations across the city and donate proceeds to the Adult Rehabilitation Center.
- ❑ ***Austin Shelter for Women and Children*** Salvation Army operates this city funded facility for homeless women and their children (60- beds). Comprehensive case management, child/family therapy, licensed on-site child care, life skills training, computer learning center, and transitional and rapid rehousing programs are included Located in East Austin
- ❑ ***Citadel Corp Community Center.*** Provides a church and character building programs in a community center setting in South Austin..
- ❑ ***Christmas Assistance*** The Salvation Army arranges corporate and private donor sponsorship for thousands of children to receive Christmas gifts, clothing and food. through the Angel Tree Program located at the Christmas Center in South Austin.

More information about the Austin Area Command and **The Salvation Army** is included in this Exhibit.



Square One Consultants is a full-service Owner Representation / Project Management firm specializing in assisting Owners achieve their goals. Founded by, Kevin Fleming, in 1995 and based in Austin, TX, we now have a team of 16 professionals.

Square One's approach to new projects focuses on our ability to provide Owner's Representation through analysis and consultation for every aspect of the project, including structuring, planning, zoning, budgeting, designing, financing, coordinating, contractor selection and more. Our team has assisted clients in securing services of design teams, architects, appraisers, surveyors, civil engineers, security personnel, roof consultants and others

The primary goal of our project management team is to provide a comprehensive set of services that ensure all aspects of the project are coordinated to meet our clients' needs. As a result of our continual focus to maintain these key factors, Square One Consultants has been successful at consistently delivering projects that exceed our client's expectation



Kevin@sq1.us

(512) 633-0668

www.squareoneconsultants.com

Kevin Fleming

President, Project Manager
1000 Westbank Dr, Ste 4A
Austin, TX 78746
Phone: 512.633.0668
kevin@sq1.us

With 35 years in the industry, Kevin is highly proficient in the Project Management/Owner Representation field and continually provides exceptional service to his clients. Coupled with his degree in architectural engineering and experience at Lincoln Property Company, Kevin provides vast knowledge and understanding to Owners with seeing a project from conception to completion. Founding Square One in 1995, Kevin continues to lead a company committed to excellence in performing on behalf of owners, identifying their needs and executing their project goals. From communicating with all involved parties, to focusing on all project facets and challenges, Kevin not only succeeds in finishing a project in a timely manner but also gains the respect and trust of his clients, making him a leading individual in his industry.

Professional Experience

Square One Consultants, Inc.
Project Manager

- Land assessment for development purposes
- Managing all design disciplines including civil architectural, interior design, and consultants for specific projects
- Hiring contractors
- Negotiating all contracts

Project Control
Project Manager

Markborough Properties
Senior Project Manager

Lincoln Property Company
Project Manager

Education & Credentials

BS in Architectural Engineering, 1980, The University of Texas at Austin

Texas Real Estate Broker License, 1990

Native American Cherokee

Community Involvement

Real Estate Council of Austin, Member

Austin Chamber of Commerce, Member

Urban Land Institute, Member

Lake Travis School Board, Member

Lakeway Church Board, Member

Downtown Austin Partners, Chairman

Mueller Redevelopment Commission, Member

Town Lake Travis Represent Advisory Committee, Member

Member
specialty

1991-1995

1991

1981-1991

Partial Project List

ERCOT

275,000 SF
Taylor, Texas
\$100,000,000

Osage Nation Casinos

860,000 SF
Ponca City, Skiatook, and Tulsa, Oklahoma
\$480,000,000

City Public Service

75,000 SF
San Antonio, Texas
\$28,000,000

Circuit of the Americas Formula 1 Race Track

600 Acres
Austin, Texas
\$275,000,000

100 Congress

610,000 SF
Austin, Texas
\$65,000,000

Lakeway Swim Center Park

N/A
Lakeway, Texas
\$2,500,000

SuperSplash Adventure Waterpark

40,000 SF
Edinburg, Texas
\$22,000,000

Saltillo Lofts

39 Units
Austin, Texas
\$4,700,000

Plaza 7000

158,000 SF
Austin, Texas
\$15,000,000

Hampton Inn

85,000 SF
Austin, Texas
\$6,000,000

Towers of Lakeway, Phase I & Phase II

60,000 SF
Lakeway, Texas
\$9,500,000

Ho-Chunk Nation Casinos

362,000 SF
Wisconsin Dells, Black River Falls, Wittenberg,
and Nekoosa, Wisconsin
\$170,000,000

Cirrus Logic

200,000 SF
Austin, Texas
\$50,000,000

Midtown Medical Center

80,000 SF
Austin, Texas
\$15,000,000

Lake Travis Independent School District

N/A
Austin, Texas
\$45,000,000 Bond Program

Energy Centre

1,200,000 SF
New Orleans, Louisiana
\$100,000,000

Quapaw Downstream Casino

425,000 SF
Miami, Oklahoma
\$300,000,000

Lakeway Resort and Spa

90,000 SF
Lakeway, Texas
\$15,000,000



Glenn Hart

AIT – Project Manager
1000 Westbank Dr, Ste 4A
Austin, TX 78746
Phone: 512.751.2830
ghart@sq1.us

Glenn has worked the last fourteen years in the construction industry developing a specialized knowledge base to provide immense value to his clients using his degree in architecture and experience as a project manager. His responsibilities include design and drafting construction documents, preparing estimates, and reviewing project specifications to ensure accuracy in all facets. Currently, Glenn also works with individual clients in creating custom residential designs and documentation for high-end luxury residences up to 10,000 SF.

Professional Experience

Square One Consultants, Inc. <i>Project Manager</i>	2015-Present
<ul style="list-style-type: none">• Conducts the firm's business development initiatives between current and potential clients• Effectively coordinate internal teams• Provide comprehensive weekly and monthly reporting for projects• Review and implement change orders as approved by Owner	
Pilot Catastrophe Services <i>Independent Insurance Adjuster</i>	2008-2015
Vintage Builders <i>Construction Project Coordinator</i>	2006-2008
Cornerstone Group Architects <i>Project Coordinator/Architect Intern</i>	2001-2006

Education & Credentials

Bachelor of Architecture,
2001, The University of
Texas at Austin

Texas Insurance Adjuster
License, 2008

Community Involvement

Active Member and
Volunteer at Lake Hills
Church in Bee Cave, TX

Member of Society for
Marketing Professional
Services (SMPS) Austin
Chapter

Relevant Experience

CAPITAL AREA FOOD BANK

Description: Ground-up construction of a new facility with a cooler, freezer, dry storage, and administrative offices

Location: Austin, Texas

Project Cost: \$4,000,000

Project Size: 60,000 SF

General Contractor: Faulkner USA

Architect: STG Design



TEXAS PTA

Description: A 6-level administration building with multipurpose room and lease space for office and retail

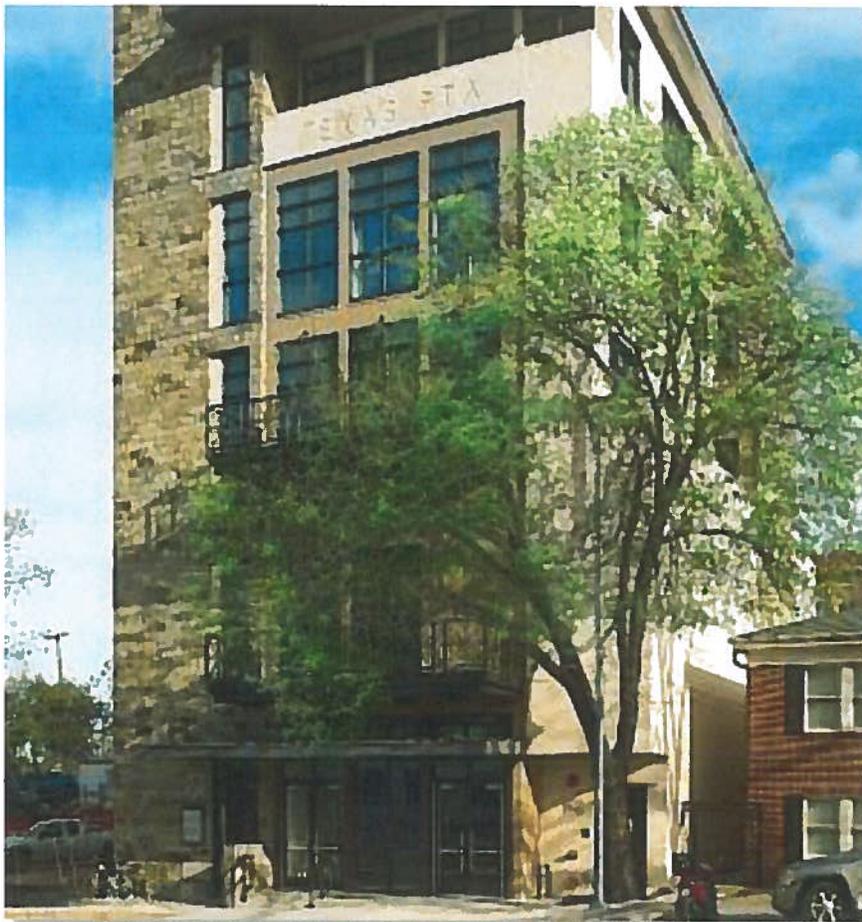
Location: Austin, Texas

Project Cost: \$6,000,000

Project Size: 22,000 SF

General Contractor: White Construction Company

Architect: Dick Clark + Associates



JUNIOR LEAGUE OF AUSTIN

Description: Ground-up construction of a new headquarters building for Junior League of Austin

Location: Austin, Texas

Project Cost: \$18,000,000

Project Size: 35,000 SF

General Contractor: The Beck Group

Architect: STG Design



AUSTIN CHILDREN'S SHELTER

Description: An 8-building campus project to house 80 children from infants to 18 years old as they transition from unacceptable living conditions to new homes; the new facilities allow for better living conditions in a safe and clean environment

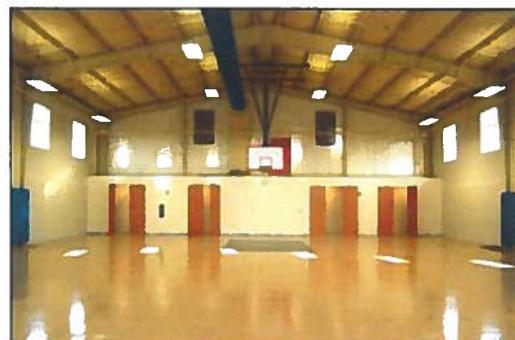
Location: Austin, Texas

Project Cost: \$13,500,000

Project Size: 56,000 SF

General Contractor(s): Square One, Flynn Construction

Architect(s): Kipp Flores Architects, LZT Architects, Inc.



BIG BROTHERS BIG SISTERS

Description: Ground-up construction of a new headquarters for Big Brothers Big Sisters of Central Texas

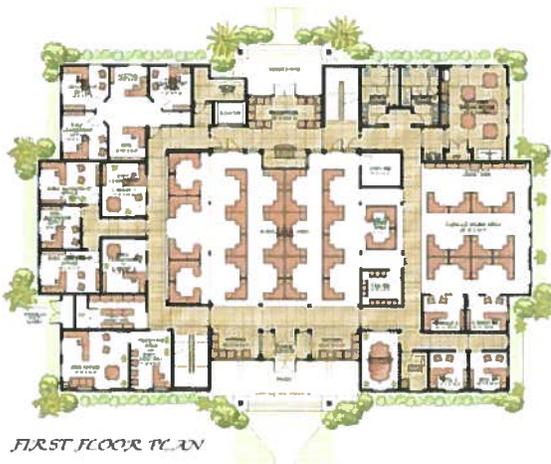
Location: Austin, Texas

Project Cost: \$6,000,000

Project Size: 20,000 SF

General Contractor: The Burt Group

Architect: O'Connell Robertson



FIRST FLOOR PLAN



SITE PLAN

SALTILLO LOFTS

- **Description:** Project consisted of combined residential and commercial condominium units with a warehouse industrial design; the building received several green building points from the City of Austin; site was maximized with covered parking, open areas, and landscape buffers
- **Location:** Austin, Texas
- **Project Cost:** \$4,000,000
- **Project Size:** 39 Units
- **General Contractor:** Bailey Elliott Construction, Inc.
- **Architect:** Hailey Johnson Architects
- **Services:** Full project management of design and construction



CEDAR PARK TOWN CENTER

Description: Multi-family housing containing 136 apartments and 30 townhomes with units ranging from studios to two bedrooms; site amenities include amenities will include a state of the art fitness center, swimming pool, outdoor cooking area, recreation/game room, onsite leasing office, and beautifully landscaped park areas throughout the community; project completion date is scheduled for August 2016

Location: Cedar Park, Texas

Project Cost: \$17,000,000

Project Size: 225,000 SF



Four-Story Apartment Building



Five-Unit Townhome





The Salvation Army



Interview Presentation & Firm Qualifications

July 15, 2015

Firm Overview

At O'Connell Robertson, we believe every project has a mission. We know that the strength of our endeavor is in the purpose it serves. And we strive each day to design environments that positively impact all who experience and interact with our work.

We use this mission-driven approach to create environments that allow people to be more effective and engaged in their surroundings. We are deeply aware that each facility we design has a purpose that extends far beyond form and function. And we understand that every environment we create affects how people live, work and learn. It's why we never stop innovating. Our team is always seeking and exploring more effective solutions that will achieve better outcomes for all.



Since our Firm was established in 1950, we have completed more than 1,500 projects, ranging from small renovations to new multi-million dollar facilities. We are dedicated to finding smart, functional solutions that exceed expectations at every turn. Our facilities are planned to specifically support each client's unique goals.

As a full-service firm offering architecture, engineering and interior design, O'Connell Robertson offers a single-source solution. Our diverse in-house expertise and broad range of capabilities enable us to see projects from different perspectives, and offer new approaches to solving difficult problems.

Architecture – At O'Connell Robertson we are committed to the understanding of our clients' business as well as the

needs of a specific project. With this knowledge our architects are better able to understand the true mission of the task and better equipped to offer smarter solutions for any environment.

Engineering – With deep expertise, our engineers are better able to comprehend the purpose of every project and deliver effective, efficient design allocations for mechanical and electrical equipment.

Interior Design – O'Connell Robertson's team of experienced licensed interior designers employs up-to-date research and problem-solving intuition to create brilliant yet purposeful interior environments that bring the mission of every project to life.

Sustainable Design – O'Connell Robertson is a member of the U.S. Green Building Council and more than 25 percent of our staff are LEED Accredited Professionals. O'Connell Robertson incorporates sustainability and energy-efficient features as part of every design.

Construction Administration – Our Construction Administration department provides support and guidance from design through project completion.

Firm Overview

Firm Locations

Austin
811 Barton Springs Rd.
Suite 900
Austin, TX 78704
512.478.7286

San Antonio
4040 Broadway
Suite 300
San Antonio, TX 78209
210.224.6032

Staff Resources

Total Number of Employees: 50

- | | |
|-----------------------------------|------------------------------|
| 8 Registered Architects* | 3 Interior Design* |
| 17 Design/Production | 6 Construction Inspectors |
| 10 LEED AP* | 2 Life Safety Code* |
| 4 Registered Mechanical Engineers | 2 Fire Protection Engineers* |
| 1 Registered Electrical Engineers | 1 Energy Specialist |
| 2 Drafting/Graphics Specialists | 9 Administrative |

**May be included in other categories*



Experience

Project Name: Big Brothers Big Sisters Mentoring Center
Location: Austin, Texas



Project Description: O’Connell Robertson provided the interior programming, design and construction documents for the new Big Brothers Big Sisters Mentoring Center, a 21,000 SF two-story building that will serve as the nonprofit’s headquarters in Rathgeber Village in Central Texas.

Core support spaces in the center will allow the perimeter to completely open up to exterior light. The central core will be ringed by a continuous hallway that will double as a path for tours of the facility. The history of BBBS will be portrayed through a continuous chronological graphic display along the wall of the hallway. An Activity Center will be housed on the second floor, providing a space for mentees to relax, play and gather. The building is being designed to LEED Silver standards.

Project Name: Sally and Mack Brown Rise School of Austin
Location: Austin, Texas



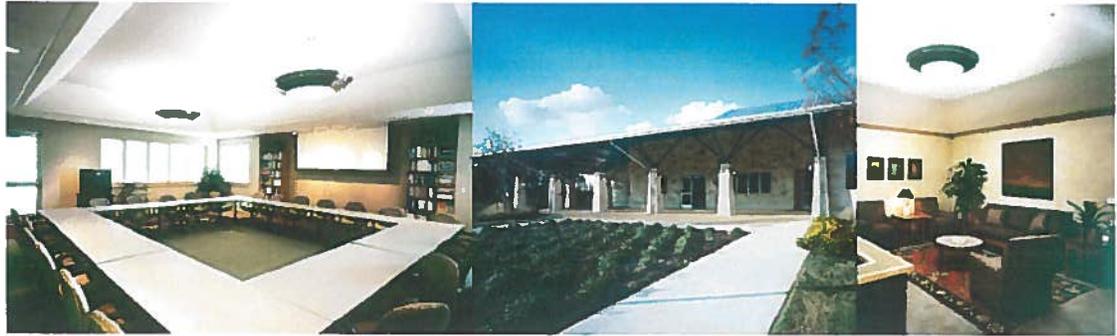
Project Description: O’Connell Robertson worked with the non-profit Sally and Mack Brown Rise School of Austin to create a high-quality facility to support its mission of providing early childhood education services to children of differing abilities.

The 18,000 SF facility located in Rathgeber Village is uniquely designed to correlate varied space characteristics with students’ needs. Classrooms and learning spaces for 80 students are designed to meet the specialized needs of young learners with differing abilities while preparing them for a successful transition to a conventional elementary school campus. The facility includes flexible common areas and indoor/outdoor space for multi-use functionality, maximizing the opportunities for student and parent involvement.



Experience

Project Name: Casey Family Programs Administration Building
Location: Austin, Texas



Project Description: The non-profit Casey Family Programs provides an array of services for children and youth, including adoption, guardianship, kinship, and reunification, with foster care as its core. With this in mind, O’Connell Robertson designed a 10,400 SF administration building for the organization that integrated Texas Hill Country features including a native weathered limestone veneer, pitched metal roof and large covered porches. Based on a 9,000 SF floorplan provided by Casey Family Programs, the building was modified to meet the needs and requirements of the local office. Distinctive spaces include modular offices, multiple conference rooms and open gathering places for a unified community environment.

Casey Family Programs wanted a warm and welcoming atmosphere with durable materials to accommodate the large number of clients and visiting families. The interior finishes and furnishings reflect this direction while maintaining an office function. Design features include vaulted ceilings with suspended pendent lighting in the lobby and conference spaces.

Project Name: Central Health Southeast Health and Wellness Center
Location: Austin, Texas



Project Description: O’Connell Robertson provided architectural and engineering design services transforming an existing VA outpatient clinic into a vibrant destination where programs address a full spectrum of community health and wellness needs. The 65,000 SF clinic offers primary care, specialty care, dental, and behavioral health services, along with a pharmacy, lab, and radiology for one-stop patient convenience. The facility also offers wellness programs to encourage healthier lifestyles. Access to all programs will be facilitated through an enrollment / navigation center, which serves as a single location portal to the full range of services available through the Community Care Collaborative, both at the Southeast Health and Wellness site and elsewhere in Austin.

Experience

Project Name: Metroplex Women's Health Center
Location: Killeen, Texas



Project Description: O'Connell Robertson assisted Metroplex Hospital in consolidating its women's health services into one comprehensive center that could meet the area's growing demands and provide state-of-the-art care.

O'Connell Robertson's design solution was to sculpt a transition space from a major public corridor. Linking the LDRs to the other areas, the corridor was transformed into a nurturing place where visitors and patients could celebrate the miracles of life. The new oval, womb-shaped room was rotated 30 degrees from the main facility's axis to make the well-baby nurseries the area's focal point. Every visitor can now see newborn babies being celebrated by family and friends through the nursery window. The interior design evoked an overall sense of warmth, style and comfort. The renovation resulted in eight new LDRs, new well-baby and intermediate nurseries, 14 renovated and 10 new postpartum rooms, imaging rooms, and outpatient support areas.

Project Name: Anderson House Student Housing Complex
Location: Austin, Texas



Project Description: The 2009 opening of the John and Nancy Anderson House provided much needed on-campus residences for students and visiting faculty of the growing Austin Presbyterian Theological Seminary. The new 42,000 SF housing complex brings 24 apartments to the 12-acre Seminary campus located along Waller Creek, just north of the University of Texas campus. The student residence contains one-, two- and four-bedroom units, all of which include a designated built-in study area. The design met the Seminary's goals of reflecting the campus' style of architecture and incorporating sustainability features. Anderson House was the first multi-family housing facility in Austin to provide "green" power for the entire building. These and other energy measures earned Anderson House a 2-Star Green Building Rating from the City of Austin.



Experience

Project Name: Austin Diocese Priest Retirement Center
Location: Austin, Texas



Project Description: O’Connell Robertson provided a master plan for 12 2,500 SF duplex units and two 2,500 SF community centers for the Diocese of Austin. This facility is the first of its kind in central Texas, and sits adjacent to St. Helen’s Church east of downtown Georgetown. One of the community centers is the focus of the pedestrian courtyard, with the duplexes oriented around it. Each duplex is approximately 1,250 SF, with two bedrooms and one bath, plus a one-car attached garage. The community center includes a chapel and a full kitchen/dining facility.

Project Name: Jarrell Elementary School – Jarrell ISD
Location: Jarrell, Texas



Description of Project: O’Connell Robertson worked with Jarrell ISD to design a cost-effective new elementary school that supported the District’s desired educational delivery. The school is designed to be dynamic and flexible to provide learning environments that respond to today’s teaching methods for its 700 students. The layout is based on a “neighborhood” concept, with each grade level focused around a common space to support collaboration and community. Windows and skylights provide natural lighting and a connection to the environment and the community. Locally cut and quarried stone veneer honors the importance of the region’s quarries. Life-cycle costs were carefully analyzed to select materials and systems that provide the highest return on investment.



Experience

Project Name: Texas Lutheran Synod Office
Location: Seguin, TX



Project Description: O’Connell Robertson provided architectural and engineering services for the offices of the Bishop of the Southwestern District of the Lutheran Church on the campus of Texas Lutheran University in Seguin. The Facility includes offices for the Bishop and staff, a district conference room that is also a chapel, a district library, a meditation garden and a district archive. The building’s focal point is a combination chapel and conference room with exposed heavy timber beams and an ecclesiastical feel. The Synod library, chapel and foyer are separated from the offices to allow evening functions for various members of the district. Being sited on the campus of TLU, the Synod and TLU can form a reciprocal function in the education of fellow Lutherans.

Project Name: Overton Elementary School – Austin ISD
Location: Austin, Texas



Description of Project: Overton Elementary was designed to serve as a comprehensive community center as well as an educational facility that supports Austin ISD’s academic goals. Destinations such as art, music, physical education and the library are located in areas that can be accessed by students during the day and available for community use in the evenings or on weekends. The school was recognized for the incorporation of sustainability features, including energy efficient chilled water HVAC systems, active and passive day-lighting controls, dual flush toilet facilities, low emitting sealants and coatings, and recycled building materials. The school earned a 3-Star Rating in Austin Energy’s Green Building program.

Experience

Project Name: Success High School – Round Rock ISD
Location: Round Rock, TX



Project Description: The new Success High School in Round Rock ISD is a non-traditional school of choice that serves students who desire acceleration, who need evening classes to better fit their personal schedules, or are in at-risk situations. O’Connell Robertson provided master planning, architecture, engineering, interior design and construction administration for the new 68,000 SF building, which offers diverse learning spaces to support and enhance varied activities and curriculum.

The results are academic spaces designed for maximum flexibility, including integrated labs, design studios with operable partitions, small group rooms, and a discovery center. The academic space is centered around a central two-story commons space that offers natural light from all sides. The second story includes a balcony that overlooks the commons and provides informal gathering spaces for students. The campus will include food service, athletic facilities and a childcare center, which will double as a teaching component for an Early Childhood Education curriculum. The project is designed to achieve LEED Silver certification.

Project Name: Liberty County Shelter and Community Center
Location: Liberty, Texas



Description of Project: The project included the demolition of five existing structures to allow for the construction of a new 9,600 SF building designed to meet ICC 500 Hurricane Shelter Requirements. The facility will provide a location for first responders and as a refuge for evacuees during hurricanes. The facility contains a large open protected area that has natural light and operable ventilation as required by ICC 500; a kitchen; restrooms and locker areas; administrative offices; and a dedicated office for the emergency use of the building. The building contains a backup generator along with potable water and wastewater storage for use during an extreme weather event when city utilities cannot be relied upon.



Resumes

Richard Burnight, AIA, ACHA | President



Rick is a Principal with O'Connell Robertson and has more than 35 years of experience. He leads the Firm's architecture team and has served as Principal-in-Charge on numerous education, healthcare and government planning and design projects. He is one of fewer than 60 architects in Texas to be certified by the American College of Healthcare Architects (ACHA).

Education

BS/Architecture – 1977/Iowa State University; MS/Architecture – 1981/University of Texas at Austin

Experience

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School - Early Childhood Center

University of Texas at Austin – Austin, Texas

- On-Going Professional Services
- Texas Union Building Renovation
- Jackson Geological Sciences Building
- Engineering Teaching Center "T-Room" Renovation
- Gearing Hall Food Lab

Diocese of Austin – Georgetown, Texas

- Priest Retirement Center/Duplex Living Units

Austin Presbyterian Theological Seminary – Austin, Texas

- Anderson House Student Housing Complex

Southwestern District of the Lutheran Church – Seguin, Texas

- Offices of the Bishop

Casey Family Programs – Austin, Texas

- Administration Building

Central Health – Austin, Texas

- Southeast Health & Wellness Center

Metroplex Healthcare System – Killeen, Texas

- Women's Health Center
- Three Floor Inpatient Bed Tower Expansion
- Cancer Center / Medical Office Building

Seton Healthcare Network – Austin, Texas

- Trinity Building AMEP Clinic Interior Finish-out
- Brackenridge Emergency Department Renovation
- Brackenridge Hospital Master Plan
- Brackenridge Fourth Floor Renovation

Austin Community College District – Austin, Texas

- Highland Campus Master Plan
- New Elgin Campus

Associations &

Affiliations:

Registered Architect,
TX – 1983 (No. 12255)

Registered Interior
Designer (No. 5821)

American Institute
of Architects; Texas
Society of Architects

Academy of
Architecture for
Health, Health
Facility Institute

National Council
of Architectural
Registration Boards

American College of
Healthcare
Architects

Resumes

Amy Jones | Principal-In-Charge



Amy is a Principal with O'Connell Robertson, dedicating much of her time to nonprofit and K-12 clients, connections and communications. She serves as Principal-in-Charge on numerous projects, ensuring the team achieves the project mission and goals. Her leadership role includes overseeing the firm's marketing, business development, community involvement and public relations efforts.

Education

Bachelor of Journalism – 1988/University of Texas at Austin

Experience

Big Brothers Big Sisters – Austin, Texas

- New Mentoring Center

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School - Early Childhood Center

Austin Community College District – Austin, Texas

- Highland Campus Master Plan

Jarrell Independent School District – Jarrell, Texas

- Bond Election Planning and Communications 2005, 2008
- Jarrell Elementary School
- Jarrell High School
- Jarrell Middle School

Central Health – Austin, Texas

- Southeast Health & Wellness Center

Manor Independent School District – Manor, Texas

- Bond Planning, Facility Master Plan, and Bond Communication Services (2014 Bond)

Eanes Independent School District – Austin, Texas

- Bond Planning & Communications: 2006 & 2010 Elections

Austin Independent School District – Austin, Texas

- Stephen F. Austin High School Feasibility Study

Wimberley Independent School District – Wimberley, Texas

- Long Range Facility Plan Development, Strategic Bond Planning and Communications

Round Rock Independent School District – Austin, Texas

- Success High School & Community Reports
- Westwood High School Assessment, Master Plan, Phase I, Phase II, Community Reports
- Grisham Middle School Clinic Renovations
- Wells Branch Elementary School MEP Renovations

Associations &

Affiliations:

Associations/Affiliations

Big Brothers Big Sisters
Central Texas Board
Member and Chair,
2000-2007; 2015
Society Member

E3 Alliance Missing
School Matters
Regional Attendance
Task Force Co-Chair,
2013-2014

Austin Chamber of
Commerce Education
and Talent Council
Member

Austin Chamber of
Commerce K-12
Progress Report Task
Force, Past
Chairperson

Austin Community
College Pinnacle
Campus Advisory
Council, Past Member

Austin Independent
School District
Facility Master Plan
Work Group, 2012-14

Austin Independent
School District Bond
Athletic Task Force,
2012 - 2013

Round Rock ISD Partners
in Education
Foundation Board
Member,
2003 - Present

Austin High School
Principal Support
Committee



Resumes

Jarrold Sterzinger, AIA, LEED AP | Shareholder / Senior Associate



Jarrold has 16 years of experience serving as both a project manager and architect on a variety of projects. His experience includes facility assessments, educational and technology specifications, master and program planning, and architectural design. He is adept at executing each project's technical components while also incorporating sustainable materials and designs to create healthy, energy-efficient, functional environments.

Education

Master of Architecture – 2002/Texas Tech University;
Master of Business Administration – 2002/Texas Tech University

Experience

Big Brothers Big Sisters – Austin, Texas

- New Mentoring Center

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School – Early Childhood Center

The University of Texas at Austin – Austin, Texas

- On-Going Professional Services
 - Engineering Teaching Center, Multiple Lab Renovations
- Texas Union Building Renovations
- New Texas Advanced Computing Center Building

Austin Community College District – Austin, Texas

- Elgin Campus Master Plan
- Highland Campus Master Plan
- Elgin Campus, Phase One

Jarrell Independent School District – Jarrell, Texas

- Jarrell Elementary School
- Jarrell Middle School Additions and Renovations
- Jarrell High School Additions

Round Rock Independent School District – Round Rock, Texas

- Success High School
- Westwood High School Master Plan, Phases I and II

Wimberley Independent School District – Wimberley, Texas

- Facility Assessments, Long Range Planning & Bond Planning: 2013 Elections
- Danforth Middle School Renovations/Additions
- Jacob's Well Elementary School
- Wimberley High School Renovations/Additions
- Field House, Baseball, Softball & Tennis Improvements
- Administration Building & Transportation Facility Improvements

Associations & Affiliations:

Registered Architect,
TX (No. 19834)

National Council of
Architectural
Registration Boards
Certified

LEED Accredited
Professional

American Institute of
Architects Member

Council of Educational
Facility Planners
International (CEFPI)
Member

Meals on Wheels
Volunteer

RRISD Education
Foundation
Board of Directors,
2014-present





Resumes

Dave Watts, AIA, RAS, LEED AP | Principal / Code Compliance and QA/QC



Dave has 38 years of experience in a variety of building types as an architect, project manager and construction administrator. He is a registered accessibility specialist and provides expertise in ADA and code compliancy issues. He has been with the Firm for 19 years.

Education

Associate Degree/Building Technology – 1975, Cuyahoga Community College

Experience

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School - Early Childhood Center

Big Brothers Big Sisters – Austin, Texas

- New Mentoring Center

University of Texas at Austin – Austin, Texas

- On-Going Professional Services
 - Engineering Teaching Center, Multiple Lab Renovations
- Applied Research Lab Expansion
- Texas Union Building Renovation
- Jackson Geological Sciences Building
- Engineering Teaching Center "T-Room" Renovation
- Animal Resource Center/Seidemann Lab Renovation
- Gearing Hall Food Lab

Diocese of Austin – Georgetown, Texas

- Priest Retirement Center/Duplex Living Units

Austin Presbyterian Theological Seminary – Austin, Texas

- Anderson House Student Housing Complex

Southwestern District of the Lutheran Church – Seguin, Texas

- Offices of the Bishop

Casey Family Programs – Austin, Texas

- Administration Building

Metroplex Hospital – Killeen, Texas

- Women's Health Center

Seton Healthcare Network – Austin, Texas

- Brackenridge Emergency Department Renovation
- Seton AMEP Clinic Interior Finish-out

Jarrell Independent School District – Austin, Texas

- Jarrell Elementary School
- Jarrell High School

Austin Independent School District – Austin, Texas

- Stephen F. Austin High School Feasibility Study
- Bedichek Middle School Renovations
- O. Henry Middle School Additions/Renovations
- Overton Elementary School
- Turner-Roberts Recreation Center

Associations &

Affiliations:

Registered Architect,
TX 1985 (No. 11753)

Registered Accessibility
Specialist, TX - 2003
(No. 379)

Member NCARB

LEED Accredited
Professional





Resumes

Nick Patterson, PE, LEED AP BD+C | Engineering Principal / Mechanical Engineer



Nick is the Principal in charge of the Firm's Engineering Team. A registered mechanical engineer, he has 16 years of experience in the design of mechanical systems for numerous educational and healthcare facilities. As Engineering Principal, he will ensure the appropriate engineering resources are available as needed.

Education

BS/Architectural Engineering – 1998/Kansas State University

Experience

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School – Early Childhood Center

Metroplex Hospital – Killeen, Texas

- Women's Center LDR Expansion
- Cancer Center / Medical Office Building
- Three Floor Inpatient Bed Tower Expansion

University of Texas at Austin – Austin, Texas

- On-Going Professional Services
- Texas Union Building Renovations

Central Health – Austin, Texas

- Southeast Health & Wellness Center

Austin Presbyterian Theological Seminary – Austin, Texas

- Anderson House Student Housing Complex

Austin Community College – Cedar Park, Texas

- New Elgin Campus - Elgin, Texas
- Cypress Creek Campus Expansion/Renovation - Cedar Park, Texas

Round Rock Independent School District – Round Rock, Texas

- Westwood High School Master Plan, Phase I and Phase II Renovations/Additions
- Grisham Middle School Clinic Renovations
- McNeil High School HVAC Renovations
- Wells Branch Elementary School MEP Renovations
- Laurel Mountain Elementary School MEP Renovations

Manor Independent School District – Manor, Texas

- New Technology High School
- Manor ISD Administration Building
- Manor ISD Athletic Complex

Lampasas Independent School District – Lampasas, Texas

- Lampasas High School
- Kline Whitis Renovation & Gym Addition
- Middle School Renovation

Associations &

Affiliations:

Registered Engineer,
TX - 2003 (No. 91113)

LEED Accredited
Professional



Resumes

Jennifer Hoskins, IIDA, LEED AP | Interior Designer



Jennifer has 10 years of experience in interior design, materials and finishes selection, and furniture selection for a variety of facilities.

Education

BS/Interior Design – 2005/Texas State University
BLA/Government – 1999/ University of Texas at Austin

Experience

Big Brothers Big Sisters – Austin, Texas

- New Mentoring Center

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School - Early Childhood Center

Metroplex Hospital – Killeen, Texas

- Women's Center LDR Expansion

Lone Star Circle of Care – Bastrop, Texas

- Community Clinic

Central Health – Austin, Texas

- Southeast Health and Wellness Center

Jarrell Independent School District – Jarrell, Texas

- New Elementary School

Associations &

Affiliations:

Registered ID, TX –
2008 (No. 10850)

International Interior
Design Association
(IIDA) Member

LEED Accredited
Professional



Kurt Schwerdtfeger, RAS, LEED AP BD+C | Project Architect

Kurt has more than 10 years of experience in planning, design and construction management on a variety projects.

Education

Bachelor of Architecture – 2003/University of Kansas

Experience

Big Brothers Big Sisters – Austin, Texas

- New Mentoring Center

Rise School of Austin – Austin, Texas

- Sally and Mack Brown Rise School - Early Childhood Center

Liberty County – Liberty, Texas

- New Community Center/Emergency Shelter

Austin Presbyterian Theological Seminary – Austin, Texas

- Anderson House Student Housing Complex

Associations &

Affiliations:

Registered Accessibility
Specialist, TX - 2012
(No. 10158488)

LEED Accredited
Professional

Resumes

Kim Cochran, CCCA | Principal/Construction Administration



Kim has more than 28 years of experience managing the administration of a variety of facilities. He is responsible for ensuring design goals and specifications are implemented during construction and ensures the resources for construction observation services are provided.

Education

Master of Business Administration, Sports Management – 2007/St. Edward's University;
 BA/Applied Science – 2005/St. Edward's University;
 Associate of Applied Arts & Sciences – 1981/Eastfield College;
 Mid-Management Certification – 1993/SMU

Experience

University of Texas at Austin – Austin, Texas

- On-Going Professional Services
- Applied Research Lab Expansion
- Texas Union Building Renovation
- Jackson Geological Sciences Building
- Engineering Teaching Center "T-Room" Renovation
- Animal Resource Center/Seidemann Lab Renovation
- Gearing Hall Food Lab

Austin Presbyterian Theological Seminary – Austin, Texas

- Anderson House Student Housing Complex

Liberty County - Liberty, Texas

- New Community Center/Emergency Shelter

Casey Family Programs – Austin, Texas

- Administration Building

Metroplex Hospital – Killeen, Texas

- Metroplex Tower Addition
- Ambulatory Surgery Facility
- Cancer Treatment Center

Lone Star Circle of Care – Bastrop, Texas

- Community Clinic

Central Health – Austin, Texas

- Southeast Health and Wellness Center

Otto Kaiser Memorial Hospital – Kenedy, Texas

- Replacement Hospital, Medical Office Building and Wellness Center

City of Lakeway Municipal Facilities – Lakeway, Texas

- New 10,000 SF City Hall
- New 5,000 SF Public Works Complex
- Conversion of the existing City Hall into a new Justice Center

Austin Community College – Austin, Texas

- Cypress Creek Campus Expansion
- New Elgin Campus

Associations &

Affiliations:

Certified Construction
 Contract
 Administrator,
 Construction,
 Specifications Institute

The Burt Group Qualifications

Submitted by:

The Burt Group

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Austin, Texas 78758

512.275.0881

burtgroup.com

About The Burt Group

Strength in our numbers.

The Burt Group is a leading general contracting firm delivering complex, cutting-edge, and transformative interiors and buildings. An award-winning leader in construction, we pride ourselves on our resolute focus on integrity, safety, and agile project completion. We are committed to success and quality. We are an advocate to our clients from the onset of project engagement to final closeout.

The Burt Group is proficient in completing top quality construction with maximum efficiency and minimum time. Through careful planning in the pre-construction phase, we consider the project requirements as well as the availability of everyone involved. The Burt Group has extensive experience working with projects of this nature and understands the necessary commitment in personal resources during both preconstruction and project execution. The strength of our staff is in our numbers and breadth of collective experience. The individuals selected for this project team were specially chosen due to their experience and familiarity with this type of work. Our philosophy is to complete our projects with a Burt Group team whose collective skill sets are best matched to the work at hand. We bring the best possible construction resources to bear.

At The Burt Group we continue to make every effort to stay ahead of market trends providing paramount resources and operational excellence for the ultimate customer satisfaction. Our mission is to be the best general contractor for our clients. Being that The Salvation Army projects are of humanitarian nature, we are pleased to put our best efforts forward in assisting your team in achieving the best value and design. The Burt Group identifies with the substantial impact The Salvation Army has on the community and the important role it plays nationwide.

Project Approach and Execution Plan

Our experience with philanthropic work.

At The Burt Group, we believe having an execution plan is critical in order to meet the needs of the project. For us, this plan begins during the preconstruction process. We believe preliminary cost estimating, scheduling, and value engineering assistance are key components to executing successful projects. Our goal as we enter into the preconstruction process is to provide the project team with the information necessary to make informed decisions that will maximize The Salvation Army requirements while recognizing any budgetary constraints.

Preconstruction Process:

- **Project Evaluation:** Examine client needs and expectations of the project, define scope, and identify project components.
- **Budgetary Analyses:** Provide detailed internal take-offs, recognition of quantities and units used to establish estimates based off of current pricing received in the market.
- **Virtual Construction:** Assistance in identifying Value Engineering opportunities and constructability review.
- **Value Engineering:** Break-out components of the project and analyze impact areas; provide alternate solutions, including cost, schedule and quality impact.
- **Constructability Review:** Review of construction documents, evaluate materials, systems and delivery, identify areas of concern, involve subcontractors and vendors, and provide alternate solutions.
- **Cost Control:** Develop estimate and cost methods, provide detailed cost breakdown, solicit subcontractor input, prepare final project cost estimate, and if requested, assist in project cash flow management.
- **Scheduling:** Define all construction activities, prepare preliminary and final schedules, develop project sequencing plan, and solicit subcontractor input.
- **Procurement Management:** Identification of all long lead items, prequalifies equipment, and material vendors.
- **Bid Packaging and Subcontractor Solicitation:** Development of bid packages for each trade, solicit participation by selecting pre-qualified subcontractors from our established database, ensure 3-5 subcontractor competitive bids in each trade.
- **Safety:** Verify compliance with federal, state and local regulations, and provide and acknowledge project safety plan.
- **Project Layout:** Develop site staging plan, coordinate site and building layout, and oversee all mobilization activities.
- **Permitting:** Permits, site security, and safety.

Achieving Best Value:

- **Capitalize on best value:** Our primary approach to any project is to capitalize on best value. We vet all subcontractor pricing in light of our own detailed internal take offs and estimates to level the scope proposed in each trade line. By doing so, we are able to ensure both transparency and greatest value for the scope of work and can effectively compare each subcontractor's proposal.

- **In-kind donations:** We understand donations of goods and services are the key components that allow a nonprofit organization to thrive. We will put our best efforts into identifying possible areas in which in-kind donations are possible through our suppliers and subcontractors. We believe an enormous component to in-kind donations begins with the development of relationship between donor and recipient. Our time in the industry has allowed us to develop fundamental relationships with subcontractors and suppliers, who we can source in order to maximize these efforts.
- **Expedited Payment:** While pricing the Big Brothers Big Sisters Mentoring project, our vendors were able to offer a reduced cost based on the expedited payment terms put in place
- **Split Savings Clause:** Incentive put in place to aide in reducing cost

Traditionally speaking, The Burt Group's preconstruction approach and GMP development bring exponential value to any project and allow our clients to capitalize on their investment. Our vast knowledge and resources in the subcontractor market coupled with our aggressive pricing provide substantial value to the client over our competitors. Clients in particular Rise School of Austin and Big Brothers Big Sisters have enjoyed significant savings by selecting The Burt Group over our competition.

Construction Process:

- **Scheduling:** Define all construction activities, prepare final schedule, develop project sequencing plan, solicit subcontractor input, and maintain and adjust schedule throughout the life of the project.
- **Safety:** Verify compliance with federal, state and local regulations, and provide and acknowledge project safety plan.
- **Project Layout:** Develop site staging plan, coordinate site and building layout, and oversee all mobilization activities.
- **Project Management:** Coordinate and direct all subcontractor activities, provide survey and layout controls, hold weekly progress meetings, and submit progress reports.
- **Cost Control:** Maintain estimate and cost methods, adhere to cost breakdown, solicit subcontractor input, track and report payments and if requested, assist in project cash flow management.
- **Change Management:** When necessary, manage change orders for added or deleted scope of work to the contract, solicit subcontractors for revised pricing and input, and submit for owner approval.
- **Quality Control Assurance:** Include specific quality guidelines and expectations, and conduct appropriate testing.
- **Overall Construction:** Implementation of project strategy and objectives.
- **Owner Occupancy:** Provide certificate of occupancy, and prepare and coordinate all manuals and warranties.
- **Warranty:** Immediate response Service.

Through organization and delegation of roles and responsibilities, our project team is able to manage and control procurement and construction. The Burt Group details responsibilities of how the team will exercise control over critical project deliverables including schedule, budget, submittals, RFIs, general project correspondence, safety and project close-out. Our distribution of progress reports and continuous communication with the project team will ensure the satisfaction of The Salvation Army.

Relevant Project Experience



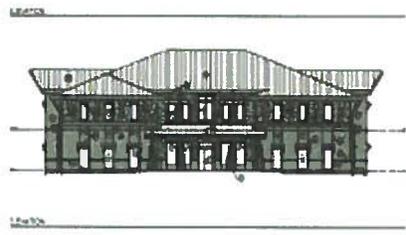
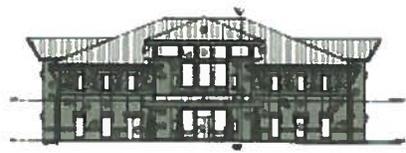
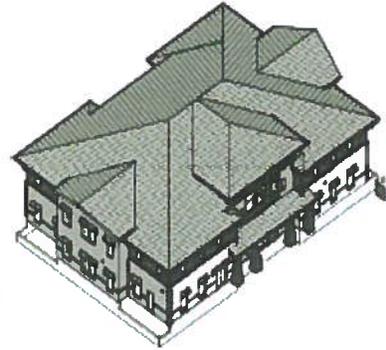
Rise School of Austin

Architect: O'Connell Robertson
Location: Austin, Texas



Seton Highland Lakes

Architect: O'Connell Robertson
Location: Austin, Texas



Big Brothers Big Sisters New Mentoring Center

Architect: O'Connell Robertson
Location: Manor, Texas

Tommy Burt

President

Tommy founded The Burt Group to bring a new standard to the construction industry, driven by his focus to build a diverse and progressive firm that focuses on clients' needs and reflects Austin's innovation and energy. With 20 years of experience in the industry, Tommy's strengths include commercial interiors, healthcare, and ground-up developments, specializing in corporate workplace environments. He has successfully managed over 16 million square feet of commercial interiors and other construction projects valued at approximately \$1.5 billion. To meet client needs, he has developed a new team dynamic that provides a more comprehensive, customer-service driven approach to managing projects. Tommy received a Bachelor of Arts in Marketing from the University of New Mexico.



tommy@burtgroup.com

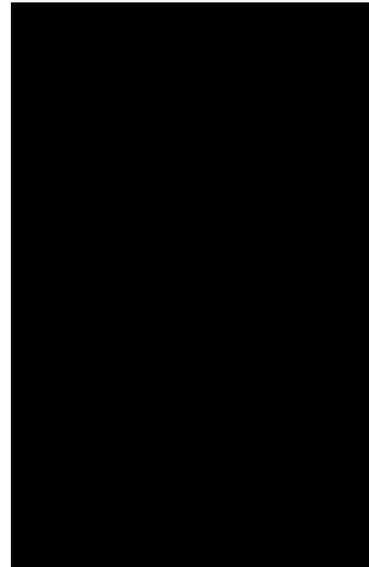
512.275.0881

Project Responsibilities

- Principal
- During preconstruction, construction and post-construction, serves as quality control officer providing project oversight, recommendations and final approvals
- Attends meetings on-site if necessary and holds special meetings to ensure client's needs and expectations are met
- Oversees process management and project flow
- Strategically plans project teams to ensure the most well-qualified team members are assigned to the project
- Reviews and finalizes budgets and schedules
- Evaluates, reviews and recommends design with estimating team
- Oversight of project and personnel quality control
- Critical path problem solving

Project References

- Rise School at Austin
- St. Jude Medical
- Bazaarvoice
- General Motors IT Innovation Center
- The Advisory Board Company
- Electronic Arts & Bioware
- Cirrus Logic
- Microsoft



Joe O’Jibway

Vice-President of Construction & Project Executive

Joe brings his extensive construction experience to help spearhead The Burt Group’s construction management and pre-construction process. Joe’s focus includes ground-up development and large corporate interiors. He is responsible for overseeing day-to-day operations in support of The Burt Group’s mission and vision, while enhancing internal organizational processes and infrastructure. Joe has a wealth of construction management knowledge and experience, which helps him drive the success of the construction process from conceptualization to completion. He works diligently with his team to ensure projects are run efficiently, staying on budget, and being completed on-time. Joe is an alumni of Texas A&M University where he graduated with a degree in Bachelor of Science in Construction Management.



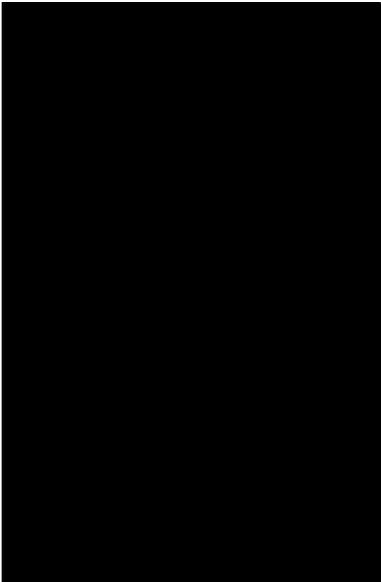
joe@burtgroup.com
512.681.4014

Project Responsibilities

- During preconstruction, construction and post construction, maintain open communication to ensure client stays abreast of construction activities
- Strategic Team Planning
- Review budgets and schedules
- Evaluate and review design with estimator
- Schedule review and maintenance
- Budget review and maintenance
- Manages the creation of effective construction budgets with multiple pricing exercises
- Pre-construction and CMAR consulting and advisory for architect, client and engineer team
- Support for cost savings and long lead item control
- Oversees production and reporting to verify accuracy and ensure client satisfaction
- Verifies project close-out expectations are met

Project References

- Emerson
- General Motors IT Innovation Center
- Cirrus Logic
- Radisson Hotels
- The Advisory Board
- Bazaarvoice
- St. Jude Medical
- Bioware and Electronic Arts



Daniel Bump

Project Manager

As a project manager for The Burt Group, Daniel is committed to ensuring quality on each of his projects. He brings his diverse experience from all areas of commercial construction - from the planning and pre-construction phase to post-occupancy of a wide variety of building types. Daniel provides extensive evaluations of projects and reviews each one from the pre-construction phase through the construction cycle. His ability to forecast and take preventive measures gives him an edge by always keeping him a step ahead. Daniel attended University of Texas San Antonio, and graduated with a BBA and a BA in Real Estate, Finance & Development.



daniel@burtgroup.com

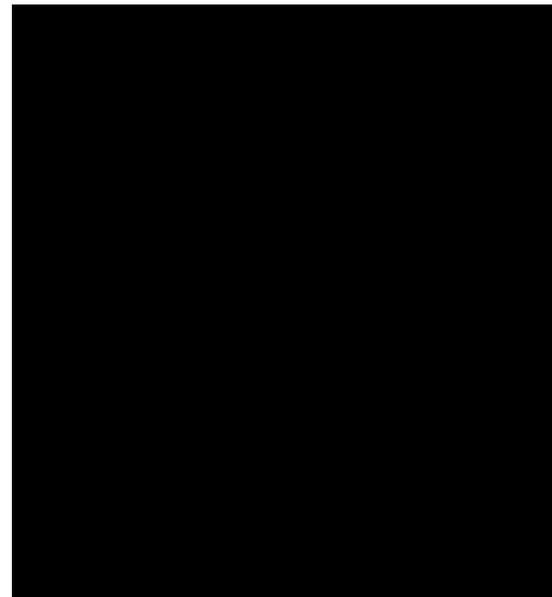
512.681.4031

Project Responsibilities

- Provides stages of commissioning, equipment installation, project closeout and warranty
- Creates and maintains schedule
- Reports progress, issues, and other matters critical to the success of the project
- Works with design team to find cost savings and find solutions to challenging construction projects
- Tracks equipment and material lead times
- Works with client and design team to intercept any issue that may arise and solve at ground-level
- Current on safety and design standards
- Reviews all change orders
- Manages field crew
- Procures permits, C/O's and TCO's
- Green/Sustainable Design Practices (LEED & B&C)

Project References

- Big Brothers Big Sisters
- University Medical, San Antonio
- Shops at Greenlawn
- Shops at 685 Pad I
- Shops at 685 Pad III
- Town & Country Commercial Emerson



Sam Hernandez

Estimator

Sam has more than ten years of construction industry experience. Sam joined the firm as an estimator in 2011. Sam is known for his accurate, detailed, complete and timely estimates for projects. Collaborating with clients, architects and engineers, Sam oversees efforts to define all costs and requirements within new projects. He works with subcontractors on a daily basis, maintaining relationships and fostering new industry partners to ensure competitive pricing. Sam also ensures the firm's project managers are well versed in the clients' requirements prior to the development phase. Before joining The Burt Group, he worked for Buffalo Framing and Truss as a designer and estimator.



sam@burtgroup.com

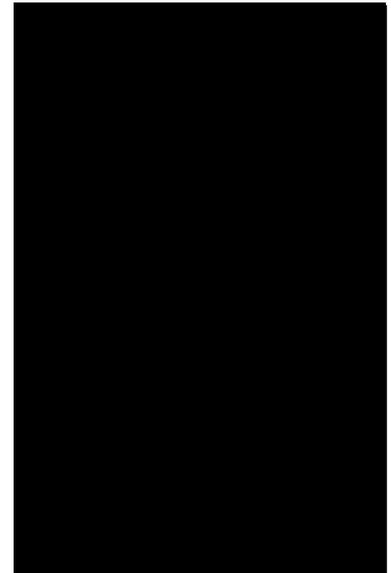
512.681.4027

Project Responsibilities

- Creates effective construction budgets through multiple pricing exercises
- Creates subcontractor lists for each project and sends all bid packages
- Pre-construction and CMAR consulting and advisory for architect, client and engineer team.
- Schedules and creates all paper work for onsite project walks and internal hand off meetings
- Qualifications of subcontractors
- GMAX creation
- Support for cost savings and long lead item control

Project References

- New Braunfels Spine & Pain Surgery Center & Clinic
- Littlefield Lofts
- Brown Traffic Products
- Chaotic Moon
- Main Street Hub
- Radisson Ballroom
- Chavez at the Radisson
- Texas Diabetes & Endocrinology



Jay McGilton

Superintendent

Jay is a Superintendent known for efficiently and effectively completing projects on time and within budget. His proactive approach and experience in managing a variety of construction teams and projects gives ensures quality on-site production. Jay helps lead the completion effort with his hands-on, practical technique. He has proven himself to be successful in creating effective communication between personnel, contractors and management team. Jay's specialized training and noted project accomplishments make him a huge asset to any Burt Group project team.



jay@burtgroup.com
512.394.2676

Project Responsibilities

- OHSA 30 and CPR trained
- Manages assistant superintendents and subcontractors
- Lead safety office at the project site and responsible for creating a safety plan
- Conducts weekly Tool Box Talks at the project site
- Reviews and evaluates design with estimating and project manager
- Identifies long lead items and advises on phasing if necessary
- Coordinates weekly team and subcontractor meetings
- Schedules & meets all inspections
- Communicates with field personnel, engineers, clients & project team
- On-Site 100% of the time
- Schedules deliveries and manages traffic in and out of site

Project References

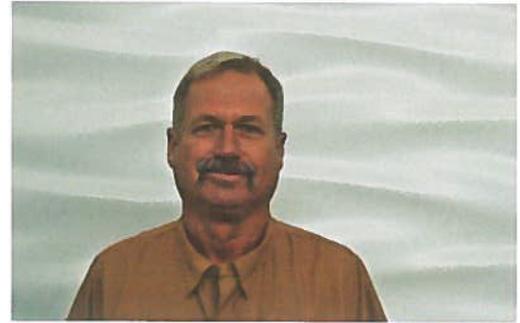
- Town & Country Commercial
- Samsung Austin
- Duren Hall at UT Austin
- Spring Condominiums



Wayne Sankey

Superintendent

As a Superintendent for The Burt Group, Wayne's extensive experience with ground-up projects and numerous renovations and finish outs makes him a key asset to the Burt Group's team. Wayne is responsible for oversight and supervision on key projects, adhering to timelines and budgets. Serving as the construction site's safety officer, Wayne goes above and beyond to ensure that every project gets completed safely and according to industry guidelines and regulations. A proactive leader, Wayne is adept at managing subcontractors and ensures that the client is always satisfied - avoiding problems before they arise.



wayne@burtgroup.com

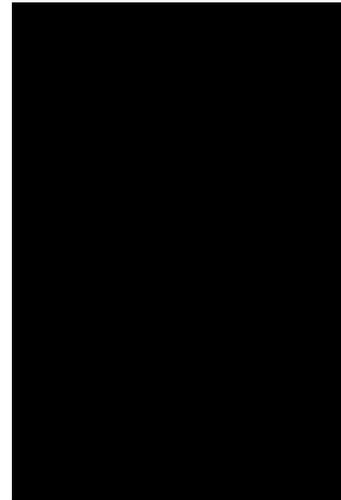
512.300.6496

Project Responsibilities

- OHS 30 and CPR trained
- Manages assistant superintendents and subcontractors
- Lead safety office at the project site and responsible for creating a safety plan
- Conducts weekly Tool Box Talks at the project site
- Reviews and evaluates design with estimating and project manager
- Identifies long lead items and advises on phasing if necessary
- Coordinates weekly team and subcontractor meetings
- Schedules & meets all inspections
- Communicates with field personnel, engineers, clients & project team
- On-Site 100% of the time
- Schedules deliveries and manages traffic in and out of site

Project References

- Rise School of Austin
- 2406 Manor Road Retail
- Peloton Real Estate
- Big Brothers Big Sisters



**Rental Housing Development Assistance
Application for Rental Development Financing**

Booth Village Apartments

Austin, TX

Tab 7 – Supportive Services

Attached is a letter from Foundation Communities indicating its willingness to coordinate supportive services. Also attached are resumes of key personnel of The Salvation Army who will be providing supportive services, as well as a supportive service budget. Funding sources for that budget are still being committed, but The Salvation Army has successfully raised money for these types of services before.



3036 South First
Suite 200
Austin, TX 78704

tel: (512) 447 2026
fax: (512) 447 0288

July 29, 2015

Salvation Army
c/o Colonel Gonzalez and Kathy Riddings
VIA EMAIL

Dear Colonel Gonzalez:

We are excited about your proposal to build the Booth Village in the St Elmo Neighborhood. Welcome! We are glad to be neighbors at Sierra Vista and Sierra Ridge. Our learning centers are just a short walk away.

We look forward to working with the parents and children from Booth Village to be part of the programs and services offered at the learning centers. All of our programs: pre-k, afterschool academics, adult education, fitness and nutrition classes, ESL, and more are free for neighbors and open for residents of Booth Village. We look forward to collaborating on outreach to residents so they are a part of our programs and services.

We are also very grateful for the many ways our organizations have partnered the last ten years in Austin to help families. The Passages Rapid Rehousing Initiative has been a great success to help many families with children. We can execute a formal MOU if the Booth Village is funded regarding the services at the learning centers.

Sincerely,

Walter Moreau,
Executive Director

Lieutenant Colonel Henry Gonzalez

Lt. Colonel Henry Gonzalez was appointed to serve pro tem as the Area Commander for the Austin Metropolitan Area Command in July 2012. Since his arrival the Colonel has worked diligently in creating awareness of the needs of The Salvation Army in service to the local community. This has led to an expansion of services to homeless women and children, the fastest growing population of those experiencing homelessness in the greater Austin area, and the need to construct new facilities to meet the ever growing demands of meeting basic human needs in our community.

Colonel Gonzalez was commissioned as a Salvation Army officer in 1968 from the College for Officer's training in Atlanta Georgia, and received a Bachelor of Science degree from the University of Texas, in Tyler.

In June 2008, Colonel Gonzalez was appointed Divisional Commander (to executive officer) of the Texas Division and served in this position until coming to Austin. Before this, Colonel Gonzalez was Divisional Commander of the Arkansas/Oklahoma division for four years. The Colonel has also served as Corps Officer (Houston Temple, Oak Cliff, Tyler and Waco) and Area Commander (Waco, TX., Mobile & Birmingham, AL., San Antonio & Houston, TX.). He has also served previously at Texas Divisional Headquarters as General Secretary and Dallas Area Coordinator.

Colonel Gonzalez has enjoyed a good working relationship with city, county, state and federal governments toward obtaining millions of dollars for homelessness and housing programs. In Texas, the Colonel was among the first Salvation Army officers to receive funding for Section 202 Housing for the Elderly programs.

To date Colonel Gonzalez has given more than 47 years of service to The Salvation Army both as a minister and as an executive officer, and he brings a wealth of knowledge to the command in Austin.

Kathleen Elizabeth Riding, MSSW



EDUCATION

- 1977 **UNIVERSITY OF TEXAS AT AUSTIN**, Austin, Texas
Master of Science in Social Work
Concentration: Social Planning and Program Development
- 1976 **UNIVERSITY OF TEXAS AT AUSTIN**, Austin, Texas
Bachelor of Arts (with honors) in Sociology
Concentration: Social Welfare Studies

EXPERIENCE

- 1995 - Present **THE SALVATION ARMY**, Austin, Texas
Director of Social Services
Responsibilities include oversight of social services programs provided for over 2,500 homeless men, women and families at TSA Social Service Center and Austin Shelter for Women and Children. Programs include: case management, employment services, child/family therapy, licensed childcare, and education. Additional duties include grant writing/grant management and administration of City, County, State, Federal and private foundation grants (approx. 3.5 million per year).including the Passages Program, Veteran's Homelessness Prevention Demonstration Project, Passages Rapid Rehousing Initiative, Supportive Services for Veteran's Families, Pathways and Partnerships Program, Healthy Communities Collaborative, Best Single Source Plus, and Emergency Food and Shelter Program. .
- 1993 - 1995 **SELF EMPLOYED**
Program Consultant/Grant Writer
Provided program development, program evaluation, grant writing and grant management services to non-profit agencies and public housing authorities such as YMCA of Austin, and housing authorities of Waco and Fort Worth..
- 1990 - 1993 **AUSTIN HOUSING AUTHORITY**, Austin, Texas
Director of Housing Services
Major responsibilities included management of Resident Services for all public housing developments, Public Housing Admissions Unit, and grants/contracts

- 1984 - 1990 **AUSTIN HOUSING AUTHORITY**, Austin, Texas
Director of Resident Services
Major responsibilities included management of social service programs for all public housing developments including emergency services, child care centers, organization of resident councils, coordination with community resources
- 1978 **AUSTIN HOUSING AUTHORITY**, Austin, Texas
Social Worker/Program Coordinator
Major responsibilities included program planning, casework, supervision of social services staff and student interns.
- 1977 **AMERICAN RED CROSS, Centex Chapter**, Austin, Texas
First Aid Instructor/Coordinator
Responsibilities included planning, coordinating and teaching Multi-Media and Basic First Aid Instructor Trainer Courses to licensed child care staff in South Texas under contract with Department of Human Services.
- 1976 -1977 **DEPARTMENT OF HUMAN RESOURCES**, Child Development Programs-Child Care Consultation Training Division, Austin, Texas
Graduate Field Placement
Assisted in planning and coordination of training programs for child care staff in licensed day care and 24-hour care facilities.
- 1976 **GRADUATE SCHOOL OF SOCIAL WORK,**
UNIVERSITY OF TEXAS AT AUSTIN, Austin, Texas
Research Assistant
Researched and compiled literature on employment and advancement of minorities in social work and public administration.
- OTHER**
- Personal Recognitions**
2015 Texas 125 Recognition, Salvation Army Divisional Headquarters
2014 Champions for Children, Junior Helping Hand Home for Children
2014 Salvation Army National Award for Excellence in Social Work
2012 Austin City Council Distinguished Service Award (SafeSleep Project)
2008 Spirit of Compassion Award, Foundation for the Homeless
- Program Awards**
2014 Austin Shelter for Women and Children, Salvation Army National Award for Excellence in Programming, TSA National Social Services Conference
2011 Veterans Homelessness Demonstration Project, Award of Excellence, Central Texas Veterans Health Care Systems
2009 The Passages Program, Community Action Network, Butler Award for Spirit of Compassion.
2000 The Passages Program, Community Legacy Award, Community Collaboration Awards

Jamille W. Ruebsahm

Experience 1/13 – Present	Salvation Army, Director of Development Austin, TX <ul style="list-style-type: none">• Manage all development functions, including: grant writing, donor relations, community engagement, volunteer support, brand management, marketing and public relations• Responsible for raising \$6,000,000 annually across direct mail, estate planning gifts, special events, major gifts, and support from corporations and foundations• Oversee \$14 million capital campaign• Lead a seven-person team and work closely with the Development Committee Co-Chairs of the Advisory Board to support strategy and implementation• Work closely with the Area Commander to effectively fund strategic priorities and growth
5/09 – 12/12	Texas 4000 For Cancer, Executive Director Austin, TX <ul style="list-style-type: none">• Transitioned from a University of Texas at Austin student-run organization to a professional non-profit• Managed all aspects of the organization, including:<ul style="list-style-type: none">– <u>Operations</u>: collaborated with Board of Directors, sponsors, volunteers, Program Director, student riders, interns, auditors, attorneys and vendors; led the revision of all policies, procedures and liability waivers associated with the cross-country bike ride; instituted documentation for ride training, safety and logistics– <u>Program</u>: collaborated with LIVESTRONG and MD Anderson Cancer Center to increase impact in the fight against cancer; managed more than ten events annually, including the Tribute Gala with more than 300 attendees; awarded UT's "Best Service Organization" in 2012; facilitated the formation of The University of Texas Cancer Alliance to coordinate communication across cancer-related organizations– <u>Development & Fundraising</u>: quadrupled annual sponsorships to \$120,000 by establishing new multi-year relationships with LIVESTRONG, Pfizer Oncology, Brown Distributing/Michelob Ultra, ThinkSport and PureSport; increased cumulative donations over my tenure by 73% to \$902,000 from \$522,000 over the prior three years; funded the \$300,000 Texas 4000 Distinguished Professorship at MD Anderson ahead of schedule; established a \$65,000 research endowment with UT's Department of Biomedical Engineering– <u>Budget & Finance</u>: managed all aspects of financial reporting; instituted accounting policies and procedures; managed operating expenses under budget each year– <u>Marketing & Communications</u>: managed national media outreach including press releases, website updates and all social media communications; led initiative to re-evaluate branding, resulting in a cohesive mission statement and logo
1/04 – 5/09	Deloitte & Touche, L.L.P., Manager – Audit and Enterprise Risk Services Austin, TX <ul style="list-style-type: none">• Designed internal controls for clients to ensure fiscal responsibility and accuracy of financial reporting, and facilitated organizational process improvements• Worked directly with client executives and boards of directors to manage timelines, costs and results• Managed engagements with annual revenues in excess of \$1.5 million, including developing project plans and budgets, determining appropriate staffing requirements, interacting with clients and overseeing execution• Directly sold services that produced more than \$700,000 of revenues in fiscal year 2007• Selected to participate in Focus Forward, a national annual forum for high-performing women within the firm
9/02 – 1/04	PriceWaterhouseCoopers, L.L.P., Experienced Associate – Assurance and Business Advisory New York, NY <ul style="list-style-type: none">• Worked with clients, including Goldman, Sachs & Co., Zurich Capital Markets, and Trade Web, to prepare and audit GAAP financial statements and related disclosures• Worked directly with senior management to test the accuracy and completeness of accounting procedures
Community Involvement	<ul style="list-style-type: none">• Association of Fundraising Professionals, Member ('13-Present)• MD Anderson – Advance Team Board Member ('14-Present)• Junior League of Austin – Researchers Chair, Grants, AIDS Services of Austin Chair, CARITAS, Community Council, Research Committee, Issue Based Community Impact Committee, Mobile Loaves & Fishes ('05-Present)• Texas 4000 For Cancer, Tribute Gala Co-Chair – Fundraising celebration that raised \$113,000 ('08)• Umlauf Sculpture Garden, Underwriting Co-Chair – Achieved record donations with 40% growth ('06-'08)
Education	The University of Texas at Austin, McCombs School of Business May 2002 Master in Professional Accounting; Bachelor of Business Administration <ul style="list-style-type: none">• Contributed more than \$40,000 of educational expenses through work and scholarships• <i>Vice President of Alumni Relations & Public Relations Co-Chair</i> – Texas Exes Student Chapter• <i>External Financial Director & Fundraising Vice-Chair</i> – Student Government• Honors include Dean's List, University Honors and receiving five scholarships

CAPABILITIES

- Over twelve years experience working within the field of social work in various capacities
- Excellent leadership skills including supervision experience and participation in management collaborations.
- Excellent communication skills as demonstrated by facilitation of groups, direct practice experience, outreach, grant writing, and community fundraising.
- Proficient knowledge of computers including word processing, desktop publishing, and database software
- Experience working with diverse populations.

EDUCATION

The University of Texas at Austin, Austin, Texas Master of Science in Social Work Administration and Planning	2004
The University of Texas at Austin, Austin, Texas Bachelor of Science, Social Work	2002

EXPERIENCE

Salvation Army, Austin, Texas 2005-Present

Assistant Director of Social Services/ Shelter Director Austin Shelter for Women and Children

- Lead case management and therapy team in development of long term plans for homeless women and their children
- Administer Social Services Programs for Williamson County Social Services Center
- Evaluate and revise programming for homeless families
- Participate in planning process for City Bond funded expansion of ASWC Shelter
- Assist in coordination of Capital Campaign for Salvation Army
- Supervise staff including security, monitoring, intake, child care, interns, and case management of 60 bed facility
- Prepare, monitor and review client records, financial reports, and payroll records
- Prepare and present statistical reports to agency committees and community partners
- Develop, implement, and enforce program policies and procedures
- Instruct and train staff on proper methods of case management and therapeutic intervention
- Conduct performance evaluations and make recommendations for hiring/firing
- Coordinate with community agencies to respond to the needs of clients served

Katrina Aid Today Central Texas Supervisor

- Supervise case managers and MSSW interns in Austin, San Antonio and Corpus Christi
- Recruit and train volunteers.
- Represent the Salvation Army at community meeting and Unmet Needs Committee
- Monitor and audit case files
- Conduct weekly staff meetings and supervision
- Coordinate with agency departments to provide direct financial assistance
- Facilitate monthly and quarterly reporting to agency and grant funders
- Maintain caseload of long term recovery clients
- Administer assessment tools for clients and provided appropriate referrals
- Design internal organizational system and program procedures
- Oversee database entry and repair for case managers
- Coordinate with FEMA and other nonprofit social services agencies
- Link with similar agencies to provide client assistance through LTRC

Austin Shelter for Women and Children/ Passages Case Manager

- Provide case management to homeless women and their children
- Provide crisis intervention and support to individuals
- Manage client intakes and direct financial assistance
- Facilitate psychosocial and educational groups for women

- Provide clients and families with appropriate referrals to other services.
- Coordinate with other agencies and HUD

Wright House Wellness Center, Austin, Texas

2004

Administration and Planning Intern

- Administer agency assessments
- Participate on fundraising and event planning committee
- Write grants and apply for agency funding
- Organize and participate in outreach events

Safe Place., Austin, Texas

2002-2003

Children's Counseling Intern

- Provide counseling to child victims of domestic violence and sexual assault
- Facilitate children's psychosocial group
- Provide after school care
- Maintain waiting list
- Participate in fundraising activities

Foundation Communities, Austin, Texas

2002

Generalist Intern

- Write grants and apply for agency funding
- Provide after school care
- Facilitate group

VOLUNTEER EXPERIENCE

Andrews Elementary

AIDS Services Austin

Baylor Health Care Systems

Hill Country Ride for AIDS

Wright House Wellness Center

David Ray, LCSW

Experience

Hope Alliance, Round Rock, TX

6/14-Present

- Case Manager/Shelter Advocate (Part time) for domestic violence shelter.
- Management and monitoring of residential domestic violence shelter (30-day stay); assisting clients with residential living (cooperative living, chores, etc.) and advocacy.
- Taking and triaging of domestic violence hotline crisis calls.

Salvation Army, Austin, TX

6/06-Present

- 2/2015-Present: Supportive Services for Veterans case manager. Assisting veteran families and singles with rapid rehousing toward homeless prevention.
- 2/2014-2/2015: Single Women case manager. Assisting single women in shelter with resources, job search, and mental health monitoring and conflict resolution.
- 4/2011-1/2014 – Veteran's Homeless Prevention case manager. Assisting veterans from recent conflicts (Iraq, Afghanistan) and older veterans with homeless prevention. Duties included eviction prevention, rehousing, case management (e.g. employment), monitoring of clinical issues including PTSD, and working in collaboration with Veteran's Affairs and Texas Workforce case managers.
- 6/2008-4/2011 – Passages case manager. Assisting shelter residents with housing case management including TBRA and public housing. Teaching Lifeskills classes (e.g. budgeting, understanding leases).
- 6/2006-6/2008 – Hurricane Recovery case manager. Assisting survivors of Hurricanes Katrina and Rita with case management including financial assistance, advocacy with FEMA and resettlement to disaster areas.

Education

University of Texas at Austin

5/2006

Master of Science in Social Work. Internships included Helping Hand Home in Austin and Communities in Schools.

Skills

Case management, clinical assessment, crisis management, advocacy, lifeskills teaching, planning for post-case management, resource location, housing.

Jay Filderman

Education: **Master of Science in Social Work**, University of Texas, Austin, TX - August 2000
Master of Business Administration, University of Texas, Austin, TX - July 1992
Bachelor of Arts, Dartmouth College, Hanover, NH - May 1987

Work Experience: **Shelter Director**, The Salvation Army, Austin, TX (Dec 2013- Present)

- Supervise and manage day-to-day operations of a 242 bed facility for homeless men, women, and families with 24/7 on call responsibilities
- Direct two Coordinated Assessment specialists responsible for screening community and Salvation Army individuals and families for housing
- Manage six shelter staff personnel responsible for case management and shelter services
- Prepare City and County monthly and quarterly reports to support grant funded programs
- Assist with management of Cold Weather Shelter (CWS) to provide safe shelter for residents
- Interact and liaison with Austin Police Department, Austin Travis County Integral Care, Adult Protective Services, and Child Protective Services to ensure safety of residents and shelter

Project Coordinator, Passages Program, The Salvation Army, Austin, TX (Oct 2001- Dec 2013)

- Supervise, coordinate and monitor day-to-day operations of the Passages Program, a HUD funded long-term case management program serving over 700-800 persons annually with a budget of \$538,081. Approximately 80% of adult participants obtained permanent housing during years of supervision.
- Manage the Tenant Based Rental Assistance partnership with The Housing Authority of the City of Austin, including enrollment, screening, and general coordination of 50-60 placements of transitional housing per year
- Coordinated a \$40,000 Utility Pilot Program between City of Austin and The Salvation Army that helped approximately 45 households overcome financial barriers and move into housing
- Manage three employees responsible for case management and administrative work to support homeless families

PRN Social Worker, Seton Medical Center, Austin, TX (August 2004 – Present)

- Provide medical case management involving crisis intervention, counseling, referrals to community resources, and placement to psychiatric facilities

Field Instructor, Texas State School of Social Work, San Marcos, TX (Jan. 2012 – April 2012)

Field Instructor, University of Texas School of Social Work, Austin, TX (Jan 2003 – May 2004)

- Supervised a Master of Social Work student from Texas State working with a Passages case manager
- Supervised a Bachelor and Master of Social Work student from The University of Texas working with The Salvation Army

Case Manager, Passages Program, The Salvation Army, Austin, TX (July 2000 - Oct 2001)

- Case managed and advocated for families, conducted home visits, developed service plans, and linked clients with community resources on issues pertaining to housing, budgeting, parenting, mental health, and substance abuse

University of Texas School of Social Work, Austin, TX

Teacher's Assistant, Grief Counseling

(Spring 2000)

Teacher's Assistant, Loss and Grief

(Fall 1999)

Para Professional Counselor, Austin Travis County Mental Health/Retardation (Jan 1999 - Oct 2000)

- Provided telephone crisis counseling and suicide prevention
- Provided mental health referrals to individuals for local services

Licenses:

Certified Field Instructor, March 2004; **LMSW**, May 2002

FRANCES ELLIOTT



EDUCATION

Bachelor of Business, Accounting, Eastern New Mexico University Portales, New Mexico
Associates Degree, Cisco Jr. College, Cisco, Texas,

CAREER EXPERIENCE

The Salvation Army 2000-present

- Finance Manager-All financial duties, bookkeeping, reporting, auditing, grant finances, and budgets.

Medical Management 1995 – 2000

- Accounting for anesthesiologist and radiologist practices. Bookkeeping, payroll, and reporting for individual doctors as well as their group practice.

Goodman Dental 1993 – 1995

Wilson Furniture 1991 -1993

Evelyn Tybor, CPA 1989 – 1991

BUDGET SOCIAL SERVICE SUPPORT BOOTH VILLAGE APARTMENTS

BUDGET SOCIAL SERVICE SUPPORT BOOTH VILLAGE APARTMENTS				
				Description
INCOME				
	Year 1	Year 2	Year 3	
Rental Income, Foundation, Private Donors				
TOTAL INCOME	84,538	80,028	81,630	
EXPENSES				
Employees				
Case Manager	36,000	36,720	37,454	1 FTE Case Manager, \$36,000 annual salary. 2% increase YR2 and YR3
Case Manager Assist	15,600	15,912	16,230	1 PTE- \$15.00 per hour x 20 hours per week , 2% increase YR2 and YR3
Employee Tax & Benefits	14,953	19,671	20,046	
Subtotal	66,553	72,303	73,730	Total Personnel Cost
Office Supplies	1,000	1,100	1,200	
Photocopies	1,000	1,050	1,060	
Printer Supplies	500	525	550	Toner, maintenance, and other printing supplies
Computers (10)	9,000			Purchase of 10 desks computers, software and printers to equip a multi-purpose computer learning lab for the families to use and life skills training on site.
Computer Desk & Chairs (10)	1,535			Computer Desks & Chairs \$153.49 per set (10) To furnish the family multi-purpose learning lab.
P.C. Parts	500	500	500	
Program Supplies	1,500	1,550	1,565	
Communications: Internet Expenses	1,200	1,200	1,200	
Postage: Postage Expense	150	150	150	
In-Town Travel: Mileage	1,000	1000	1,000	Travel cost for the purpose of coordinating case management services for residents. Travel reimbursement rate at .57 per mile
Staff Training	600	650	675	Professional Seminars
Subtotal	17,985	7725	7,900	
			81,630	
Total Expenses	84,538	80,028	81,630	

The funding for the supportive service to be offered at Boone Village Apartment will be raised from foundations and private donors. This is currently the method used to fund the supportive services programs used at our existing social services center. The Salvation Army has a donor base that is dedicated to the support of our social service programs. Past funders that The Salvation Army will be applying for funding are listed below:

- Carl C. Anderson & Marie Jo Anderson Charitable Foundation
- Donald D. Hammill Foundation
- Lola Wright Foundation
- Redman Foundation
- Shield-Ayres Foundation
- The Roy & Joann Cole Mitte Foundation
- Texas Methodist Foundation



THE SALVATION ARMY POLICY STATEMENT ON RELATIONSHIPS WITH OTHER GROUPS AND ORGANIZATIONS

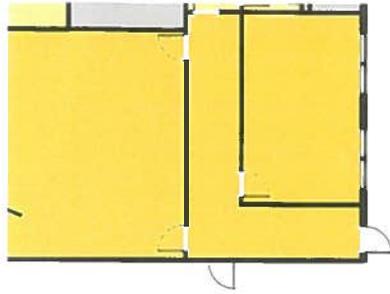
The Salvation Army in the United States works cooperatively with many groups — governmental, social service, civic, religious, business, humanitarian, educational, health, character building, and other groups — in the pursuit of its mission to preach the Christian Gospel and meet human need.

Any agency, governmental or private, which enters into a contractual or cooperative relationship with The Salvation Army should be advised that:

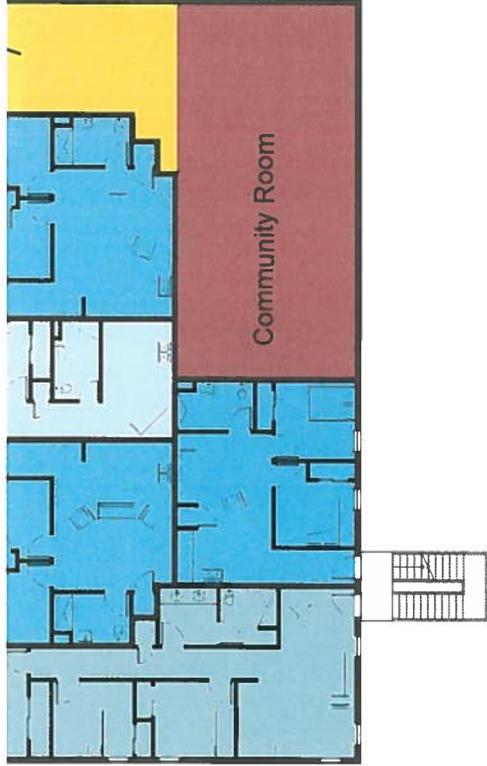
1. The Salvation Army is an international religious and charitable movement, organized and operated on a quasi-military pattern, and is a branch of the Christian church.
2. All programs of The Salvation Army are administered by Salvation Army Officers, who are ministers of the Gospel.
3. The motivation of the organization is love of God and a practical concern for the needs of humanity.
4. The Salvation Army's provision of food, shelter, health services, counseling, and other physical, social, emotional, psychological and spiritual aid, is given on the basis of need, available resources and established program policies.

Organizations contracting and/or cooperating with The Salvation Army may be assured that because The Salvation Army is rooted in Christian compassion and is governed by Judeo-Christian ethics, The Salvation Army will strictly observe all provisions of its contracts and agreements.

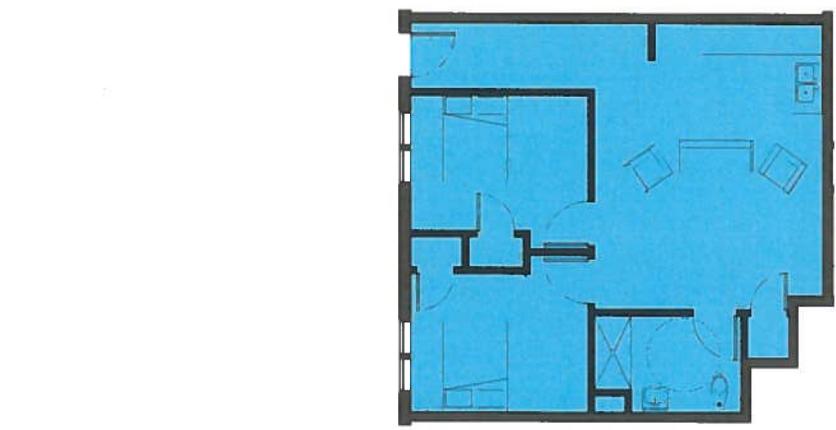




Administration Building



Unit A - First Floor Plan (Second Floor to Match Unit B/C Plan)

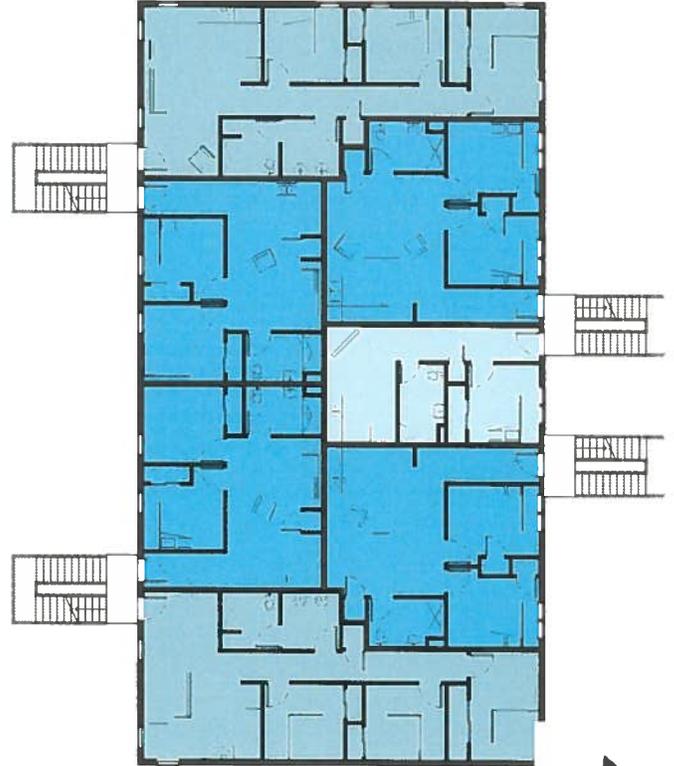


Each

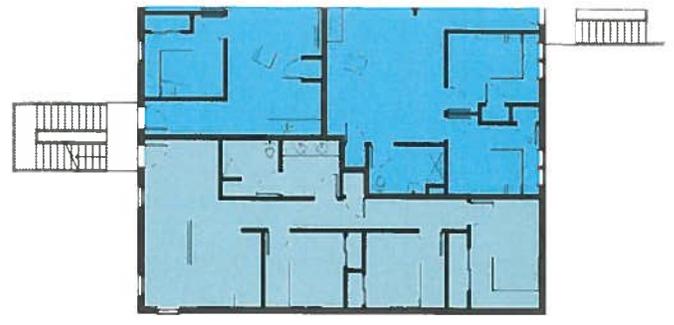
Two Bedroom Plan - 25 Units at 650/750 sf Each

1,050 sf Each

Family Transitional Housing
Conceptual Campus Design

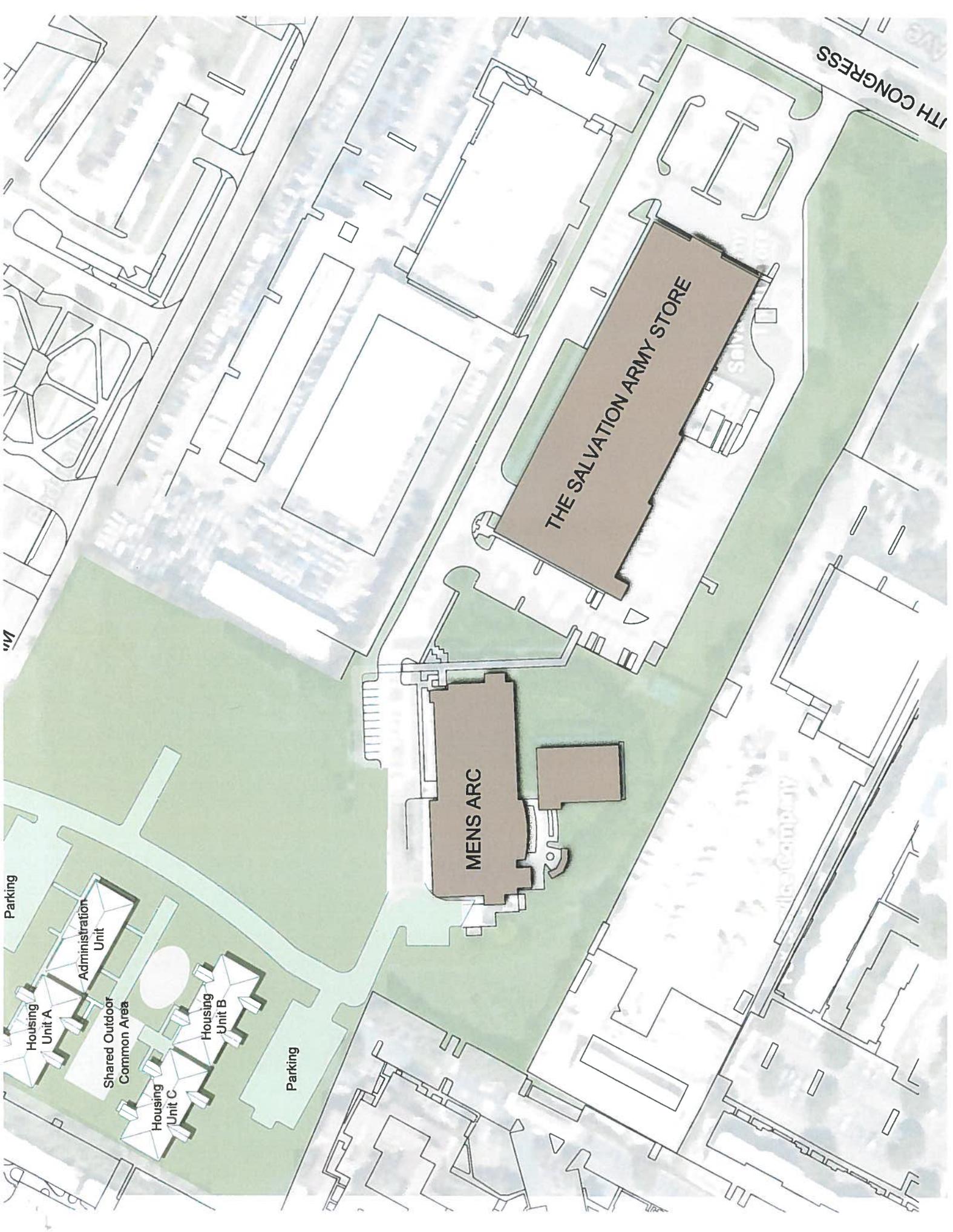


Unit B - First + Second Floor Plan



Unit C - First + Second Floor





11TH CONGRESS

THE SALVATION ARMY STORE

MENS ARC

Housing Unit A

Administration Unit

Shared Outdoor Common Area

Housing Unit B

Housing Unit C

Parking

Parking