



HOUSING DEVELOPMENT ASSISTANCE (RHDA/OHDA)

Application for Housing 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 Austin Strategic Housing Blueprint and policy direction from the Austin City Council.

Applicant Information

(If the developer involves multiple entities, is a partnership or joint venture, please provide the requisite information for each and identify the entity that will serve as the "lead" organization.)

Developer Name

Project Transitions, Inc.

Owner Name

Project Transitions, Inc.

Street Address

7101 Woodrow Avenue Unit B

City

Austin

State

TX

Zip

78757

Contact Name

Jennifer Hicks

Contact Telephone

512-203-4417

Contact Email

jennifer@truecasa.net

Federal Tax ID Number

74-2502171

D-U-N-S Number (visit www.dnb.com for free DUNS#.)

788375921

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.*

Legal Name of Developer/Entity

Project Transitions, Inc.

Title of Authorized Officer

Interim Executive Director


Signature of Authorized Officer


Date

INSTRUCTIONS: Applications will be reviewed on a quarterly basis. All applications submitted in the review period that achieve the minimum threshold score will be reviewed by an internal panel of NHCD staff. All awards will be made by the AHFC Board of Directors. To be considered for an award, please complete this application electronically, print, sign, and deliver to:

Department of Neighborhood
Housing and Community
1000 East 11th Street
Austin, Texas 78702
Attn: James May
Community Development Manager

City of Austin

APR 26 2019

NHCD / AHFC

TRUE CASA CONSULTING, LLC

September 20, 2019

James May
City of Austin - NHCD
1000 East 11th Street
Austin, Texas 78702

RE: RHDA Application – Burnet Place Apartments

Dear Jamey:

I am pleased to provide this **update to the second submission application** for RHDA funding on behalf of Project Transitions, Inc. for the development of Burnet Place Apartments – an intensely supportive and deeply affordable housing community for persons living with HIV/AIDS at a phenomenal, amenity-rich and transit-connected site in Austin. The original funding application was submitted April 26, 2019 and was awarded \$2,901,992 on August 8, 2019 to fund acquisition of the site. Project Transitions is so grateful for this support and will be closing on the acquisition of the site on September 26, 2019. We ask that the remaining application amount, as updated and indicated in the revised application, be considered in this current round.

In this application, Project Transitions is asking for:

\$3,098,008 (a total of \$6M)
61 units of intensely supportive and health-enriched housing
low-barrier housing for persons with extremely low incomes who are homeless
\$98,360 per unit (total RHDA funding)

HITS ON CITY COUNCIL PRIORITIES: HOUSING ON TRANSIT CORRIDORS, DEEPLY AFFORDABLE UNITS AT 30% MFI, LOW-BARRIER HOUSING FOR HOMELESS, BUILDING CAPACITY OF LOCAL NON-PROFITS TO BE HOUSERS

HOW DID WE GET HERE? When PT first applied for City funding for the Burnet project in April, we had no way to anticipate the new funding limits imposed by the City in an understandably iterative process. We put this project together in good faith that the City would be the anchor funder. **The City has shown that commitment with the award of \$2.9M to acquire the site, but we need more to build the project.** There have been many meetings with Project Transitions' Board of Directors, staff and the project development team in order to make the hard decisions associated with this funding ask. Project Transitions is stretching in an attempt to meet the City halfway. The reality is that the site can fit approximately 78 units with Affordability Unlocked, but we are unable to assemble a realistic funding stack without subjecting this mission-based non-profit to significant financial risk. And so, we move forward with an application for 61 units with a back-up plan in place. That back-up plan includes an on-site pharmacy or clinic in partnership with an HIV/AIDS focused entity and/or relocating Doug's House Hospice to the back-side of the property (separate from this application) and selling the current Doug's House location. Hours have been spent with wringing hands to decipher the most realistic path forward for this project. We believe 61 units with the anticipated budget allows us to develop the site near its full potential with a back-up plan to max out site if partnerships and opportunities allow.

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MITIGATION FACTORS – Please find below a review and refresh of the significant factors that we feel mitigate any risk that the City might have in awarding \$6,000,000 (total) to this well-deserving and impactful project:

- 1) **TIMING** – If we are approved for funding, this project will be on the ground and leasing up in less than 18 months. We will be acquiring the site, in conjunction with the City, on Sept. 26th. We have submitted and received final comments on a Concept Site Plan. This Concept Site Plan is good for 12 months and will shave at least three months off the site permit process essentially cutting the wait for site permits in half. We have full scope proposals from both our architect and civil engineer and are just waiting to find out the fate of this funding application in order to lock in the number of units and begin absorbing the costs required to finalize construction documents. In coordination with the Owner's Representative firm for this project, we have reviewed the construction numbers and are agreed that the budget is achievable with today's costs.

Another key timing issue is the submission of the TDHCA funding application – a \$3M essential anchor for the capital stack. We must know the amount of City funding committed so we can lock in the number of units and get our architectural plans and site plan finalized to submit with the TDHCA application. If we are postponed to a future funding round with the City funding, not only will this kill the momentum of the project but it might ruin our chances for the TDHCA funding if other projects jump in line ahead. We are ready to go and are confident that we can deliver units quicker than other pending applications that have not even started the 4% credit/bond allocation process.

- 2) **SUPPORTIVE HOUSING WITHOUT TAX CREDITS** – This project is deeply supportive housing that will be covered with an operating subsidy contract through HOPWA. This HOPWA funding enables the project to serve persons with incomes below 30% MFI – an income target that is not achieved with tax credit financing. The 9% HTC program is uber-competitive with only three projects being awarded a year in Austin area. The 4% program requires a project to take on debt which the HOPWA funding will not cover. Neither program is feasible. Instead, this project is being put together by a realistic capital stack that includes a larger ask of City funding than is typical of a standard tax-credit financed, affordable housing project. Here is why:

- With an average unit size of 434 square feet – units are small. Smaller units cost more per square foot as the same plumbing and electrical costs go into these units with less square footage to spread out those costs.
- Supportive Housing includes more expansive common area spaces – supportive service staff offices, meeting rooms, resident lounges and courtyards, commercial kitchen for food prep and service. This project will focus on spaces that integrate healthcare into housing such as telehealth and space for visiting health professionals.
- The site on Burnet Road is a highly desirable location in close proximity to medical, retail, employment and recreational amenities. There is a bus stop right on the site with a pedestrian walkway and beacon to easily access the bus across Burnet Road. A site like this is more expensive than a large undeveloped tract of land farther from amenities.
- 9% credits should make up about 60-70% of the capital stack whereas 4% credits should make up about 30% of the capital stack for a project. These projects are often larger with more units and therefore the funding asks from the City will ALWAYS be less per unit. However, I don't believe it is the intent of the City to only fund tax credit financed projects?

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- 3) **HOMELESSNESS** – Our City is at a crux right now about how to approach the complex and multi-faceted issue of homelessness. We all know that there is not a singular solution and that it takes a web of resources to get and keep people housed. Project Transitions does just this and does so with alarming success rates. They are uber-focused on their mission of ending the HIV and AIDS epidemic – and the hotbed of that epidemic lays within Austin’s homeless population where three times the number of people are HIV positive than in the general population. Project Transitions don’t look at a person’s past or how they came to PT, they only look at how to get that person off the street, into care and stably housed. A vital component of HIV/AIDS care is **HOUSING**, which provides a place to store medication and food, a dependable contact location, and emotional security.

A few staggering facts:

- 89% of persons come to PT not in medical care nor HIV medicine adherent – meaning they are likely transmittable. **After being housed, 95% are in medical care and HIV medicine adherent and likely not transmitting.**
- 79% of persons come to PT from homelessness, 89% have mental health diagnosis and 67% have substance abuse disorders.
- 83% of PT’s current residents have incomes below 30% MFI.

4) **A SOLID TEAM WITH A THOUGHTFUL APPROACH:**

- The architect – Michael Hsu Office of Architecture - has completed a conceptual plan that addresses the unique challenges faced by the target population of People Living with HIV and AIDS coupled with prior homelessness and co-occurring disorders. **The plan is communal, contemplative, therapeutic, welcoming and bright.** The buildings will take advantage of Burnet Road while scaling down in consideration to the single-family neighborhood along the backside. These conceptual plans have been included with this application update to document the forward progression of the project.
- Project Transitions **presented to the Wooten Neighborhood Association on July 8, 2019.** The project was very well-received with great questions and open communication. Project Transitions plans to present an update to the Wooten NA at either their September or November upcoming meetings.
- An owner’s rep consultant and project manager, Joe Tracy with Capital Project Management, has been added to the development team. Joe will bring an unparalleled degree of project management to the development team and will assist in **keeping the project on time and, most importantly, within budget.**
- Since original application, **an additional \$1.8M** has been added to the sources of the project: TDHCA is increasing the application amount for their MFDL gap funding program from \$2M cap to a \$3M cap, PT will sell their existing 8-unit project – Highland Terrace – upon completion of Roosevelt Gardens when residents can be relocated and project proceeds applied to Burnet, PT will launch a capital campaign to meet the \$300,000 fundraising reach, back-up and back-fill can come from any developer fee earned for Roosevelt Gardens.
- This project is certified to participate in the **Affordability Unlocked program.** One of the first projects to go through the process!
- We have built a cohesive team that has seamlessly progressed through each design and development milestone. It is imperative that the City of Austin funding be considered under this current round as to not hold up this forward progression. In Austin’s scalding

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real estate and development market, tapping the brakes on a project opens it up to new rules and, ultimately, higher costs. **Please give us the boost to keep this important project moving.**

Federal + Texas + Austin goals are fully aligned to end the transmission of HIV by 2030. Project Transitions cannot truly achieve the goal until EVERYONE in Austin with HIV has a roof over their head and access to medical care. This is a public health mandate framed within an affordability crisis.

We are so thankful for this opportunity and appreciate your partnership to help end the AIDS epidemic in Austin.

Best,
Jenn Hicks

Project Summary Form

1) Project Name Burnet Place Apartments	2) Project Type 100% Affordable	3) New Construction or Rehabilitation? New Construction
4) Location Description (Acreage, side of street, distance from intersection) 8007 Burnet Road, Austin, TX 78757		5) Mobility Bond Corridor Burnet Rd
6) Census Tract 18.18	7) Council District District 7	8) Elementary School WOOTEN EL
9) Affordability Period 40 years		
10) Type of Structure Multi-family	11) Occupied? No	12) How will funds be used? ion, Pre-development, and Cons

61 units = the majority of residents will have incomes below 30% MFI, but have to set rents to underwrite with TDHCA and construction lender

13) Summary of Rental Units by MFI Level

Income Level	Efficiency	One Bedroom	Two Bedroom	Three Bedroom	Four (+) Bedroom	Total
Up to 20% MFI						0
Up to 30% MFI	9	3				12
Up to 40% MFI	9	3				12
Up to 50% MFI	28	9				37
Up to 60% MFI						0
Up to 80% MFI						0
Up to 120% MFI						0
No Restrictions						0
Total Units	46	15	0	0	0	61

14) Summary of Units for Sale at MFI Level

Income Level	Efficiency	One	Two	Three	Four (+)	Total
Up to 60% MFI						0
Up to 80% MFI						0
Up to 120% MFI						0
No Restrictions						0
Total Units	0	0	0	0	0	0

15) Initiatives and Priorities (of the Affordable Units)

Initiative	# of Units	Initiative	# of Units
Accessible Units for Mobility Impairments	61	Continuum of Care Units	9
Accessible Units for Sensory Impairments	61		

Use the City of Austin GIS Map to Answer the questions below

- 16) Is the property within 1/2 mile of an Imagine Austin Center or Corridor? ☒ Yes
- 17) Is the property within 1/4 mile of a High-Frequency Transit Stop? ☒ Yes
- 18) Is the property within 3/4 mile of Transit Service? ☒ Yes
- 19) The property has Healthy Food Access? ☒ Yes

20) Estimated Sources and Uses of funds

Sources		Uses	
Debt	0	Acquisition	2901000
Third Party Equity	800000	Off-Site	0
Grant	1500000	Site Work	381919
Deferred Developer Fee	\$ 284,706	Sit Amenities	40000
Other	5901992	Building Costs	6407093
City of Austin	3098008	Contractor Fees	
		Soft Costs	1101838
		Financing	182500
		Developer Fees	570356
Total \$	11,584,706	Total \$	11,584,706

Third party equity includes \$500k in proceeds from the sell of Highland Terrace and \$300k in private fundraising. PT launching a capital campaign.

"Other" includes the previously awarded \$2,901,992 in City funding and \$3M from TDHCA.

Development Budget			
	Total Project Cost	Requested AHFC Funds	Description
Pre-Development			
Appraisal	5,000		
Environmental Review	15,000		
Engineering	238,150		engineering and green consultant
Survey	6,500		
Architectural	522,000		
Subtotal Pre-Development Cost	\$786,650	\$0	
Acquisition			
Site and/or Land	2,900,000	2,900,000	contract price
Structures			
Other (specify)	1,000	1,000	closing costs
Subtotal Acquisition Cost	\$2,901,000	\$2,901,000	
Construction			
Infrastructure			
Site Work	421,919	3099000	
Demolition	159,500		demolition of front part of structure
Concrete	828,310		
Masonry	97,313		
Rough Carpentry	165,822		
Finish Carpentry			
Waterproofing and Insulation	190,929		
Roofing and Sheet Metal	224,989		
Plumbing/Hot Water	449,523		
HVAC/Mechanical	480,534		
Electrical	553,616		
Doors/Windows/Glass	273,849		
Lath and Plaster/Drywall and Acoustical	1,011,770		
Tiel Work	36,513		
Soft and Hard Floor			
Paint/Decorating/Blinds/Shades	315,352		
Specialties/Special Equipment	54,769		
Cabinetry/Appliances	116,941		
Carpet			
Other (specify)	1,105,912		asbestos abatement, GC fee and profit, General Requirement:
Construction Contingency	341,451		5% contingency
Subtotal Construction Cost	\$6,829,012	\$3,099,000	
Soft & Carrying Costs			
Legal	25,000		
Audit/Accounting			
Title/Recordin	25,000		
Architectural (Inspections)	17,500		
Construction Interest	140,000		includes interest (12 months), fee and closing
Construction Period Insurance	35,000		includes builders risk and general liability
Construction Period Taxes			
Relocation			
Marketing	7,500		market study
Davis-Bacon Monitoring	12,500		
Other (specify)	805,544		reserves, developer fee, soft cost contingency, infrastructure
Subtotal Soft & Carrying Costs	\$1,068,044	\$0	
TOTAL PROJECT BUDGET	\$11,584,706	\$6,000,000	

Project Name	Burnet Place Apartments	
Project Type	100% Affordable	
Council District	District 7	
Census Tract	18.18	
AHFC Funding Request Amount	\$3,098,008	
Estimated Total Project Cost	\$11,584,706	
High Opportunity	No	
High Displacement Risk	YES	
High Frequency Transit	Yes	
Imagine Austin	Yes	
Mobility Bond Corridor	Burnet Rd	
SCORING ELEMENTS		Description
UNITS		
< 20% MFI	0	# of rental units at < 20% MFI
< 30% MFI	12	# of rental units at < 30% MFI
<i>District Goal</i>	1.80%	% of annual goal reached with units
<i>High Opportunity</i>	0.00%	% of annual goal reached with units
<i>Displacement Risk</i>	15.56%	% of annual goal reached with units
<i>High Frequency Transit</i>	5.18%	% of annual goal reached with units
<i>Imagine Austin</i>	5.18%	% of annual goal reached with units
<i>Geographic Dispersion</i>	9.23%	% of annual goal reached with units
<i>Mobility Bond Corridor</i>	10.93%	% of annual goal reached with units
SCORE	10	% of Goals * 20
< 40% MFI	12	# of rental units at < 40% MFI
< 50% MFI	37	# of rental units at < 50% MFI
<i>District Goal</i>	7.37%	% of annual goal reached with units
<i>High Opportunity</i>	0.00%	% of annual goal reached with units
<i>Displacement Risk</i>	63.55%	% of annual goal reached with units
<i>High Frequency Transit</i>	21.16%	% of annual goal reached with units
<i>Imagine Austin</i>	21.16%	% of annual goal reached with units
<i>Geographic Dispersion</i>	37.69%	% of annual goal reached with units
<i>Mobility Bond Corridor</i>	44.61%	% of annual goal reached with units
SCORE	29	% of Goals * 15
< 60% MFI	0	# of units for purchase at < 60% MFI
< 80% MFI	0	# of units for purchase at < 80% MFI
<i>District Goal</i>	0.00%	% of annual goal reached with units
<i>High Opportunity</i>	0.00%	% of annual goal reached with units
<i>Displacement Risk</i>	0.00%	% of annual goal reached with units
<i>High Frequency Transit</i>	0.00%	% of annual goal reached with units
<i>Imagine Austin</i>	0.00%	% of annual goal reached with units
<i>Geographic Dispersion</i>	0.00%	% of annual goal reached with units
<i>Mobility Bond Corridor</i>	0.00%	% of annual goal reached with units
SCORE	0	% of Goals * 15
Unit Score	39	MAXIMUM SCORE = 350
INITIATIVES AND PRIORITIES		
<i>Continuum of Care</i>	9	Total # of units provided up to 100 per year
Continuum of Care Score	3	(total CoC Units/100 + HF Units/50)*20
Access to Healthy Food	Yes	Within 1 Mile of Healthy Food (City GIS)
Continuum of Care Weighted Score	2	Mobility, Access to Jobs, Community Institutions, Social Cohesion
<i>2 Bedroom Units</i>	0	Total Affordable 2 Bedroom units
<i>3 Bedroom Units</i>	0	Total Affordable 3 Bedroom units
<i>4 Bedroom Units</i>	0	Total Affordable 4+ Bedroom units
Multi-Generational Housing Score	0	Multi-bedroom Unit/Total Units * 20
TEA Grade	87	Elementary School Rating from TEA
Multi-Generational Housing Weighted Score	0	Educational Attainment, Environment, Community Institutions, Social Cohesion, Ec
<i>Accessible Units</i>	122	mobility and sensory units
<i>Non-PSH, Non-Voucher Under 20% MFI</i>	0	Total units under 20% MFI
Accessibility Score	40	Accessible Unit/Total Units * 20
Metro Access Service	Yes	Within 3/4 mile of fixed route transit
Accessibility Weighted Score	10	Housing Stability, Health, Mobility, Community Institutions
Initiatives and Priorities Score	55	MAXIMUM SCORE = 200
UNDERWRITING		
<i>AHFC Leverage</i>	27%	% of total project cost funded through AHFC request
Leverage Score	18	25 - (% leverage * 25)
<i>AHFC Per Unit Subsidy</i>	\$50,787.02	Amount of assistance per unit
Subsidy per unit score	19	(\$200,000 - per unit subsidy)*25/\$200,000
<i>AHFC Per Bedroom Subsidy</i>	\$50,787.02	Amount of assistance per bedroom
Subsidy per Bedroom Score	19	(\$200,000 - per bedroom subsidy)*25/\$200,000
<i>Debt Coverage Ratio (Year 5)</i>	1.00	Measured at the 5 Year mark
Debt Coverage Ratio Score	0	Minimum = 1.0; Maximum = 1.5; 1.25 = best score
Underwriting Score	56	MAXIMUM SCORE = 100
APPLICANT		
FINAL QUANTITATIVE SCORE	150	THRESHOLD SCORE = 50
<i>Previous Developments</i>		
<i>Compliance Score</i>		
<i>Proposal</i>		
<i>Supportive Services</i>		
<i>Development Team</i>		
<i>Management Team</i>		
Notes		

From: Avioli, Lauren <Lauren.Avioli@austintexas.gov>
Sent: Friday, August 30, 2019 12:50 PM
To: jennifer@truecasa.net
Cc: Madge Whistler; Copic, Regina
Subject: Affordability Unlocked applications

Jenn & Madge,

I wanted to follow up with you on the status of your Affordability Unlocked applications for 8007 Burnet Rd and 5606 Roosevelt Ave. I apologize for the delay in getting back to you. We have been working back and forth with the Law Department to finalize a contractual agreement for all our participants.

8007 Burnet Rd

- **The application is complete and satisfactory.**
- I have used your RHDA funding application to document that you have site control for the property.
- I have been in contact with Anaiah Johnson, who is reviewing your concept site plan, to let him know that we will be certifying your project once the contract is signed.
- Next steps:
 - Execute contract with City of Austin pledging you will meet the affordability requirements for the length of the 40-year affordability period. This includes the required lease provisions and rent levels. I will send it over to you when it is ready. I continue to hope that it will be soon.
 - NHCD issues you the certification letter to add to your site plan application.

5606 Roosevelt Ave

- Please verify whether this development will participate in another density bonus program such as: Downtown Density Bonus, East Riverside Corridor Density Bonus, Lamar / Justin Lane Density Bonus, North Burnet-Gateway Density Bonus, MLK Jr. TOD Density Bonus, Micro-Unit Density Bonus, Planned Unit Development Density Bonus, Plaza Saltillo TOD Density Bonus, Rainey Street Density Bonus, S.M.A.R.T. Single Family or Multifamily Density Bonus, University Neighborhood Overlay Density Bonus, Vertical Mixed Use Density Bonus. (This question was left blank in the application.)
- I have used your RHDA funding application to document that you have site control for the property.
- The Building Official has verified that rehabilitation of the existing units is not practicable, as required by the ordinance.
- Next steps:
 - Provide notice to existing tenants of the redevelopment of the property, as required by the ordinance. We are working on the notice form and I will send it to you late next week. We can meet or have a phone call to discuss the best timing and process for delivering this notice when we have the document ready.
 - Discuss process for providing relocation benefits, as required by the ordinance. We can also discuss this subject in our call/meeting regarding notice.
 - Execute contract with City of Austin pledging you will meet the affordability requirements for the length of the 40-year affordability period. This includes the required lease provisions and rent levels. I will send it over to you when it is ready. I continue to hope that it will be soon.
 - NHCD issues you the certification letter to add to your site plan application.

I'll be in touch late next week to set up a discussion for the notice form and relocation benefits. I will send the contract to you as soon as it is ready.



REQUIRED ATTACHMENTS

Burnet Place Apartments

By

Project Transitions, Inc.



Introduction:

Project Transitions, a private 501(c)(3) formed in 1988, is the only provider of low and no-cost hospice and recuperative care, transitional housing, and comprehensive, wrap-around support services for people living with HIV/AIDS in Central Texas. Project Transitions (PT) started as a small hospice facility and has grown to into a community that provides hope and dignity for those who have struggled with illness, stigma and lack of support. Over the past 27 years, PT has expanded to include Doug's House Hospice, Roosevelt Gardens, Highland Terrace, Community Housing programs and Top Drawer Thrift Store. PT's knowledge of their target population is unparalleled, the overwhelming need of their clients is unmet and the time is now for PT to once again expand their housing footprint.

This application represents the second project by Project Transitions, Inc. seeking RHDA funding assistance as part of a strategic plan to expand housing capacity. The first application for the re-development of Roosevelt Gardens was submitted on February 1, 2019 and is scheduled for City Council approval on May 9, 2019. This second project – Burnet Place Apartments - is a site acquisition and new construction that will yield 55 additional supportive housing units. The staff and board of Project Transitions have been waiting to take these steps for years and have spent that time conditioning the organization's structure and shoring up financial strength.

- **Hospice and Recuperative Care:**

Doug's House – Five beds of short-term, intensive recuperative care or end-of-life hospice care, as is appropriate, with 24-hour care from social workers, caregivers, and a Registered Nurse

- **Affordable, Intensely Supportive Housing:**

Roosevelt Gardens – 5606 Roosevelt Avenue – 22 units – Project Transitions has owned and operated since 1995

Highland Terrace – 7107 Guadalupe – 8 units – Project Transitions has owned and operated since 1998

- **Community Housing Program:** PT provides subsidized rent assistance and support services for those living offsite.

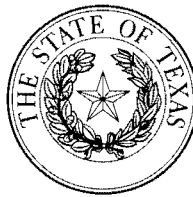
- **Support Services:** The critical pairing of housing to support services is the magic behind PT's work. PT offers an exhaustive list of wrap-around social services to help clients on the journey to independent living and recovery.



ATTACHMENT 1: APPLICANT ENTITY

b. Certificate of Status:

Please find Certificate of Status attached.



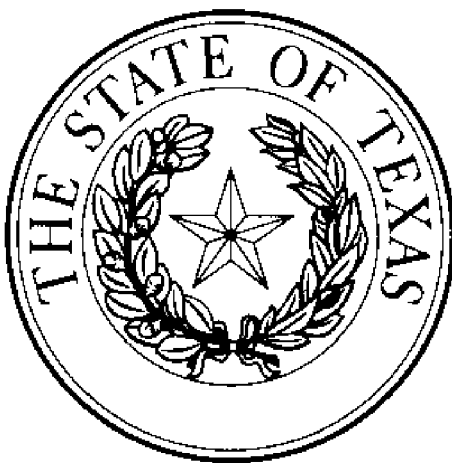
Office of the Secretary of State

Certificate of Fact

The undersigned, as Secretary of State of Texas, does hereby certify that the document, Articles Of Incorporation for PROJECT TRANSITIONS, INC. (file number 105621601), a Domestic Nonprofit Corporation, was filed in this office on February 19, 1988.

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

In testimony whereof, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in Austin, Texas on January 31, 2019.



A handwritten signature in black ink, appearing to read "David Whitley".

David Whitley
Secretary of State



ATTACHMENT 1: APPLICANT ENTITY

c. Applicant Capacity:

Project Transitions, Inc. has been part of the Austin social service safety net since 1988 when the organization was first formed. In 1989, Project Transitions, Inc. (PT) opened up their hospice facility (not yet named Doug's House.) In 1995, PT became a supportive housing owner and provider with the purchase of Roosevelt Gardens and then added 8 more units to their housing portfolio with the purchase of Highland Terrace in 1998. Through the years, PT has had an unwavering dedication to their mission of serving people with HIV and AIDS by providing supportive living, housing, recuperative care and hospice in compassionate and caring environments.

A recent impetus for PT to expand their housing footprint is a unified response to the **Getting To Zero (GTZ)** Strategy, a UNAIDS commitment to end the AIDS epidemic by achieving zero deaths, zero new infections, and zero discrimination and stigma by 2030. The City of Austin's commitment to the strategy was formalized by the Mayor's and County Judge's signing of the Paris Declaration to join the **Fast-Track Cities (FTC)** initiative on June 20, 2018. Housing is crucial to the Getting to Zero Strategy.

*****Most importantly, the Federal government has just launched "Ending the HIV Epidemic: A Plan for America" that will leverage powerful resources and tools now available to reduce new HIV infections in the United States by 75 percent in five years and by 90 percent by 2030. There are 48 US Counties targeted as hot spots that will receive the Federal focus – Travis County is one of those Counties.*****

Here is a link to the plan: <https://www.hiv.gov/federal-response/ending-the-hiv-epidemic/overview>
Here is the list of Counties: <https://files.hiv.gov/s3fs-public/Ending-the-HIV-Epidemic-Counties-and-Territories.pdf>

With the development of Roosevelt Gardens well-underway and the addition of the Burnet Place Apartments, Austin can make history as one of the first US cities to achieve Getting to Zero!

PT has retained Jennifer Hicks of True Casa Consulting to lead the finance and development of Burnet Place Apartments. Jennifer Hicks has over 20 years of affordable housing development and finance experience working for Foundation Communities - the State's premier nonprofit, affordable housing developer. As Director of Housing Finance, Hicks led the development of 14 innovative and high-impact communities that provided 1,559 units of affordable housing. While at Foundation Communities, Hicks also helped create and implement the first supportive housing model in Austin and grew the model to 783 units before her departure. In her current consulting capacity, Hicks has continued working with nonprofits to help structure and access capital for permanent supportive housing projects in Texas. Hicks' passion and expertise is centered around high-impact housing and enjoys the complexity and challenge these projects provide. She marries her development and finance skills with a deep



understanding of the target population that helps inform both the physical and programmatic design of the project that best suits the target population. Hicks has strong relationships with quality investors, lenders and local and state housing funders.

i.) Project Management:

Jennifer Hicks and PT are in the process of assembling a well-qualified and committed development team. First engaged was Big Red Dog – as civil engineer -to kick off the site due diligence. The team is currently reviewing RFP's for architect and general contractor. PT is grateful to have the husband and wife team behind Lakeway Hospitality, LP to act as Owner Representative for this project. Their combined experience of decades of real estate development will ensure a high-quality and high-performing building that will be delivered on time and within budget.

ii.) Market Analysis:

A market analysis is a routine part of the pre-development and feasibility of projects. Jennifer Hicks has coordinated an engagement of a market analyst for this project. Bob Coe with Affordable Housing Analysts is well-regarded in the affordable housing industry and is on TDHCA list of approved market analysts.

iii.) Site Selection and Control:

Jennifer Hicks has 20 years of site selection experience. Sites are selected based on a variety of factors including current funding priorities and appropriateness for the target population. Hicks works with private, third party brokers to locate sites. In the case of Burnet Place Apartments, this site was located by a third-party brokerage team working with the organization.

iv.) Planning and Construction:

Jennifer Hicks is leading the RFP process for engagement of a third-party general contractor who will be part of the project from the beginning. Based on Ms. Hicks' experience plus the connections provided by Lakeway Hospitality, LP, the project will receive RFP's from several high-quality contractors who have a solid track record of delivering projects on time and within budget. From experience, time and money is saved by having a high-quality general contractor engaged through the design process.

v.) Design, Architecture and Engineering:

Jennifer Hicks has engaged Big Red Dog as Civil Engineer for this project considering their vast expertise when it comes to urban projects on major transit corridors. The team is currenting reviewing RFP's for architect and a high-quality architect will soon be chosen for the project. A cohesive and experienced architecture and engineer team is critical to the overall project success. We are assuring the team assembled have worked with each other on other real estate development projects.

vi.) Legal and Accounting:



Legal services are being provided on as-needed basis when real estate documents necessitate review. PT does retain an attorney on the board who is able to review and comment on documents. All accounting is performed in-house by Madge Whistler, Interim ED and CFO. Audits are currently performed by Montemayor Britton Bender PC.

vii) Federal Funding Rules:

Jennifer Hicks has extensive experience working with programs funded by HUD and their associated federal regulations including: Federal Labor Standards, Davis Bacon Reporting, Section 3, Affirmative Marketing, Environmental Clearances, Public Notices and Procurement Standards. Please see attachment for a list of properties developed/assisted by Jennifer Hicks and the funding sources in place at each property. Also, please see Section 2 (Development Team) for more detailed information on Financing Experience.

viii) Other funding source rules (e.g. Low Income Housing Tax Credits):

Please see attachment for a list of properties developed/assisted by Jennifer Hicks and the funding sources in place at each property. Also, please see Section 2 (Development Team) for more detailed information on Financing Experience.



ATTACHMENT 1: APPLICANT ENTITY

d. Statement of Confidence:

N/A

Project Transitions has been locally involved in the provision of supportive services since 1989 and the ownership and management of affordable housing since 1995. All consultants and the professional team engaged are all local to Austin and have experience working on Austin-based, affordable housing and highly-complex, urban real estate projects.



ATTACHMENT 1: APPLICANT ENTITY

e. Financial Capacity:

PROJECT TRANSITIONS, INC. is not a newcomer to affordable housing development. They utilized funding from the City of Austin to purchase both of their existing housing communities.

Roosevelt Gardens was purchased in December 1994, with the closing taking place on December 31, 1994, and an effective date of January 1, 1995. The purchase price was \$480,000. Half of the funds -- \$240,000 -- came from the City of Austin Department of Neighborhood Housing and Community Development in the form of a ten-year forgivable loan. The source of those funds was a Community Development Block Grant from the U. S. Department of Housing and Urban Development. Project Transitions, Inc., put down \$50,000, which funds came from the organization's accumulated cash reserves, and the remaining \$190,000 came from a local bank as a commercial mortgage at a market rate.

Highland Terrace was purchased in 1998. The purchase price was \$198,000, and it was fully funded by a grant from the City of Austin HIV Resources Administration Unit. The source of those funds was a HOPWA (Housing Opportunities for People with AIDS) acquisition grant from the U. S. Department of Housing and Urban Development.

JENNIFER HICKS of True Casa Consulting – the lead consultant engaged by PT for the development of Burnet Place Apartments - has been engaged and working with City of Austin RHDA funds her entire career. Hicks also possesses extensive experience with the following housing programs:

- Low-Income Housing Tax Credit
- Texas Department of Housing and Community Affairs MFDL Program
- Federal Home Loan Bank AHP Program
- City of Austin, Neighborhood Housing and Community Development programs
- Section 811 PRA Program
- HUD Capital Financing programs, including HOME and CDBG
- HUD Continuum of Care
- Public Housing Authority programs, includes Housing Choice Vouchers

JENNIFER HICKS' portfolio of relevant experience includes:

Eastern Oaks Apartments – 30 units

Location:	Austin, Texas
Project Type:	major rehabilitation of existing public housing-owned property
Scope of Services:	Led financial structuring of capital stack including: TDHCA MFDL funding, City of Austin funding and FHLB AHP funding.



Garden Terrace – Phases I, II and III – 123 Units

Location: Austin, Texas

Project Type: acquisition/rehabilitation, supportive housing, adaptive re-use, single room occupancy, on-site supportive services

Scope of Services: Led pre-development, neighborhood support, financial structuring, FHLB AHP award, TDHCA HOME/HTF funding, City of Austin funding, construction budget review and value engineering, part of development team, contract review, Section 8 Moderate Rehabilitation Project-Based contract with Housing Authority of the City of Austin, TDHCA Multifamily Direct Loan program, environmental review, land and financial closings, design input for target population, voucher partnership with local nonprofit service organization, blended management with property management and supportive service teams, annual renewal of HAP contract, federal subsidy layering review.

Spring Terrace – 142 Units

Location: Austin, Texas

Project Type: acquisition/rehabilitation, supportive housing, single room occupancy, adaptive re-use, emergency shelter, Enterprise Green Communities, on-site supportive services

Scope of Services: Led pre-development, neighborhood support, financial structuring, FHLB AHP award, TDHCA HOME/HTF funding, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings, design input for target population, voucher partnership with local nonprofit service organization, blended management with property management and supportive service teams.

Skyline Terrace – 100 Units

Location: Austin, Texas

Project Type: acquisition/rehabilitation, supportive housing, single room occupancy, adaptive re-use, 9% HTC, Enterprise Green Communities, on-site supportive services

Scope of Services: pre-development, neighborhood support, financial structuring, 9% Low Income Housing Tax Credit application and award, FHLB AHP award, City of Austin funding, construction budget review and value engineering, part of development team, contract review, investor and lender RFP and selection, environmental review, land and financial closings, design input for target population, voucher partnership with local nonprofit service organization, blended management with property management and supportive service teams.



Arbor Terrace – 120 Units

Location: Austin, Texas

Project Type: acquisition/rehabilitation, supportive housing, single room occupancy, adaptive re-use, Enterprise Green Communities, on-site supportive services

Scope of Services: pre-development, neighborhood support, financial structuring, FHLB AHP award, Neighborhood Stabilization Program funding, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings, design input for target population, voucher partnership with local nonprofit service organization, blended management with property management and supportive service teams.

M Station – 150 Units

Location: Austin, Texas

Project Type: new construction, 9% HTC, family, mixed-income, mixed-use, Transit Oriented Development, LEED, on-site children's learning center and adult-focused services, integrated units for homeless and at-risk families

Scope of Services: pre-development, neighborhood support, financial structuring FHLB AHP award, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings, tenant for commercial space.

Sierra Vista – 238 Units

Location: Austin, Texas

Project Type: acquisition/rehabilitation, re-location, 9% HTC, family, Enterprise Green Communities, TDHCA Weatherization Assistance Program, on-site children's learning center and adult-focused services, integrated units for homeless and at-risk families

Scope of Services: pre-development, neighborhood support, financial structuring, FHLB AHP award, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, layered TDHCA WAP funding for green improvements, partnerships with state agency and nonprofit service organization for vouchered units, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings.

Capital Studios – 135 Units



Location: Austin, Texas
Project Type: new construction, zero lot line construction, Central Business District, 9% HTC, family, LEED, supportive housing, single room occupancy, commercial space and parking, on-site supportive services.
Scope of Services: pre-development, neighborhood support, financial structuring, FHLB AHP award, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, partnership with housing authority for VASH referrals, design input for targeted population, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings

Homestead Oaks – 140 Units

Location: Austin, Texas
Project Type: new construction, high opportunity area, 9% HTC, family, LEED, on-site children's learning center and adult-focused services, mixed income, integrated units for homeless and at-risk families
Scope of Services: pre-development, neighborhood support, financial structuring, FHLB AHP award, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, HUD 221 (d)(4) financing, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings.

Lakeline Station – 128 Units

Location: Austin, Texas
Project Type: new construction, high opportunity area, 9% HTC, family, LEED, on-site children's learning center and adult-focused services, integrated units for homeless and at-risk families
Scope of Services: pre-development, financial structuring, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, City of Austin funding, construction budget review and value engineering, part of development team, contract review, environmental review, land and financial closings

Bluebonnet Studios – 108 Units

Location: Austin, Texas
Project Type: new construction, zero lot line construction, 9% HTC, family, LEED, supportive housing, single room occupancy, on-site supportive services
Scope of Services: pre-development, neighborhood support, financial structuring, FHLB AHP award, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, partnership with housing



authority for VASH referrals, design input for targeted population, City of Austin funding, construction budget review and value engineering, part of development team, contract review, TDHCA Multifamily Direct Loan Program, environmental review, land and financial closings

Live Oak Trails – 58 Units

Location: Austin, Texas

Project Type: new construction, high opportunity area, 9% HTC, family, LEED, on-site children's learning center and adult-focused services, integrated units for homeless and at-risk families

Scope of Services: pre-development, neighborhood support, financial structuring, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, City of Austin funding, construction budget review and value engineering, part of development team, contract review, TDHCA Multifamily Direct Loan Program, environmental review, land and financial closings

Cardinal Point – 120 Units

Location: Austin, Texas

Project Type: new construction, high opportunity area, 9% HTC, family, LEED, on-site children's learning center and adult-focused services, integrated units for homeless and at-risk families.

Scope of Services: pre-development, neighborhood support, financial structuring, FHLB AHP award, 9% Low Income Housing Tax Credit application and award, investor and lender RFP and selection, City of Austin funding, construction budget review and value engineering, part of development team, contract review, PUD zoning with Master Community Association and design approval process, environmental review, land and financial closings

Non-Profit Attachments:

- 1) Federal IRS Certification
- 2) Certified Audit
- 3) Board Resolution approving Funding Application



IRS Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248205661
Oct. 09, 2015 LTR 4168C 0
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00015521
BODC: TE

PROJECT TRANSITIONS INC
% PROJ
7101 B WOODROW
AUSTIN TX 78757



025164

Employer Identification Number: 74-2502171
Person to Contact: Ms. Johnson
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Sep. 30, 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 September 1988.

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)(vi).

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.

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

200-0145
DEPARTMENT OF THE TREASURY

Date **APR 07 1993**

PROJECT TRANSITIONS INC
2525 WALLINGWOOD NO 705-N
AUSTIN, TX 78746

Employer Identification Number:
74-2502171

Contact Person:
SHARI FLOWERS

Contact Telephone Number:
(214) 767-3526

Our Letter Dated:
September 15, 1988

Addendum Applies:
No

Dear Applicant:

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

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

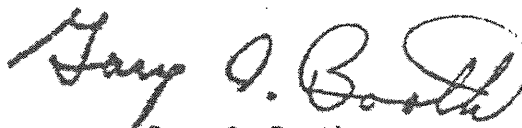
Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

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

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

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

Sincerely yours,



Gary O. Booth
District Director

RESOLUTION
BOARD OF DIRECTORS OF
Project Transitions, Inc.
Burnet Place Apartments


WHEREAS, **Project Transitions, Inc.**, a non-profit organization, is applying for funding from the Austin Housing Finance Corporation in Rental Housing Development Assistance Funding for the following project:

Rental Housing Development Assistance Funding for a proposed affordable housing, rental community located at 8007 Burnet Road, Austin, TX 78757. The funding will be used for acquisition, pre-development and/or construction costs.

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

Adopted and approved by the Board of Directors on the 24th day of April, 2019.

PROJECT TRANSITIONS, INC.

DocuSigned by:

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Craig Davis, President
Board of Directors of Project Transitions, Inc.



ATTACHMENT 2: DEVELOPMENT TEAM

Project Transitions has engaged the following high-quality development team to oversee the development of Burnet Place Apartments:

- | | |
|---|--|
| 1) Development and Financing Consultant: | Jennifer Hicks with True Casa Consulting, LLC |
| 2) Architect: | TBD – reviewing proposals of high-quality architects
(architect to be selected in May and will update app ASAP) |
| 3) Civil Engineer: | Big Red Dog, a division of WGI |
| 4) General Contractor: | TBD – reviewing proposals of high-quality GC's
(GC to be selected in May and will update app ASAP) |
| 5) Owner Representative: | Lakeway Hospitality, LP – Vijay and Dina Patel |

Please see attached documentation of experience for team members listed above. Each team member has vast experience in real estate development in Austin with the combined team having an impressive portfolio of affordable housing development and financing.



	Name and Contact Information	MBE?	WBE?	NP?
Owner	Madge Whistler, Interim Executive Director, Project Transitions, Inc. – 7101 Woodrow Avenue, Austin, TX 78757 (512) 454-8646 finance@projecttransitions.org			X
Development and Finance Consultant	Jennifer Hicks, Owner of True Casa Consulting, 3000 Skylark Drive, Austin, TX 78757 (512) 203-4417 jennifer@truecasa.net		X	
Architect	TBD – Reviewing RFP’s – to be decided by May 2019			
Engineer	Big Red Dog, a division of WGI 2021 E. 5th Street, Suite 200, Austin, TX 78702 (512) 669-5560 Jill.Tarleton@wginc.com			
General Contractor	TBD – Reviewing RFP’s – to be decided by May 2019			
Owner Representative	Lakeway Hospitality, LP Dina and Vijay Patel, 6403 US 290, Austin, TX 78735 dinavpatel@yahoo.com			
Property Management Provider	Madge Whistler, Interim Executive Director, Project Transitions, Inc. – 7101 Woodrow Avenue, Austin, TX 78757 (512) 454-8646 finance@projecttransitions.org			x
Other: Supportive Services Providers	Madge Whistler, Interim Executive Director, Project Transitions, Inc. – 7101 Woodrow Avenue, Austin, TX 78757 (512) 454-8646 finance@projecttransitions.org			x

TRUE CASA CONSULTING, LLC

Bio for Jennifer Hicks, Founder:

Jennifer Hicks has over 20 years of affordable housing development and finance experience working for Foundation Communities - the State's premier nonprofit, affordable housing developer. As Director of Housing Finance, Hicks led the development of 14 innovative and high-impact communities that provided 1,559 units of affordable housing. While at Foundation Communities, Hicks also helped create and implement the first supportive housing model in Austin and grew the model to 783 units before her departure. In her current consulting capacity, Hicks has continued working with nonprofits to help structure and access capital for permanent supportive housing projects in Texas. Hicks' passion and expertise is centered around high-impact housing and enjoys the complexity and challenge these projects provide. She marries her development and finance skills with a deep understanding of the target population that helps inform both the physical and programmatic design of the project that best suits the target population. Hicks has strong relationships with quality investors, lenders and local and state housing funders. Hicks was honored to be a part of Affordable Housing Finance's first round of 40 and Under Young Leaders, but her greatest reward is creating places for people to call home.

Affordable Housing Development Experience

True Casa has the following experience in Affordable Housing Development:

- 1) Leading affordable housing site selection for new communities including analyzing sites for scoring and threshold requirements with Housing Tax Credit program.
- 2) Structuring purchase contracts to meet requirements of Housing Tax Credit program.
- 3) Reviewing purchase contracts and ensuring milestones are all achieved.
- 4) Coordinating professionals to conduct third party due diligence reports and reviewing all reports (i.e. Phase I ESA, appraisals, market studies, property condition assessments, civil engineering reports, and surveys.)
- 5) Managing the required follow-up for any third party due diligence reports (i.e. Phase II ESA work.)
- 6) Coordinating RFQ's for architect and general contractor selection, including participating in selection committee.
- 7) Overseeing the financial structuring and development of 1,800 units of affordable housing.
- 8) Running project budgets and proformas for proposed affordable housing developments.
- 9) Managing the construction budget process including reviewing bids and participating in value engineering.
- 10) Leading the contract review and finalization for general contractor and architect and ensuring all federal requirements are properly referenced and adhered to, as well.
- 11) Participating in design review and input to ensure housing is designed with target population in mind.
- 12) Creating the organizational structure for new affordable housing developments including name registration and new entity creation with the Texas Secretary of State.

TRUE CASA CONSULTING, LLC

- 13) Ensuring that design and construction team is made aware of State and Federal housing construction requirements and that they are properly adhered to.
- 14) Overseeing compliance with Davis Bacon wage reporting and Federal labor standard laws.
- 15) Coordinating with development team on zoning and permit issues and timing, as needed.
- 16) Engaging with neighborhoods and community organizations on affordable housing education and specific development support.
- 17) Raising over \$218 million in grants and loans from public and private sources for the acquisition, rehabilitation and new construction of affordable housing.
- 18) Winning 9% low income housing tax credits in Texas on 11 developments in the past 10 years.
- 19) Preparing and processing 9% HTC applications including leading response to all deficiencies, underwriting and ensuring project meets all required reporting milestones.
- 20) Completing all reporting due to TDHCA on all HTC-funded projects – commitment, Carryover Allocation Agreement, 10% Test, construction monitoring reports, LURA origination, and Cost Certification.
- 21) Creating RFP for equity investors and lenders on affordable housing developments and analyzing responses for a final selection recommendation.
- 22) Negotiating the final LOIs from investors and lenders, as well as reviewing and negotiating the limited partnership agreement for tax credit projects.
- 23) Securing over \$10M in grant awards from the Federal Home Loan Bank Affordable Housing Program in 12 awards – application, underwriting, subsidy draw and initial compliance monitoring.
- 24) Securing gap funding from a variety of funding sources including: City of Austin Rental Housing Development Assistance Program, TDHCA Multifamily Direct Loan Program and Capital Magnet Fund.
- 25) Ensuring construction stays on timeline and meets any funder required deadlines (i.e. HTC PIS deadline.)
- 26) Leading the construction draw requests to construction lender and equity provider.
- 27) Ensuring all tax credit equity is drawn according to agreed upon milestones.
- 28) Coordinating with property management on lease-ups for HTC projects.
- 29) Structuring housing vouchers in new developments.
- 30) Designing supportive housing models based on site and project parameters.
- 31) Tracking project stabilization and leading the conversion to permanent mortgage.
- 32) Facilitating the refinancing of six different communities and preserving affordability.
- 33) Coordinating the Year 15 response on HTC financed communities.
- 34) Leading the closing on land acquisition and all project financing including coordinating the closing team and responding to due diligence calls from lender and investor.
- 35) Creating a compliance checklist that details all funder requirements for ongoing operations.

TRUE CASA CONSULTING, LLC

Project	New or Rehab	# of Units	Project Type	Financing	Year Complete	Income Mix
Arbor Terrace, Austin, TX	Rehab	120	Supportive Housing	Neighborhood Stabilization Program via TDHCA, City of Austin RHDA Program, FHLB Atlanta, NeighborWorks America	2012	90 units – 30% MFI 30 units – 50% MFI
Bluebonnet Studios, Austin, TX	New	107	Supportive Housing	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, TCAP, Enterprise Green Communities, NeighborWorks America, Private Fundraising	2016	22 units – 30% MFI 21 units – 40% MFI 64 units – 50% MFI
Capital Studios, Austin, TX	New	135	Supportive Housing	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Enterprise Green Communities, NeighborWorks America, Private Fundraising	2014	27 units – 30% MFI 27 units – 40% MFI 81 units – 50% MFI
Cardinal Point, Austin, TX	New	120	Family	9% LIHTC, City of Austin RHDA Program, FHLB AHP, Private Fundraising	2017	12 units – 30% MFI 60 units – 50% MFI 48 units – 60% MFI
Eastern Oaks Apartments, Austin, TX	Rehab	30	Family	TDHCA MFDL and RHDA Program	Under Development	All units below 30% MFI
Garden Terrace, Austin, TX	Rehab/New	123	Supportive Housing	City of Austin RHDA funding, FHLB AHP, TDHCA	2003, 2008, 2017	45 units – 30% MFI 75 units – 50% MFI

TRUE CASA CONSULTING, LLC

				HOME, Section 8 Moderate Rehabilitation SRO Program		3 units - UR
Homestead Oaks, Austin, TX	New	140	Family	9% LIHTC, City of Austin RHDA Program, HUD 221(d)(4) loan, FHLB AHP, NeighborWorks America, Private Fundraising	2015	14 units – 30% MFI 70 units – 50% MFI 42 units – 60% MFI 14 units - MKT
The Jordan at Mueller, Austin, TX	New	132	Family	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Private Fundraising	Under Construction	14 units – 30% MFI 66 units – 50% MFI 52 units – 60% MFI
Lakeline Station, Austin, TX	New	128	Family	9% LIHTC, City of Austin RHDA Program, Department of Justice Funds, Private Fundraising	2017	13 units – 30% MFI 64 units – 50% MFI 51 units – 60% MFI
Live Oak Trails, Austin, TX	New	58	Family Supportive Housing	9% LIHTC, City of Austin RHDA Program, Department of Justice Funds, Private Fundraising	2017	12 units – 30% MFI 12 units – 40% MFI 34 units – 50% MFI
M Station, Austin, TX	New	150	Family	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Enterprise Green Communities, NeighborWorks America, Private Fundraising, Permanent Mortgage with Impact Capital via Bank	2011	15 units – 30% MFI 75 units – 50% MFI 45 units – 60% MFI 15 units – MKT

Vijay K Patel
President & CEO of Lakeway Hospitality, LP

As the founder of Lakeway Hospitality, LP in 2003, Vijay Patel has successfully acquired, developed and managed several hotel properties in Austin and South Texas markets. These hotels consist of Hilton and Choice Hotel branded properties. It all started with the first hotel in 2003 in Eagle Pass, TX. A few years later a few more hotels were purchased on South Padre Island, TX. Soon after, Vijay was able to convince Hilton to allow him to develop new hotels. Since then three new hotels were developed with Hilton and a fourth is under way. These hotels were developed in down markets and in very high-barriers to build markets. The last 10 years, Vijay Patel has grown his company without much outside investment. All has been accomplished with internal cash flow. The next 10 years are looking very favorable for growth, as Lakeway Hospitality is poised to develop and acquire additional hotels.

Prior to being President of Lakeway Hospitality, LP, Vijay Patel worked for a Fortune 100 company for 13 years. There he started on the ground floor and moved up to being a Director. His skill sets are diverse. He worked in Finance, Engineering and Construction, Technical Sales, and Sales Management. He was highly regarded and consistently delivered better than expected results in his roles. He delivered one of the largest contracts in his company's history.

Vijay Patel is a first generation Indian American. He came to the US as a 5-year old child. He worked with his parents in a small motel in Dallas while going to school. After graduating from high school, he attended The University of Texas in Austin, TX. He was the first in his family to attend a college. He completed his BA in Economics, and then started working for MCI in Richardson, TX. While working, he went on to complete his MBA at The University of Texas, Dallas.

Today, he lives in Austin, TX and enjoys time with his wife and two children, while continuing to strategically grow his enterprise. With his humble beginnings, he is now looking to give back to his community. He is well connected with the Indian American Community and sits on many community boards and professional boards. His peers respect his work and his abilities to perform. He has many high-level allies in AAHOA, LPS, AHLA, G6 AND HILTON. Much has been accomplished in his short career and he is excited to see what the future is going to bring for his organization.



ATTACHMENT 3: PROPERTY MANAGEMENT TEAM

Project Transitions, Inc. is the current owner, property manager and primary supportive service provider for their three properties: Doug's House, Highland Terrace and Roosevelt Gardens. Project Transitions, Inc. (PT) will be the property manager for Burnet Place Apartments after construction.

PT performs all leasing, maintenance, accounting, compliance and other property management functions for their three properties. The success of PT's housing program is cemented in the absolute dedication and understanding of the organization's target population and their unique needs. PT's housing program yields extremely high client success rates due to intensive wrap-around services and a precise focus on client needs in the design, operation and maintenance of their properties.

Burnet Place Apartments will be served with a property manager and maintenance; at least three full-time social workers and 24-hour front desk coverage will be added to the supportive service staff to best serve the residents.

PT has deep familiarity with federal housing programs and associated compliance and accounting requirements. PT is a sub-recipient of the following programs administered by the Austin Public Health Department:

- Ryan White Part A (US Dept of Health and Human Services, Health Resources and Services Admin, and the HIV/AIDS Bureau)
- City of Austin General Funds
- Housing Opportunities for Persons with AIDS (HOPWA) (US Dept of Housing and Urban Development)

Please find attached the 2016 and 2017 compliance audits performed by the City of Austin on PT's Housing Programs which you find meet or exceed standards.

Please also find the resumes for Project Transitions' property management team:

- Blythe Plunkett – Volunteer and Facilities Manager
- Todd Logan – Director of Client Services

All PT properties are located inside the territorial boundaries of the City of Austin.

BLYTHE PLUNKETT

1208 MEADOWS DR. ROUND ROCK, TX 78681
512-217-6238 BLYTHEPLUNKETT@AOL.COM

EDUCATION / AWARDS:

- UTSA – Studied Criminology 1996-97
- Boston University PMP (Project Management) Certification 2009
- SOAR Certification ((SSI/SSDI Outreach, Access, Recovery)2010
- Mental Health First Aid 2013
- Motivational Interviewing 2015
- 2011 recipient of International Women's Day Service Award for work with the homeless
- 2011 recipient of New Philanthropist Award from GivingCity Austin for philanthropy work with the homeless
- 2011 Non-Profit of the Year from Young Non-Profit Professionals Network
- 2012 Austin American Statesman Volunteer of the Year in Social Services

PROFESSIONAL EXPERIENCE

PROJECT TRANSITIONS

Volunteer and Facilities Manager

10/15 - Current

- Recruit volunteers
- Conduct orientations and training
- Collect rent
- Manage preventive maintenance and upkeep of our properties

MOBILE LOAVES AND FISHES

Volunteer Coordinator / Community First! Administrative Assistant

5/11 – 12/13

- Manage approximately 1200 monthly volunteers + one-time volunteers
- Train new volunteers
- Implement new teams / initiatives
- Property Management of our Community First! Program
- Provide case management to residents

Community First! Coordinator

1/14 – 10/15

- Property management for our Community First! housing program
- Determine eligibility and process applications for housing / maintain waiting list
- Provide case management to residents
- Identify unmet needs of clients and pair them with help
- Form relationships with other agencies serving the same population to provide wrap-around services

ROUND ROCK MACHINE AND MANUFACTURING

Office Manager – work on contractual, part-time basis

1992 - 2011

- Bookkeeping / Payroll
- Filing, copying, draft correspondence, schedule meetings, company functions
- Purchase office supplies

FISHER HAGOOD, INC - Civil and Structural Engineers

Project Assistant –

2007

- Research agency requirements for land development and coordinate permitting
- Act as company representative at City Council / Planning and Zoning meetings
- Client's liaison between designers and regulatory agencies
- Gather feasibility study information, close out projects and respond to RFI's

PALM HARBOR HOMES

Operations / Construction Manager –

2003 – 2006

- Develop cost effective plan and schedule for completing project on time and within monies allocated
- Review/analysis of finance options, bank draws, loan coordination, insurance signings and conduct loan closings
- Budget allocation, job-costing, AP/AR, month end reporting, charge-backs
- Subcontractor selection, scheduling, site evaluation/feasibility study, bidding, material purchasing, oversee subcontractors to ensure code compliance
- Administer customer service program, arbitrate warranty issues
- Responsible for obtaining permits and proper contract administration
- Monthly salesperson reviews and benefits administration

Office / Customer Service Manager – 2003 - 2004

- Manage AP/AR, job-costing, maintain GL, month-end reporting, accruals
- Payroll and benefits administration
- Administer customer service program
- Complete new-hire packages and new employee training

Key Contributions:

- Brought our store to #1 nationwide in customer service
- Awarded the 2003 Associate of the Year
- 2005 Cost Savings Award winner

CLINICAL PATHOLOGY LABORATORIES

Assistant Purchasing Manager –

1999-2002

- Manage purchasing for 60 locations nationwide with a \$1.2 million/month budget
- Negotiate contract pricing, cost forecasting, budget allocation
- New product research and implementation
- Develop, prepare and monitor statistical reports
- Design forms & procedures for time/cost efficiency
- Maintain warranty contracts on machinery

MISC. RELEVANT EXPERIENCE

CommUnity CARE: Board Member

9/17 - CURRENT

COMMUNITY ACTION NETWORK: Membership Council

12/14 - 9/2017

HOMELESS OUTREACH

6/01 – CURRENT

I began working with Austin's homeless population on my own in 2001. I've advocated on their behalf to find housing, benefits, social services, treatment, reconnect with family, etc. I have built a wonderful network of providers in the area.

HOUSE THE HOMELESS: Board Member

11/13 - CURRENT

ECHO

Education & Outreach Workgroup Chair/Membership Council
Point In Time Count Team Leader

1/14 – CURRENT
2007 –CURRENT

COMMUNITY HEALTH CHAMPION

2016

AUSTIN POVERTY INITIATIVE

Coalition tackling issues that adversely affect our community.

1/14 – 1/15

DOWNTOWN AUSTIN COMMUNITY COURT ADVISORY SUBCOMMITTEE

3/13 – 8/13

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

awarhol@austin.rr.com (512) 565-2916

EDUCATION

UNIVERSITY OF TEXAS, AUSTIN
UNIVERSITY OF SOUTH FLORIDA

Masters, Social Work, 1993
Bachelors, Sociology, 1983

KNOWLEDGE AND SKILLS

- Program Coordination
 - Project Management
 - Workgroup and Meeting Facilitation
 - Supervision, Leadership
 - Performance Monitoring and Evaluation
 - Track Program Performance with Data
 - Training, Case Management
 - Categorical Eligibility Programs
 - Grants Management
 - Contracting
 - Disparate/Affected Populations
 - Community/Stakeholder Relations
- Knowledge of:
- Substance Abuse and Mental Health
 - Corrections
 - Brief Therapy, CB Therapy, MI

EXPERIENCE

Director of Client Services, April 2016 to present

PROJECT TRANSITIONS, INC.

Act as second-line supervisor for 2 programs: a 5-bed special care facility and housing program with 30 apartments. Provide vision, set program goals, collect and analyze data to track program performance, provide all public grants reporting, interface with funder, facilitate weekly program meetings and supervise front-line program coordinators. Redesigned internal systems to bring in line with the current environment.

Special Projects Coordinator, January 2015 to March 2016

TEXAS DEPT OF STATE HEALTH SERVICES

Program project manager. Engage in system transformation, implementing a new medical intervention statewide (PrEP) and oversee planning for statewide conference of 1000 participants; assist in goal setting, design strategies, organize activities, track progress, determine next steps and oversee workgroups including setting agendas and facilitating meetings. One project involved 7 workgroups: community engagement/awareness, provider recruitment, work force training and ensuring equitable access for uninsured persons.

Service Integration Coordinator, October 2010 to December 2014

TEXAS DEPT OF STATE HEALTH SERVICES

Program coordinator responsible for 4 year federal grant: identify funding, write successful application, oversee budget of \$350,000 annually. Set vision for 4 strategies, track deliverables, interface with funder, complete reporting, develop request for proposals, write contracts and monitor contractor performance. Facilitate workgroups without managerial authority, learn new subject areas and persuade stakeholders outside normal scope. Integrate health screenings at 6 substance use treatment centers to address access disparities; provide TA, address systems issues, design data collection and conduct evaluation. Work with laboratories, providers, CBOs.

Special Projects Coordinator, January 2006 to September 2010

TEXAS DEPT OF STATE HEALTH SERVICES

Perform project management on 5-6 projects for all areas of operation. Research issues, assemble workgroups, facilitate meetings, assign duties, monitor progress. Act as policy lead; handle legislative, upper management and funder information requests. Projects: revision of case management standards; community engagement/media campaign for special population; web-based prevention; point of care testing procurement, distribution and standards; data security; planning/change management to integrate new procedures at 64 clinics statewide.

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

awarhol@austin.rr.com (512) 565-2916

EXPERIENCE (CONTINUED)

Training Specialist IV, November 1999 to December 2005

TEXAS DEPT OF STATE HEALTH SERVICES

Provide classroom instruction, skill building, on-site session observation and feedback to new staff on risk assessment and behavior change counseling. Act as point person for new system of 18 different group and community-level evidenced-based interventions implemented across 30 agencies. Provide technical assistance, on-site session observation and feedback, consult with original researchers and act on over 40 requests to tailor programs. Develop statewide technical assistance bulletins. Additionally, provide instruction and technical assistance on measuring client behavior change following engagement in these psycho-educational interventions; assist all contractors in setting goals and pre/post measures.

Educational Services Specialist, January 1992 to October 1999

TEXAS DEPT OF HUMAN SERVICES

Provide classroom instruction and on-the-job training to new employees determining eligibility for Food Stamps, Temporary Assistance to Needy Families and Medicaid. As management trainer, provide instruction on civil rights, sexual harassment, supervisory skills and the personnel process. Act as mediator to resolve conflicts in supervisory relationships, mentor supervisors, negotiate performance improvement plans. Act as 2nd level supervisor of training operations with 60 employees for 8-months. Conduct teambuilding for low-performing work groups; Create and facilitate town meetings.

Social Service Supervisor, November 1989 to December 1991

TEXAS DEPT OF HUMAN SERVICES

Supervise 22 staff performing 10 different functions at over-burdened facility serving 10,000 clients. Manage all points of access: scheduling for 20 caseworkers totaling 400 appointments weekly, sign-off on \$500,000 benefit issuance yearly, oversee weekly problem resolution traffic of 350 clients through front desk and 1000 phone calls; handle all client complaints, automate older systems, plan and implement quality assurance measures. Evaluate employee performance, write employee evaluations, hold counseling conferences, set corrective action plans, and implement the personnel process.

Eligibility Worker III, November 1988 to October 1989

TEXAS DEPT OF HUMAN SERVICES

Supervise 5 staff; manage small Medicaid office out-stationed within large public hospital.

Social Service Supervisor, November 1986 to June 1987

FLORIDA DEPT OF HEALTH

Plan and implement new Medicaid unit across 5 public health clinic and hospital locations. Determine sites, build relationships with providers, negotiate logistics, and create systems. Supervise 11 staff; evaluate employee and site performance, manage operations.

OTHER EXPERIENCE

Adolescent and Family Counselor

YOUTH OPTIONS (LIFEWORKS)

Counsel low-income, at-risk youth and their families in crisis; establish rapport, identify issues, facilitate goal setting, problem-solve, utilize family resources, support strengths, write treatment plans and track progress. Conduct adolescent and separate adult parenting group.

Therapist

WATERLOO COUNSELING CENTER,

Engage in long-term therapy with newly diagnosed HIV-positive individuals. Work on issues of depression, fear, shame, anxiety. Conduct couples counseling, assist facilitation of a men's group.

Group Facilitator

OUTYOUTH, AUSTIN

Facilitate weekly peer support groups; one for high school guys and another for men 18-21 years.



HIV Resources Administration Unit, Health Equity and Community Engagement Division
7201 Levander Loop, Bldg. H, Austin TX 78702 - main phone 512-972-5083

January 22, 2018

Madge Whistler
Interim Executive Director & Financial Administrator
Project Transitions
7101 Woodrow Ave
Austin, TX 78757

(also transmitted via Email)

Re: Review of Project Transitions, a Ryan White HIV/AIDS sub-recipient

BACKGROUND

Project Transitions was a sub-recipient of the following programs:

- Ryan White Part A (March 1st, 2017-February 28th, 2018)
- City of Austin General Funds (October 1st, 2016-September 30th, 2017)
- Housing of People with AIDS (HOPWA) (October 1st, 2016-September 30th, 2017)

The U.S. Department of Health and Human Services, Health Resources and Services Administration (HRSA), and the HIV/AIDS Bureau (HAB) administer Ryan White Program funds. Grant funding is made available through federal funding directly to the City of Austin. Ryan White funding is provided on a cost-reimbursement basis. Austin Public Health's HIV Resource Administration Unit is the Administrative Agency (AA) appointed to administer grant funds by contracting with health care and non-profit agencies to provide services to affected individuals in the Greater Austin service delivery area.

The Ryan White HIV/AIDS Program is a federal grant program that provides HIV/AIDS related health services. The program works with cities, states, and local community-based, non-profit organizations to provide services to more than half a million people each year. The City of Austin is the Recipient of such grants, and Project Transitions is a sub-recipient service provider of Ryan White Program services.

The Ryan White Program is for those who do not have sufficient health care coverage or financial resources for coping with the HIV disease. Ryan White is the payor of last resort. It fills gaps in care not covered by other sources such as Medicare, Medicaid, or any major health insurance carrier, for those who have met the eligibility requirements. The majority of Ryan White HIV/AIDS Program funds support primary medical care and essential support services.



As part of HRSA's "Maintenance of Effort," the City of Austin allocates money from the General Fund to support sub-recipients. Project Transitions is funded for Housing Services through City of Austin general funds.

The HOPWA Program is the only Federal program dedicated to the housing needs of people living with HIV/AIDS. Under the HOPWA Program, HUD makes grants to local communities, States, and nonprofit organizations for projects that benefit low-income persons living with HIV/AIDS and their families.

Each funding source consists of multiple parts with each part having its own budget and objectives. APH HRAU contracted with Project Transitions for the following:

	Funding Source		
	RWPA	City GF	HOPWA
Project Transitions			
Housing Services	X	X	
Supportive Housing Services			X
Facility Based Transitional Housing			X
Tenant Based Rental Assistance			X

COLLABORATIVE RESEARCH MONITORING ROLE

Collaborative Research acts as an independent auditor to ensure the objectives of the program funds are achieved by completing an annual review of the sub-recipient's operations and service delivery. This report details the review and concludes with recommendations (if necessary).

SCOPE

Two monitors reviewed 82 charts across four service categories. The monitoring visit was conducted over one day, November 17th, 2017. An entrance interview with key agency staff was conducted at the beginning of the monitoring site visit. An exit interview with key staff was conducted at the conclusion of the monitoring site visit.

MONITORING OBJECTIVES

Our objectives were to determine:

- If all contractual obligations were met
- Compliance with Federal, State, and Local laws applicable to grants
- Compliance with grantor's policies and procedures
- Program/Quality/Fiscal management controls are in place and operating in accordance with HRAU's Standards of Care for HIV/AIDS services
- Universal standards

- Access to care (HRSA Universal Standard)
- Anti-kickback statute
- Reporting requirements
- Record-keeping systems
- Client file review
- Grant funded personnel files
- AIDS Regional Information and Evaluation System (ARIES)
- Non-discrimination and other assurances

The following pages provide the results of the comprehensive site monitoring within a chart format, for each contracted service category reviewed.



Austin Public Health



P.O. Box 1088
Austin, Texas 78767

Thursday, January 26, 2017

Mr. Craig Thibodeau
Executive Director
Project Transitions
7101 Woodrow Ave
Austin, Texas 78757

Re: Review of Project Transitions a Ryan White HIV/AIDS and Housing Opportunities for People with AIDS (HOPWA) sub-recipient

BACKGROUND

Project Transitions is/was a sub-recipient of the following programs:

- Ryan White Part A (March 1st, 2016-February 28, 2017)
- Housing Opportunities for People with AIDS (HOPWA) (October 1, 2015-September 30th, 2016)
- City of Austin General Funds (October 1, 2015-September 30th, 2016)

The U.S. Department of Health and Human Services, Health Resources and Services Administration (HRSA), and the HIV/AIDS Bureau (HAB) administer Ryan White Program funds. The U.S. Department of Housing and Urban Development (HUD) administers HOPWA funds. Grant funding is made available through federal funding directly to the City of Austin. Ryan White funding is provided on a cost-reimbursement basis. Austin Public Health's HIV Resource Administration Unit is the Administrative Agency (AA) appointed to administer grant funds by contracting with health care and non-profit agencies to provide services to affected individuals in the Greater Austin service delivery area.

The Ryan White HIV/AIDS Program is a federal grant program that provides HIV/AIDS related health services. The program works with cities, states, and local community-based, non-profit organizations to provide services to more than half a million people each year. The City of Austin is the recipient of such grants, and Project Transitions is a sub-recipient service provider of Ryan White Program services.

The Ryan White Program is for those who do not have sufficient health care coverage or financial resources for coping with the HIV disease. Ryan White is the payor of last resort. It fills gaps in care not covered by other sources such as Medicare, Medicaid, or any major health insurance carrier, for those who have met the eligibility requirements. The majority of Ryan White HIV/AIDS Program funds support primary medical care and essential support services.



Austin Public Health



P.O. Box 1088
Austin, Texas 78767

The Housing Opportunities for Persons with AIDS (HOPWA) Program is the only Federal program dedicated to the housing needs of people living with HIV/AIDS. Under the HOPWA Program, HUD makes grants to local communities, States, and nonprofit organizations for projects that benefit low-income persons living with HIV/AIDS and their families.

Each funding source consists of multiple parts with each part having its own budget and objectives. Austin Public Health contracted with Project Transitions for the following:

	Funding Source		
	RWPA	City of Austin General Fund	HOPWA
Project Transitions			
Facility Based Transitional Housing; TBRA; Supportive Housing Services			X
Hospice Services	X	X	

COLLABORATIVE RESEARCH MONITORING ROLE

Collaborative Research acts as an independent monitor to ensure the objectives of the program funds are achieved by completing an annual review of the sub-recipient's operations and service delivery. This report details the review and concludes with recommendations.

SCOPE

One monitor reviewed 39 charts across multiple service categories. The monitoring visit was conducted over two days, December 6th and December 7th. An entrance interview with key agency staff was conducted at the beginning of the monitoring site visit. An exit interview with key staff was conducted at the conclusion of the monitoring site visit.

MONITORING OBJECTIVES

Our objectives were to determine:

- If all contractual obligations were met
- Compliance with Federal, State, and Local laws applicable to grants
- Compliance with grantor's policies and procedures
- Program/Quality management controls are in place and operating in accordance with HRAU's Standards of Care for HIV/AIDS services:
 - Universal standards
 - Access to care (HRSA Universal Standard)
 - Anti-kickback statute
 - Reporting requirements
 - Record-keeping systems



Austin Public Health



P.O. Box 1088
Austin, Texas 78767

- Client file review
- Grant funded personnel files
- AIDS Regional Information and Evaluation System (ARIES)
- Non-discrimination and other assurances

MONITORING RESULTS (*Monitor's note: Included with this summation report is the individual review of each chart by service category/funding source and universal standards monitoring spreadsheet).*

1. Programmatic (Universal Standards):
 - a. Good documentation and compliance with HRSA/HOPWA program monitoring standards
 - b. **CONCERN:** All clients must be screened for Third Party Payors to determine eligibility for Ryan White Part A services. Two Hospice clients were determined to have active Medicare which would make them ineligible for Ryan White Part A Hospice Services.
 - c. **RECOMMENDATION:** Ensure all HR files/grant funded positions are current with required trainings as outlined in HRSA/HOPWA monitoring standards (HIPAA, Cultural Competency, etc)
 - d. **RECOMMENDATION:** Ensure timely data entry into ARIES based on scheduled time from DSHS.
2. HOPWA
 - a. Good documentation and compliance with HOPWA standards
 - i. 30% of charts reviewed missing client signatures on rental assistance worksheet (101043057; 101043206; 101138048; 101055689; 100936665; 101115137 (also missing case notes); 101234060)
 - b. **RECOMMENDATION:** HOPWA charts need to be better organized. Ensure all clients review eligibility documentation and sign rental assistance worksheet
 - c. **RECOMMENDATION:** PT create a self-attestation document to report cash income for temporary work/day labor.
3. Hospice Services
 - a. Good documentation and compliance with HRSA/TGA Standards of Care for Hospice Services.
 - i. One chart, 100275098-COAGF, missing physician certification
 - b. **CONCERN:** All clients must be screened for Third Party Payors to determine eligibility for Ryan White Part A services. Two Hospice clients were determined to have active Medicare which would make them ineligible for Ryan White Part A Hospice Services.

A Management Response to this report is required. Management's responses and action plan regarding this report are provided in Attachment A. The Management Response must be sent to your contract



Austin Public Health



P.O. Box 1088
Austin, Texas 78767

manager within 30 days of this notice. Follow-up will then be conducted by your contract manager within 30, 60 and 90 days after Management Response is received. After 90 days, your contract manager will then communicate your monitoring level to you. I appreciate the assistance you and your staff provided to our monitors.

Sincerely,

A handwritten signature in blue ink that reads "Gregory L. Bolds". The signature is fluid and cursive, with the first name "Gregory" being the most prominent.

Gregory Bolds
HHS Manager
Austin Public Health
HIV Resources Administration Unit (HRAU)

cc: David Garza
cc: Don Hastings
cc: Laura LaFuentes



Austin Public Health



P.O. Box 1088
Austin, Texas 78767

ATTACHMENT A

Management Action Plan based on monitoring recommendations:

Recommendation	Concurrence and Proposed Strategy for Implementation	Status of Strategy	Proposed Implementation Date
CONCERN: All clients must be screened for Third Party Payors to determine eligibility for Ryan White Part A services.			
Ensure all HR files/grant funded positions are current with required trainings as outlined in HRSA/HOPWA monitoring standards (HIPAA, Cultural Competency, etc)			
Ensure timely data entry into ARIES based on scheduled time from DSHS.			
HOPWA charts need to be better organized. Ensure all clients review eligibility documentation and sign rental assistance worksheet			
PT create a self-attestation document to report cash income for temporary work/day labor			

UNIVERSAL STANDARDS TOOL

Service Provider: Project Transitions

1. Universal Standards

	YES	NO	N/A
1. Which scope of work does the project meet?			
Part A	1		
Part C		1	
HOPWA		1	
City of Austin General Funds	1		
MAI		1	

2. Code of Ethics

Agency has policy onsite regarding non-discriminatory provided services	1		
Agency has policy onsite regarding client/consumer/patient rights and confidentiality	1		
Agency has policy onsite regarding services provided without interference of conflicts of interest	1		
Agency has policy onsite regarding grievance procedures	1		
Agency has Code of Ethics policies onsite specific to each service category	1		

3. Verification of Eligibility

Agency has written policies onsite to ensure compliance with program requirements as communicated by the Grantee (recipient) and the Standards of Care	1		
Are client eligibility procedures established in writing?	1		
Agency has written policy regarding verification of eligibility to include the required documentation in the client files:			
o Standardized ARIES client eligibility	1		
o Review verification form and all supporting documentation	1		
o Standardized Payor of Last Resort Screening Tool	1		
o Documentation as listed in Standards of Care in each client file regarding proof of positivity, proof of residency, proof of income, ARIES consent/consent to share, client rights and responsibilities, client informed consent	1		
Agency has documented in ARIES:			
o Agency Consent Form - annual	1		
o ARIES Consent Form - annual	1		
o Release of Information - annual	1		
o Client Confidentiality Form - annual	1		
o Proof of Residency – every 6 months	1		
o HIV Letter of Diagnosis - once	1		
o Proof of Income – every 6 months	1		
o Picture ID - annually	1		
Agency has written policy onsite regarding documentation necessary for services rendered to affected Ryan White clients	1		
Agency has policy regarding payor of last resort	1		

Agency has policy/procedure indicating Veterans cannot be deemed ineligible for RW services even if they receive and are eligible for VA benefits (Access to Care:HRSA Universal Standard)	1		
Agency has policy onsite regarding eligibility verification assessed every 6 months per RW federal legislation	1		
4. Orientation/Training of Staff/Volunteers			
Agency maintains personnel files with documentation of completed orientation as stated in Standards of Care			1
Agency personnel files have signed job description			1
Agency has current policy and procedure manuals on file as appropriate for licensed staff			1
Agency personnel files of staff, volunteers, and/or subcontractors reflect eight (8) hours of training annually completed			1
5. Confidentiality of Client Information			
Agency has policy and procedure manual onsite with regards to HIPAA and safe keeping of client files; all client records belong to City of Austin.	1		
Personnel files have documentation of training in confidentiality of client information	1		
Provider maintains documentation in client file of informed consent, client rights and responsibilities, and ARIES consent to share. (Copy of forms must be present to show compliance)	1		
6. Consumer Rights and Responsibilities			
Client files reflect signed statement of consumer rights and responsibilities	1		
Client files reflect signed informed consent statement prior to receipt of services	1		
7. Collaborative HIV Service Delivery			
Agency has MOU agreements with service providers on file	1		
Documentation in Agency personnel files reflects training of staff on available resources	1		
Agency has policy regarding staff mileage reimbursement	1		
Service fee imputed in ARIES matches billing statements	1		
Agency has policy regarding no direct payment to client/patient	1		
8. Cultural Competency			
Agency has policy onsite regarding equitable/non-judgmental services provided	1		
Agency has policy onsite regarding cultural sensitivity with provision of services	1		
Personnel files reflect documentation of annual cultural competency training	1		
Provider maintains source list of interpretive services	1		
Personnel files reflect documentation of training for staff regarding cultural competency/language barriers	1		
9. Use of Volunteers			
Agency maintains list of volunteer support activities available onsite	1		
Personnel files reflect documentation of completed orientation and training signed by volunteer and supervising staff	1		
Personnel files reflect documentation of supervised sessions	1		
Agency has policy/protocol onsite to support volunteer recruitment, recognition, and retention	1		
10. Quality Management			

Agency has documentation of monitoring participation in planning projects as requested by recipient

Agency has policy with regards to provision of data as requested by recipient onsite

Agency has policy/procedure/protocol and documentation of self-monitoring for programmatic compliance quarterly (qtrly reports showing outcomes)

Agency has all current documentation onsite regarding:

o Certificate of Occupancy

o Appropriate licenses and inspection approvals of all physical plant issues

o Compliance with zoning, building, health and safety codes, lighting, heating and air conditioning, accessibility to handicapped persons

Agency has documentation of written client satisfaction plan with annual assessments of surveys

Agency maintains written grievance plan that addresses an annual assessment of consumer grievance procedures

Agency maintains satisfaction surveys onsite and show evidence of client participation

Agency has documentation of its Quality Management Plan

Agency documents self-audit for compliance with RW SOC semi-annually

Personnel files reflect staff training in QM as appropriate and written identification of SPOC on site LIST SPOC for agency in the comments section below.

1		
1		
1		
1		
1		
1		
1		
1		
1		
1		
1		

Comments:

Other:

2. Access To Care (HRSA Universal Standard)

Provider has policies and procedures that do not: (a) deny services for non-payment; (b) deny payment for inability to produce income documentation; (c) require full payment prior to service; (d) include any other procedure that denies services for non-payment.

Documentation of eligibility determination and provider policies to ensure that they do not: (a) permit denial of services due to pre-existing conditions; (b) permit denial of services due to nonHIV-related conditions (i.e., primary care); (c) provide any other barrier to care due to a person's past or present health condition.

Availability of informational material about provider's services and eligibility requirements, such as: newsletters; brochures; posters; community bulletins; and any other types of promotional materials

Agency will maintain a facility that is accessible. Agency will have policies and procedures that provide, by referral or vouchers, transportation if facility is not accessible to public transportation policies that may act as a barrier to care for low-income individuals.

YES	NO	N/A
1		
1		
1		
1		

Comments:

3. Anti-Kickback Statute

YES	NO	N/A
-----	----	-----

1. Documentation of Agency's Employee Code of Ethics, which includes: (a) conflict of interest; (b) prohibition or use of property, information or position without approval or to advance personal interest; (c) fair dealing – engaged in fair and open competition; (d) confidentiality; (e) protection and use of company assets; (f) compliance with laws, rules and regulations; (g) timely and truthful disclosure of significant accounting deficiencies; (h) timely and truthful disclosure of non-compliance.

1

2. Documentation required by the Compliance Plan or employee conduct standards that prohibit employees from receiving payments in kind or cash from suppliers and contractors of goods or services.

1

3. Comments:

4. Reporting Requirements

1. Were monthly or progress and/or performance reports submitted as specified in the contract?

YES

NO

N/A

1

2. Were Goal and Objective measures properly reported?

1

3. Comments:

5. Record-Keeping Systems

1. Are the service provider's files orderly, current, comprehensive, and secured for confidentiality where necessary?

YES

NO

N/A

1

2. Did the service provider's records support the actual reported number of client(s) served?

1

3. Could the service provider retrieve all sampled/requested files?

1

4. Were sampled/requested files complete and self-explanatory?

1

5. Does the service provider's project files/records have the necessary documentation supporting eligibility and program costs?

1

6. Does the service provider maintain a record of all documentation outlined in any contracts and/or agreements with the City?

1

7. Is there a specified number of years for record retention? 5 years after acceptance of audit by the City

1

8. Indicate how long records are retained in the Comment Section (see Question 9).

1

9. Comments: 7 Years

6. Client File Review

1. Were client application procedures established in writing?

YES

NO

N/A

1

2. Were client case file maintenance procedures established in writing (including client identification number system)?

1

3. Were program activity forms established to track the services provided?

1

4. Are drug dispensing fees and policies established in writing?

1

5. Did all sampled clients meet all eligibility requirements?

1

6. Did all sampled client files include:

a signed client intake application for services form

a signed consent to receive services form

Information about health care coverage?

a detailed assessment and service plan

a signed confidentiality statement

a signed statement of consumer rights and responsibilities

7. Did the service provider maintain a sign-in/attendance roster for all services/training provided under the contract?

8. Were all sampled clients validated via sign-in sheets or attendance rosters?

9. Did all sampled clients confirm receipt of services received?

10. Are client termination procedures established in writing?

11. Are appeal procedures established in writing?

12. Are appeal procedures made available to all clients?

13. Does agency have policy in place for refusing services to ineligible clients, to include reporting to the AA?

14. Were all sampled client files maintained in a reasonably standard format to facilitate the routine location of materials?

15. Does the service provider document on client records the primary language/dialect of a client who has limited English proficiency and the need for translation or interpretation services?

16. Does the service provider coordinate service delivery with City of Austin departments to avoid duplication of efforts?

17. Comments:

1		
1		
1		
1		
1		
1		
1		
		1
		1
1		
1		
1		
1		
1		
	1	
1		
1		

7. Personnel

1. Do timesheets for grant-funded personnel and volunteers:

Indicate they were prepared at least monthly and coincide with one or more pay periods?

Contain the signatures of the employee/volunteer and the supervisor of the employee/volunteer?

2. Do timesheets for positions partially funded by the grant clearly and accurately differentiate between time spent on approved grant activities and time spent on other activities?

3. Does the service provider maintain personnel records for both current and past grant personnel employed during the grant period?

4. Is the service provider using grant funding to supplant existing positions?

5. Are the staff informed about program requirements and project expectations?

6. Did the service provider provide job performance evaluations for all grant-paid staff?

7. Indicate how often job performance evaluations are completed in the Comment Section

8. Does each personnel file include:

YES	NO	N/A
1		
	1	
1		
1		
	1	
1		
1		

job description including minimum qualifications and credentials for the position (must include grant supported activities to be performed, including HOPWA)
evidence that employee meets the requirements specified in the job description (resume and/or application)
a signed confidentiality statement
evidence of all necessary trainings and certifications
9. Were all personnel files maintained in a reasonably standard format to facilitate the routine location of materials?

1		
1		
1		
1		
1		

10. Comments: Annual performance reviews.

8. ARIES

1. Administrative

Do the names of the designated ARIES Point of Contacts match the ARIES Point of Contact Form filed with the Data Analyst?

Is there an ARIES Certificate Request Form for each current ARIES user?

Is there an ARIES Certificate Deletion Form for each terminated ARIES user?

2. System Security

Are all ARIES computers located in a secure location, away from public view?

If no:

o Are there security screens for the monitors?

o Does the general public access these computers?

Are any ARIES computers shared?

o If yes, is there a different ARIES Certificate for each user?

Is ARIES being used on any laptops?

Do the computers have locking screensavers set for 10 minutes of inactivity?

3. Data Quality

Are service units entered into ARIES within 5 days of services rendered?

Are the Required documentation entered in ARIES and current?

o Proof of Positivity

o Proof of Residency

o Proof of Income

o ARIES Consent

o ARIES Consent to be Shared

Are the CDC Disease Stages being captured in ARIES?

Are the ART Medications being captures in ARIES?

Are the CD4 T-Cell Counts being captured in ARIES?

Are the Viral Loads being captured in ARIES?

YES	NO	N/A
1		
1		
		1
1		
		1
		1
	1	
		1
	1	
1		
		1
		1
		1
		1
		1
		1
		1
		1

4. Comments:

9. Non-Discrimination & Other Assurances

1. Is the service provider in compliance with Equal Employment Opportunity regulations?

YES	NO	N/A
1		

2. Is the service provider in compliance with Requirements for Disabled Persons?
3. Is the service provider in compliance with Women and Minority Business Enterprises requirements? if applicable
4. Does the service provider have a policy in place to notify the client's pharmacy when a client dies?
5. Does the service provider advocate or promote conduct that violates state law?
6. Does the service provider maintain collaborative efforts with local Tuberculosis (TB) Control programs?
7. Does the service provider provide a drug-free workplace?
8. Is the service provider in compliance with the non-discriminatory requirements of Texas Labor Code, Chapter 21?
9. Does the service provider charge a fee for profit?
10. Is the service provider in good standing with all state and/or federal departments or agencies that have a contracting relationship with the respondent
11. Is the service provider in good standing with the Internal Revenue Service on any debt owed

1		
	1	
1		
	1	
1		
1		
1		
1		
	1	

12. Comments:

10. Conclusion & Follow-Up

1. Is the service provider meeting the terms of the agreement?
2. Overall, is the service provider's data reliable based on the program eligibility requirements, accomplishments, and client files?
3. Have any follow-up measures to be taken by the service provider been identified?
If so, has a schedule for implementing corrective actions or making improvements been provided?
4. Have any follow-up measures to be taken by the City been identified?
If so, has a schedule for any needed technical assistance or training been provided?
Has the person or site been identified to provide the training if required?

YES	NO	N/A
1		
1		
	1	
		1
1		
	1	
	1	

5. Comments:

City of Austin, Texas					
HOPWA Services					
Service Provider: Project Transitions		Review Date: 12/7/2016			
Reviewer: Jeff Daniel		101194066			
CLIENT FILES		Y	N	N/A	COMMENTS
1. Client File contains Checklist	1				
2. Client Rights and Responsibilities Statement on file	1				
3. Consent to Release and/or Obtain Confidential Information	1				
4. Proof of positivity in client file	1				
5. Signed and complete HOPWA application on file	1				
6. Description of client's ER situation and housing plan fully documented on ER worksheet and reassessed each time client applies for ER assistance				1	
7. Case notes are timely, legible and complete	1				
8. Client's application is updated annually for Rental assistance or every time client's financial or household composition changes	1				

9. Appropriate section on Rental or Emergency Assistance worksheet is calculated correctly	1			
10. Correct backup documents on file (lease/mortgage stmt/utility bill)	1			
11. Verification of client income	1			
12. Rental/ER assistance worksheet signed by the client and the case manager	1			
13. Client's gross income is calculated correctly on the Gross Income worksheet	1			
14. Client's adjusted income is calculated correctly on the Adjusted Income worksheet	1			
15. Supporting documents on file verifying income	1			
16. Termination form is completed correctly each time client leaves the program			1	
17. Clear documented statement with reason for termination if client is terminated for violation of program requirements or conditions of occupancy			1	
18. Documentation of case management and supportive services offered to client	1			

19. Signed acknowledgement by client confirming receipt of Lead-Based paint and Fair Housing pamphlets	1				
20. Documentation of Housing Quality Standards inspection has been performed if client is certified for Rental Assistance	1				
21. Documentation of hard-wired or battery operated smoke detector is installed in client's residence; or for ER assistance, signed client acknowledgement is on file	1				
22. EID documentation and tracking, as needed	1				
23. Verification of applicant's tenancy (valid lease/rental agreement or provided evidence of paying rent/utilities if not named on lease/rental agreement)	1				
24. Comprehensive housing plan within client file, MCM has signed and dated:	1				
documentation of ER situation in the housing plan					
25. STRMU – amount of assistance given to client? (max 1 month assistance for each verified ER; recent each month/verified ER situation)				1	



ATTACHMENT 4: PROJECT PROPOSAL

a. Project Description:

Since 1988, Project Transitions has been deeply committed to their mission of serving persons living with HIV and AIDS providing supportive housing, recuperative care and hospice in a compassionate and caring environment. Project Transitions (PT), **as the only provider of intensely supportive housing for persons living with HIV/AIDS in the Central Texas region**, owns and operates 30 units of supportive housing for persons living with HIV and AIDS quietly tucked into their surrounding neighborhoods. Responding to the call of overwhelming need, it is now time for Project Transitions to take the next step in their history by developing more housing units for persons living with HIV and AIDS.

A further motivation for Project Transitions to expand their housing footprint is a unified response to the Getting To Zero (GTZ) Strategy, a UNAIDS commitment to end the AIDS epidemic by achieving zero deaths, zero new infections, and zero discrimination and stigma by 2030. The City of Austin's commitment to the strategy was formalized by the **Mayor's and County Judge's signing of the Paris Declaration to join the Fast-Track Cities (FTC) initiative on June 20, 2018**.

Housing has been identified as a critical component of the GTZ, as persons living with HIV/AIDS who do not have stable housing are much less likely to access and remain in medical care than are those who do have stable housing. Remaining in medical care and getting and staying on an effective medication regimen reduces a person's risk of transmitting HIV to a non-infected person to nearly zero, stopping the cycle of transmission and infection.

Please see attached recent news article that explains that the most difficult people to reach for HIV prevention and care are homeless. **For people affected with HIV, homelessness most often means the difference between sickness and health.**

PT's housing strategy in the re-development and expansion of Roosevelt Gardens and the new construction of Burnet Place Apartments serves a trifecta of public purpose: 1) response to a Public Health mandate to end the transmission of HIV by keeping people healthy and housed. 2) providing an additional 73 units of high, quality affordable and supportive housing to our City's portfolio. 3) builds the capacity of a local non-profit to continue developing additional housing.

Burnet Place Apartments is an unprecedented opportunity for Project Transitions to develop housing that is in close proximity to their main office and hospice facility tucked within the adjacent Brentwood neighborhood. The site has a bus stop located outside its front door and a crosswalk across Burnet Road will be added as part of the Mobility Bond improvements. The site is within steps to an abundance of groceries, retail, restaurants, entertainment, medical and outdoor recreation opportunities.

As is described in the Market Assessment below, various factors, including the challenging situation in the affordable housing market in Austin and the increasing need for affordable supportive housing for persons living with HIV/AIDS in Austin, require Project Transitions to take **BOLD** action to increase its capacity to serve its target population. In order to ensure high-quality affordable supportive housing for current residents and to respond to the backlogged waiting list, Project Transitions will construct 55 units at 8007 Burnet Road as Burnet Place Apartments.

- i. **Describe the proposed tenant population, income levels, and services, if any, to be provided to or made available to residents.**



At Burnet Place Apartments, 100% of the units will be reserved for persons living HIV/AIDS and offer deeply affordable housing paired with intensive wrap-around services. All units will receive HOPWA assistance through a facilities-based contract. HOPWA pays the difference between the rent received based on 30% of resident income (which is minimal) and the expenses and supportive services for the property based on budget.

Burnet Place Apartments will be 55 units of affordable, multifamily rental units in a supportive environment. The proposed unit mix is reflective of the housing needs of PT's current client population. Currently there are only 5 households on PT's 2-bedroom waitlist and over 50 individuals on the 1-bedroom waitlist with a 1.5 year long wait for service. This is a reflection of the HIV epidemic (who is getting infected), the priorities of other housing providers in Austin (families with children tend to be housed a bit faster) and the configuration of PT's existing units (not having enough 1-bedroom apartments.)

Unit Type	# of Units	Square Footage
STUDIO	55	350
TOTAL UNITS	55	19,250

Number and percentage of units by Median Family Income level:

Median Family Income Level	# of Units	% of Total Units
30% MFI	11	20%
40% MFI	11	20%
50% MFI	33	60%

Of the households served in 2018, 78% were 0-30% of the MFI, and 22% were 31-50% MFI. No households were above 50% MFI reflecting the deep and expansive impact of PT's housing program.

The following is a list of **wrap-around support services** made available to everyone in PT's programs that shepherd clients on the journey to independent living and recovery:

- Assistance finding permanent housing
- Client needs assessment (housing, socio-social, financial, medical, mental health/subs use, interpersonal, items/assistance for daily living) – done at admission and at least annually, or when changes occur, or client meets larger goals
- Resource acquisition/connection/referral
- Connection to financial benefits (e.g., Social Security, SNAP benefits, emergency assistance in the case of any financial difficulties)
- Problem-solving around any issue
- Budgeting
- Skill building
- Goal setting
- Connection to medical care – including setting appointments/rescheduling, system navigation, talking with providers, self-advocacy during medical appointments, etc
- Medication adherence – getting refills, taking medications, barrier reduction, behavior change
- Increasing health literacy, disease education



- Conflict resolution – for familial, neighbor or other relationships; navigating relationships
- Grief counseling / emotional support
- Food Bank
- Monthly meetings to discuss goals, progress on goals, and address any emerging issues.
- Connection/Referral to job training, education
- Transportation to/from medical or other appointments
- Wellness checks
- Breakfast program
- Coping skills/boundaries
- Group activities such as support groups, cooking classes, wellness activities
- Emergency utility assistance

ii. Indicate the number of units reserved for Housing Choice Voucher holders.

It is expected that all units at Burnet Place Apartments will receive HOPWA assistance through a facilities-based contract and therefore will not be available for Housing Choice Voucher holders; however, if a unit becomes available that is not subsidized with HOPWA operating assistance it will be available to a Housing Choice Voucher holder.

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

At a minimum, 10% of the total units (6 units) will be designed for persons with mobility impairments. In addition, at a minimum, 2% of total units (2 units) will be made accessible for persons with hearing and visual impairments.

iv. If Applicable, demonstrate the Project's compatibility with current Neighborhood Plan.

The proposed Burnet Place Apartments is to be developed on a property containing an existing structure in the Wooten Neighborhood. The Crestview-Wooten Neighborhood Plan was adopted on April 1, 2004 by the City of Austin. The plan's vision is complementary to the redevelopment of Burnet Place Apartments specifically evidenced by the following goals:

- Maintain and enhance the single-family residential areas as well as existing community facilities and institutions in the Crestview and Wooten neighborhoods. **[PT's first breath occurred in the neighboring Brentwood Neighborhood with the establishment of Doug's House on Justin Lane. PT's main office is the Crestview Shopping Center in the Crestview neighborhood. Roosevelt Gardens has been a part of the Brentwood neighborhood since its inception. PT is an existing community institution that will be expanded with the development of Burnet Place Apartments.]**
- Any new development or redevelopment should respect and complement the single-family character of the neighborhood. **[The structure located on the site of 8007 Burnet has had a negative impact on the neighborhood through a sordid history of use and ownership. The building is currently abandoned and is a source of blight along Burnet Road but also to the single-family neighbors it abuts on either side and in the back. This property will be developed with care and attention paid to the back portion of the property so that the new project will weave into the neighborhood fabric and be a value-added asset.]**



- Target and encourage redevelopment of dilapidated or vacant multi-family structures into quality multi-family. **[The vacant structure will be newly developed in a thoughtful and aesthetically pleasing way to take advantage of the Burnet Road frontage while dramatically stepping down to blend into the neighborhood in the back portion of the site.]**

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

The total cost to construct the 55-unit Burnet Place Apartments is approximately \$11,638,883. The sources of funds for this project include:

City of Austin, in the total amount of \$7,216,108. These funds will be used for acquisition and pre-development and/or hard and/or soft costs. Since this project is serving a very special needs population with a fixed subsidy amount, the project will only be feasible if there is no debt service to repay. As the only provider of intensively supportive housing for persons with HIV/AIDS in Central Texas, the City of Austin is necessary to rapidly deliver units to meet its shared goal of Getting to Zero. We request these funds from the City to be in the form of a deferred forgivable loan with a loan term of at least 40 years.

TDHCA Multifamily Direct Loan, in the amount of \$2,000,000. The funding application for these funds will be submitted in June 2019. We will be applying under the Supportive Housing set-aside which provides deferred, forgivable funding to Supportive Housing projects and those projects with significant units set-aside for persons with Extremely Low Incomes and Special Needs.

Federal Home Loan Bank San Francisco, in the amount of \$1,050,000. An application was submitted on March 1, 2019 and award notifications will be made in June. The funding will be available as a grant with a land use restriction agreement containing FHLB affordability requirements.

Deferred Developer Fee in the amount of \$552,208. As a mission-based, non-profit that is not reliant on developer fees for financial survival, it is very customary for a portion of the developer fee to be deferred as a project source.

Private Fundraising in the amount of \$820,567. This amount will also be fundraised as part of a capital campaign that will include funding from foundations, individuals and other AIDS Services Organizations.

vi. If the property is occupied by residents at the time of application submission, specify that along with the following additional information: Include details on the type of structures (multi-family or single-family), number and size of units in square feet.

The existing structure has been vacant for over a year and there are residents living at the property.

vii. 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 any other City of Austin density bonus program.



Burnet Place Apartments is located within a VMU on Burnet Road. The front portion of the building that will be newly constructed is zoned GR-MU with the back portion that will be maintained within the existing building footprint is SF-3.

viii. Indicate how the project will meet SMART Housing requirements.

An application for SMART Housing certification was submitted on 4/25/2019. A SMART Housing Certification letter will be forwarded as an addendum to the application once received.

Safe – Burnet Place Apartments will eliminate any potential safety concerns arising out of the existing structure that has remained a source of blight for over a year and rebirth it into a well-managed, safe and beautiful building that is an asset to the neighborhood.

Mixed Income – Burnet Place Apartments will provide a range of incomes from 0-50% MFI with stair-staggered levels of affordability in a neighborhood quickly becoming unaffordable.

Accessible – Burnet Place Apartments will be developed to be accessible to its target population meeting and/or exceeding the City's minimum requirements.

Reasonably Priced – Units at Burnet Place Apartments will be leased to residents without regard to an ability to pay. Residents will pay 30% of their income toward rent with HOPWA funding covering the difference between rental income received and operational expenses for the property.

Transit-Oriented – Burnet Place Apartments is located on Burnet Road – a core transit corridor – with a high frequency bus stop located right outside the front door.

San Francisco could become the first US city to eliminate new HIV infections

By Maria L. La Ganga

[Los Angeles Times](#)

[\(TNS\)](#)

SAN FRANCISCO — In a different city, in a different decade, the news would have changed David's life forever.

Instead the graduate student, who dreams of some day acting and teaching, told himself one thing as he waited for test results in the San Francisco General Hospital emergency room: "If it comes back and it's positive, just do what you can to stay healthy. ... If it comes back negative, be even more careful."

David's HIV test was positive.

Two days later, he met with a social worker in Ward 86 — the first dedicated HIV clinic in the U.S., founded in 1983. He got help, that same day, to sign up for insurance he can afford. He got a starter pack, that same day, of antiretroviral therapy and a prescription for more medication.

When his pharmacist told him there would be a \$1,195 co-payment, his social worker made the co-pay go away. David, who is 33 and spoke on the condition that his last name not be used, takes two tablets each day: Descovy, a sky blue rectangle with rounded corners, and Tivicay, a small circle of corn silk yellow.

After two weeks, the virus was undetectable in David's blood. As long as he stays on medication, HIV will not determine his future. Just as important, he will not transmit the disease to anyone else.

David's success is San Francisco's success. This city is on course to be the first in the country to eliminate new HIV infections — or at least come close. President Donald Trump pledged in his State of the Union speech that the U.S. will "eliminate the HIV epidemic ... within 10 years." San Francisco is in position to get there first.

More than 2,300 new, full-blown AIDS cases were diagnosed here in at the peak of the epidemic in 1992. The most recent statistics available, from 2017, showed that 221 people were diagnosed with HIV that year, the virus that causes AIDS. When the 2018 statistics are released in September, that number is expected to be around 190.

"San Francisco is a model for the rest of the nation," said David C. Harvey, executive director of the National Coalition of STD Directors. "Some states and cities ... do not have the resources of San Francisco and will have a problem replicating the exact model. But places like San Francisco, New York City and Seattle — with San Francisco leading the pack — are important jurisdictions at showing the rest of the country what is possible."

The immediate goal of the city's Getting to Zero campaign is to reduce new HIV diagnoses by 90 percent between 2013, when there were 394 cases, and 2020. San Francisco is only about halfway there, but is moving faster than the nation as a whole and any other big city.

The first step in its three-pronged approach is rapid testing and antiretroviral therapy to keep people healthy and stop the spread of infection. Next is the widespread prescription of PrEP, a.k.a. pre-exposure prophylaxis, a pill that keeps healthy people from getting infected. And finally, a network of outreach workers find people who have stopped regular HIV testing and work to get them back into care.

The city's greatest success has been in reducing the rate of infection among gay men. And the biggest challenges? Reaching African American men, whose infection rate is the highest, and making sure infected homeless people receive the medical care they need. That effort was strengthened last week with the announcement of San Francisco's first POP-UP clinic, under the direction of Dr. Monica Gandhi, medical director of Ward 86. (POP-UP stands for Positive-health Onsite Program for Unstably housed Populations.)

Trump's State of the Union address devoted just 81 words to the subject of HIV. But his pledge to eradicate the disease resonated here in the city where AIDS ended so many young lives and galvanized generations of scientists, doctors and activists.

Dr. Diane Havlir, a co-founder of Getting to Zero, was a young medical resident here during the epidemic's darkest days.

The AIDS patients she saw were her age, she said, "and they were sick and they were dying and some were blind and some had purple spots all over their bodies and we knew about some of the infections, but we had no treatment. And once we started getting treatment, the treatment was very, very rough on the patients."

Havlir, who is a professor at the University of California, San Francisco and head of the HIV program at San Francisco General, was heartened by Trump's pledge, which she said "broke the silence" about HIV that this administration has had. But pledges alone aren't enough, she said. "We need science. We need community involvement. We need funding."

Trump's 2020 budget asks for \$291 million for the effort in its first year. But it also proposed cuts to Medicaid and other programs that are central to the fight against HIV. The result, said the Act Now End AIDS Coalition, is a federal budget that "fundamentally undermines the ambitions" expressed by the Trump administration.

However, Harvey said, the administration has since said it will reallocate some funding to HIV eradication in the 2019 fiscal year. "This is good news," he said.

David, who is working toward his masters of fine arts degree, received care through the Rapid ART Program Initiative for HIV Diagnoses. Its goal is to make sure that people who test positive are offered antiretroviral therapy within five days of diagnosis.

RAPID has had a significant impact. From 2013 to 2016, the percentage of patients linked to care within a month of being diagnosed with HIV rose from 72 percent to 83 percent. The median number of days between starting medical care for the infection and receiving antiretroviral therapy dropped from 27 days to zero, according to the San Francisco Department of Public Health.

And then there is PrEP.

When Rand Hunt talks about the pre-exposure medication, he sounds as if he has just witnessed a miracle.

He was born in 1984, the year HIV was identified as the cause of AIDS, and has lived his entire life in the shadow of the epidemic. He is a web designer, an activist in San Francisco's leather culture, and he is HIV negative. He does not foresee his status changing.

All because of a small blue pill, Truvada. The Centers for Disease Control and Prevention says that when it is taken consistently "it has been shown to reduce the risk of HIV infection in people who are at high risk by up to 92 percent." When used with a condom, it is even more effective.

"I never had a gay reality without HIV, and now I'm immune," Hunt said. "The awareness is like the dawn, the sun coming up, the plague being over. ... For me, it means that I can be present when I have sex instead of being, like, 'The condom's gonna break and I'm gonna die.'"

Dr. Susan Buchbinder, who directs the health department's Bridge HIV program and co-founded Getting to Zero, said the city has gone from an estimated 4,400 people on the drug in 2014 to between 16,000 and 20,000 people today.

Among the largest providers is Magnet, a men's sexual health clinic in the Castro district run by the nonprofit San Francisco AIDS Foundation. Because it is not government funded, there are no restrictions on who it can serve, although it tends to focus on what Pierre-Cedric Crouch describes as clients on the "gay, bi and transmasculine spectrum."

Crouch, who is Magnet's director of nursing, said "half of what we do every day is PrEP. There's a big demand."

(EDITORS: STORY CAN END HERE)

The most difficult people to reach for HIV prevention and care are homeless.

Although homeless people make up just 1 percent of the city's population, they account for 14 percent of newly diagnosed HIV cases, according to the health department. While 70 percent of housed people with HIV have the virus under control, only a third of homeless people do.

Ebony, Dacquri and their 9-year-old son have bounced among shelters and friends' sofas, the occasional motel and the street for at least the past nine months.

Both women are HIV positive. Ebony has diabetes and untreated Stage 4 cervical cancer.

For a week in mid-February, they had had a motel room paid for them in the Mission district. But when that week ended, they didn't know what to do.

For people infected with HIV, homelessness can mean the difference between sickness and health. If you have no roof over your head, your medication can get lost or stolen or confiscated in a police sweep. If you do not know where your next meal will come from, keeping a doctor's appointment isn't the highest priority.

So at 9 a.m. on a rainy Thursday, the two women called Midori Harvey, an outreach worker with a program called LINC, which connects people with HIV who have fallen out of care to clinics and medication.

Harvey, who has worked with the family since August, helped persuade the women to go on antiretroviral therapy and got them on a list for more permanent shelter. But the wait is long.

At 4 p.m., Dacquri, 32, and her son stood on Grove Street outside of the Compass Family Services office. The family's belongings lay piled on the damp sidewalk. Ebony, who is 36, was inside trying to get a place for the night.

"Our health ain't that good," Dacquri said. "Our boy can't be out here in the cold."

Ebony burst out of the Compass office, holding their little black dog. They had secured a motel room for another week.

"I have my fingers crossed until something better comes along," Ebony said.

Something to call a home. Let their son enroll in school.

Hold the virus at bay.

Related



ATTACHMENT 4: PROJECT PROPOSAL

b. Market Assessment:

Since 1988, Project Transitions has been deeply committed to their mission of serving persons living with HIV and AIDS providing supportive housing, recuperative care and hospice in a compassionate and caring environment. Project Transitions (PT), as the only provider of intensely supportive housing for persons living with HIV/AIDS in the Central Texas region, owns and operates 30 units of supportive housing for persons living with HIV and AIDS quietly tucked into their surrounding neighborhoods. Responding to the call of overwhelming need, it is now time for Project Transitions to take the next step in their history by developing more housing units for persons living with HIV and AIDS.

i. Evaluate general demographic, economic, and housing conditions including:

1. Target Population and Area Demographic Makeup:

The target population of Burnet Place Apartments is persons living with HIV/AIDS in need of supportive housing. According to Neighborhood Scout, the neighborhood surrounding the property has a demographic makeup as follows with Project Transition's target population demographics in brackets adjacent:

- **Race and Ethnic:** 30.9% White, 2.0% Black or African American, 3.1% Asian, 62.2% Hispanic or Latino of any race. [Currently in PT's program: 33% Black or African American, 33% White, 33% Latino/a, and 1% Asian.]
- **Median Household Income:** \$54,176 [Currently in PT's program: 78% of residents have incomes less than \$15,000 and no households have incomes over \$25,000.]
- **Average Market Rent:** \$1,382 [Average market rent in PT's program is \$662 with all bills paid; however, clients will actually only pay 30% of their income toward rent with the remaining amount covered by HOPWA assistance.]
- **Age:** 18.1% are 18-29, 27% are 30-44, 19.0% are 45-64, 7.9% are 65 years and over. [Currently in PT's program: 46% of residents are over 50 years old.]
- **Household Type:** 26.9% are 1-person households [Currently in PT's program: 60.08% are one person households and 39.2% are more than one person.]
- **Gender:** 49.3% are male and 50.7% are female. [Currently in PT's program: 28% female, 7% transgender.]

2. Overall Economic Conditions and Trends:

The neighborhood surrounding Burnet Place Apartments has a median real estate price of \$394,055 which is more expensive than 90% of the neighborhoods in Texas and 76.3% of the neighborhoods in the U.S. Also according to NeighborhoodScout, the average rental price is \$1,382 which is higher than 67.2% of the neighborhoods in Texas. NeighborhoodScout reports that this neighborhood has a higher income than 49% of the neighborhoods in America.

Please see attached NeighborhoodScout Report for additional information on Economic Conditions and Trends for this neighborhood.



It is important to note that while the information being provided is focused on the neighborhood surrounding the proposed site, clients served by the Project Transition's Housing Program that will be housed at Burnet Place Apartments come from the surrounding five-county region of Central Texas. While the footprint of Project Transition's is currently very small, their reach is far.

3. General Housing Conditions and Trends in the Community

A description of the neighborhood surrounding Burnet Place Apartments according to NeighborhoodScout:

"This is an urban neighborhood (based on population density) located in Austin, Texas.

This neighborhood's real estate is primarily made up of small (studio to two bedroom) to medium sized (three or four bedroom) single-family homes and small apartment buildings. Most of the residential real estate is occupied by a mixture of owners and renters. Many of the residences in this neighborhood are older, well-established, built between 1940 and 1969. A number of residences were also built between 1970 and 1999.

Home and apartment vacancy rates are 9.5% in this neighborhood. NeighborhoodScout analysis shows that this rate is lower than 46.5% of the neighborhoods in the nation, approximately near the middle range for vacancies."

For the neighborhood surrounding Burnet Place Apartments, NeighborhoodScout cites home value appreciation and existing housing economic fundamentals as ranked in the top 20% of all neighborhoods in the nation for investment security. The average rent price trend in the neighborhood over the last five years has increased by 4.6% compared to only 2.5% for the nation.

ii. Identify the geographic area

Burnet Place Apartments is located in census tract number 48453001818 in the Wooten Neighborhood. Please see attached NeighborhoodScout report for the boundary outline. Due to the special needs population served by Project Transitions, prospective residents at Burnet Place Apartments will pull from the surrounding Central Texas five-county region.

iii. Quantify the pool of eligible tenants

With a target population of low-income persons living with HIV/AIDS, the pool of eligible tenants is estimated at 2,043.

From the Integrated HIV Prevention and Care Plan, 2016 Austin HIV Planning Council:

In 2015, there were 5,521 People Living with HIV/AIDS (PLWH) in the five county Target Geographic Area (TGA), with over 300 new diagnoses that year. Most (89%) of new HIV cases were in men and 80% reported an exposure category of men who have sex with men (MSM). White PLWH (2,347) made up the largest number of Austin TGA residents with HIV in 2015, but had the lowest prevalence and incidence rate.



*Mirroring national trends, Black MSM bear a large burden of disease in the Austin TGA, with new diagnosis rate of 794 per 100,000 in 2015. Since 2011, new diagnoses in Hispanic and young (under 35) populations have grown compared to other ethnicities and older age groups. Income directly affects the ability to pay for health care. A total of 5,521 PLWH reside in the Austin TGA and approximately 37% **(2,043)** live below 200% of the federal poverty level (FPL) according to a U.S. Census Bureau poverty status report. In the Austin TGA an estimated 1,358 PLWH were uninsured in 2015.*

Note: these figures are based on “known” persons with HIV. It is estimated that 13-17% of people living with HIV have not been diagnosed and therefore do not know it.

iv. Analyze the competition

Project Transitions is the only provider of intensely supportive affordable housing for low-income persons living with HIV/AIDS in Central Texas. There is not another provider in the Austin market that combines a high-quality housing unit paired with hyper-focused, wrap-around services specially focused on persons living with HIV/AIDS and therefore there is no competition.

Project Transitions does administer a TBRA program for clients who are ready to transition to independent living and therefore can be served by the private rental housing market. The target population for Burnet Place Apartments are persons living HIV/AIDS who are in need of intensive services to help with stabilizing and restoring health.

v. Assess the market demand

There are currently 55 people on Project Transitions’ housing waiting list, and the average time between entering the list and receiving services is 1.5 years. Project Transitions’ housing program is designed to move people from crisis and chaos to stability and independent living, and this process has typically been accomplished in from one to two years for most residents, who then moved from Roosevelt Gardens or Highland Terrace to other housing, either subsidized or private market-rate. However, the worsening shortage of affordable low-income housing in Austin has resulted in many PT housing program residents being unable to secure such housing when they reach the point of no longer needing the intensive support offered at PT’s existing housing, and it has been Project Transitions’ practice NOT to discharge such residents back to homelessness, despite the desire to serve new clients. In addition, Project Transitions provides housing at Roosevelt Gardens and Highland Terrace to persons exiting the recuperative care program at Doug’s House, Project Transitions’ residential hospice and recuperative care facility. Such persons are typically discharged from the hospital to Doug’s House in a medically fragile state and receive 24-hour care and education until their health status is improved enough for them to live in a non-medical facility. Rather than discharging these residents to homelessness, they are transferred to Roosevelt Gardens or Highland Terrace. Only by increasing its capacity – in the form of additional affordable housing units – will Project Transitions be able to offer each of these current clients a stable home and serve additional new clients.

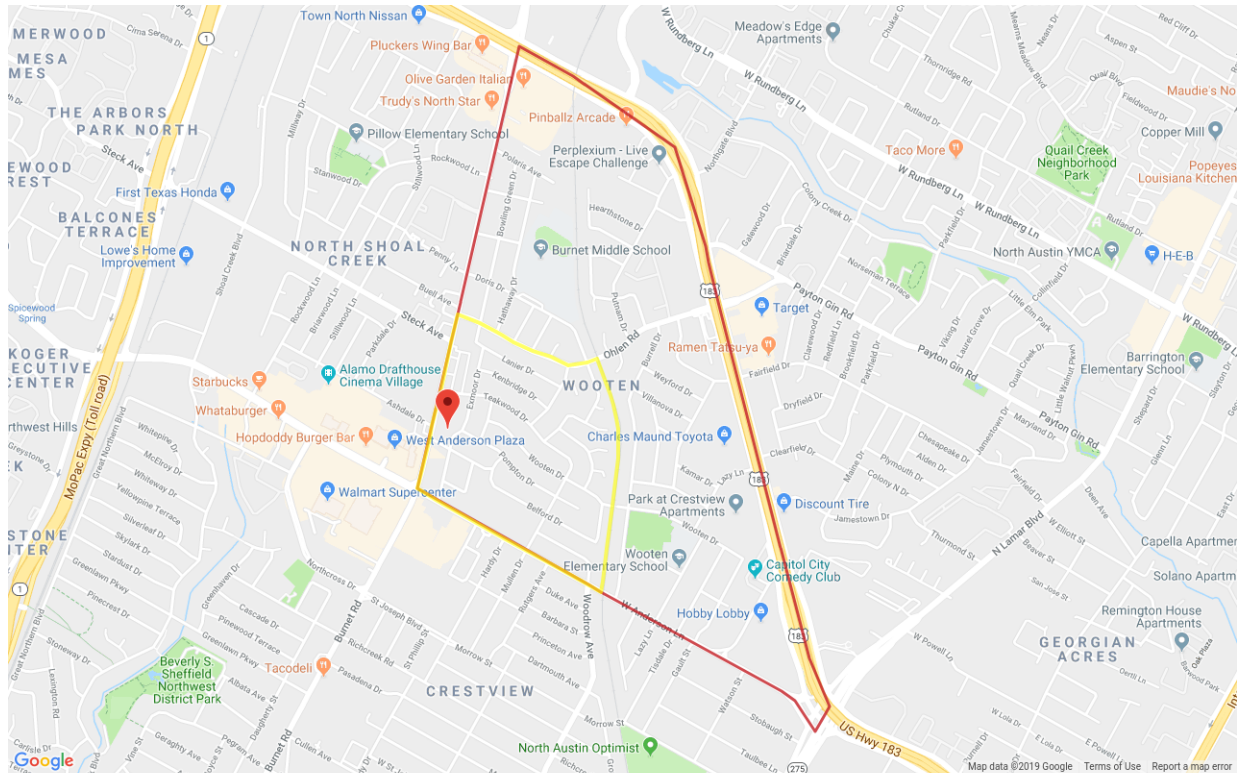
vi. Evaluate the effective demand and the capture rate

55 units/2,043 low-income people living with HIV/AIDS = **3% capture rate**



vii. Estimate the absorption period

Once construction on the redevelopment of Burnet Place Apartments is completed, the project will be filled systematically off of PT's Housing Program Waitlist and those ready to transition to supportive housing from the recuperative care offered at PT's Doug's House. It is expected that the property will be 100% occupied in 2-3 months with an estimated absorption rate of 20 units per month.



— Neighborhood Boundary — Micro-Neighborhood Boundary



ATTACHMENT 4: PROJECT PROPOSAL

c. Good Neighbor Policy:

BURNET PLACE APARTMENTS

8007 Burnet Road
Austin, TX 78757

CONTACT

Madge Whistler, Interim Executive Director
Project Transitions, Inc.
7101 Woodrow Avenue
Austin, TX 78757
(512) 454-8646
finance@projecttransitions.org

COMMUNICATIONS PLAN FOR NEIGHBORHOOD ENGAGEMENT

Project Transitions has been operating in the Brentwood, Crestview and Highland Neighborhoods that encircle the site location for Burnet Place Apartments in the Wooten Neighborhood for the past 30 years and cherishes their existing relationship with neighbors, donors and volunteers that live in these neighborhoods. Before any other facets of a development are pursued, Project Transitions will approach the neighborhood and talk to key stakeholders about the project, target population and share examples of the future development.

The following steps have already or will soon be taken to communicate with the neighborhood surrounding the proposed development located at 8007 Burnet Avenue, Austin, 78757:

Preliminary Research: Using the City of Austin's Community Registry site and general Internet searches, True Casa Consulting researched the neighborhood organizations that contain the proposed site and identified the following active organizations.

Wooten Neighborhood Association
Wooten Neighborhood Plan Contact Team

- 1) **Neighborhood Contact:** Project Transitions will reach out to the priority neighborhood organization(s) to share info on plans for the development of Burnet Place Apartments. NHCD will be updated once those meetings have occurred.



- 2) **Neighborhood Notification** – At this time, we are still undergoing due diligence on the development plan. We do not anticipate a zoning change being necessary, but are hopeful that we will be able to apply the Affordability Unlocked resolution to this site. If it is determined that a zoning change or CUP will be needed, we ask that the notifications sent out for purposes of the zoning change account for notification under this policy. If not, as mentioned above, we do plan to reach out to neighborhood and publicly engage, as a neighbor, on the plans for development of the site.
- 3) **Neighborhood Engagement** – At the upcoming neighborhood meeting, Project Transitions will present information about their organization, plans for design of the building and talk about who will live at the property and what services will be offered. PT may invite a board member or one of their residents to speak.
 - After initial phone contact, meetings will be scheduled with any organization that should request such. PT will make sure that the neighborhood organization is plugged into the development and milestones and progress along the way.
 - PT will create a social media platform that will contain the most updated information on the project for easy public dissemination.
 - PT will invite neighborhood members to volunteer events to get more involved with the organization.
- 4) **Implementation/Ongoing Relations** - Project Transitions, Inc. will implement the following processes to encourage ongoing relations with neighborhood members:
 - Neighborhood members will be invited to the Ground Breaking and Ribbon Cutting events that will be held for the property. Neighborhoods will be given recognition for their support.
 - PT will invite neighborhood members to participate in services programs being offered at our community.
 - PT will invite and educate neighborhood members on the many ways to volunteer with the organization.
 - PT will establish an open-door policy so that neighborhood members will feel comfortable communicating any concerns with either the on-site property management or the single point of contact.

*****PLEASE NOTE THAT A CITY OF AUSTIN GOOD NEIGHBOR CHECKLIST WAS NOT PART OF THE APPLICATION MATERIALS NOR AVAILABLE ON THE WEBSITE.**



ATTACHMENT 4: PROJECT PROPOSAL

d.SMART Housing:

Project Transitions, Inc. submitted an application for SMART Housing on 4/26/2019. A certification letter will be forwarded to City staff as soon as received.



ATTACHMENT 4: PROJECT PROPOSAL

e. MOU with ECHO:

15% of total units set aside for Continuum of Care

Project Transitions' mission in operating a housing program is to serve persons living with HIV/AIDS. The organization's target population consists of extremely low-income persons living with HIV/AIDS who are homeless or at imminent risk of homelessness and who require specialized and targeted services designed to improve their health status, specifically related to HIV/AIDS. The outcomes of the program are twofold: clients have high-quality affordable housing and the skills to maintain it in the future, and clients have improved health status.

Project Transitions identifies eligible housing clients through various channels. Case managers from other AIDS service organizations refer clients, and some clients self-refer. Other clients are referred by hospitals to Doug's House, Project Transitions' residential hospice and recuperative care facility, for recuperative care and then become eligible for housing when they no longer need the level of medical care provided at Doug's House. Common across all clients who are admitted to Project Transitions' housing program is a need for – and the ability to benefit from – the supportive services offered. Accurate assessments require the specialized expertise that the organization has developed over many years.

Through multiple conversations with ECHO, Project Transitions feels very comfortable setting aside 15% of the units at Burnet Place Apartments as COC units serving individuals off the Coordinated Assessment list that are HIV positive. Staff from both organizations are working together to assess the current overlap that exists regarding the PT waiting list of clients and the Coordinated Assessment list. We believe there will be a lot of overlap. This will help PT better gauge whether they can drive the % set-aside even higher.

An MOU will be requested from ECHO staff and will be provided once reviewed and executed.



ATTACHMENT 4: PROJECT PROPOSAL

f. General Services:

Since 1988, Project Transitions has been deeply committed to their mission of serving persons living with HIV and AIDS providing supportive housing, recuperative care and hospice in a compassionate and caring environment.

i. **A description of the services to be provided to residents and/or clients.**

Project Transitions provides affordable, transitional housing for HIV+ individuals and their families with wrap-around services by professional social workers. Every resident has a personalized Individual Development Plan to help them attain the skills and resources needed to live independently. Staff also provides life skills training, relapse prevention, counseling, as well as educational and vocational guidance.

Housing Services to be provided at Burnet Place Apartments include:

- Counseling
- Medical education
- Disease education
- Resource education
- Family counseling
- Mental health support through check-ins and medical monitoring
- Group counseling
- Harm reduction planning
- Relapse prevention planning
- Personal finance coaching
- Career building skills
- Employment resource referral
- Partner with permanent housing options including public housing, section 8, Foundation communities to bridge clients with safe, affordable permanent housing
- Personal finance counseling
- Hardship rental assistance
- Social skills building
- Independent living skills
- Social activities such as crafts, BINGO, movies
- Therapeutic gardening
- Community engagement
- Community center that is open to all residents in every program
- Continental breakfast 5 days a week: Mondays- Friday
- Saturday breakfast provided by a local church
- Computer lab
- Resident center phone for resident use
- Capital Area Food Bank pantry onsite



Hospice/Recuperative Care Services provided at Doug's House include:

- Full-time social worker on premises
- Counseling case management
- End of life planning; wills, DNRs, funeral
- Full-time nurse at Doug's House
- Private room
- Cable/ Internet/ WiFi
- Oversight of medical care
- Daily check-ins
- Physical assessment
- Wound care
- Medicine refills and ordering; adherence counseling
- Transportation to and from appointments/ companionship and advocacy
- Breakfast, lunch and dinner and snacks for all residents
- Full holiday meals and community celebration events
- Family counseling
- Connect clients and family members to case management, therapy, dental services, STS, and CARTS
- Develop medical care plan with client and team (doctor and family)
- Medical education; diagnosis, labs, referral
- Assistance with disability application
- Resident memorials
- Social activities among residents

ii. Number and types of residents/clients expected to be served annually.

100% of the clients served by Project Transitions are persons living with HIV/AIDS. Most of these clients were formerly homeless or at-risk of homelessness before accessing PT's services. Burnet Place Apartments proposes to serve 55 households annually; 100% of households will be admitted having income below 200% of the Federal Poverty Guidelines; at least 60% will be persons of color; at least 65% will be persons with a history of mental health or substance abuse issues; at least 30% of residents will be female.

iii. Developer's experience and qualifications in providing the services to be offered.

Project Transitions has been providing intensive supportive services to persons living with HIV/AIDS since 1989 when the doors to their hospice facility were first opened (hospice facility later named Doug's House.) Since that time, Project Transitions' compassionate embrace has widened to incorporate two project-based sites and a Community Housing Program that provides subsidized rent assistance and support services for those living off-site.

iv. External service provider – N/A

v. Resumes of key personnel involved in the delivery of services:

Please find attached resumes for the following key personnel involved in the delivery of services at Burnet Place Apartments:



- Todd Logan – Director of Client Services
- Erika Hultquist – Housing Program Coordinator
- Karla Vargas – Senior Housing Specialist

vi. Financial capacity of the Services provider:

- a. 3-Year Service budget for Burnet Place Apartments is attached.

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

awarhol@austin.rr.com (512) 565-2916

EDUCATION

UNIVERSITY OF TEXAS, AUSTIN
UNIVERSITY OF SOUTH FLORIDA

Masters, Social Work, 1993
Bachelors, Sociology, 1983

KNOWLEDGE AND SKILLS

- Program Coordination
 - Project Management
 - Workgroup and Meeting Facilitation
 - Supervision, Leadership
 - Performance Monitoring and Evaluation
 - Track Program Performance with Data
 - Training, Case Management
 - Categorical Eligibility Programs
 - Grants Management
 - Contracting
 - Disparate/Affected Populations
 - Community/Stakeholder Relations
- Knowledge of:
- Substance Abuse and Mental Health
 - Corrections
 - Brief Therapy, CB Therapy, MI

EXPERIENCE

Director of Client Services, April 2016 to present

PROJECT TRANSITIONS, INC.

Act as second-line supervisor for 2 programs: a 5-bed special care facility and housing program with 30 apartments. Provide vision, set program goals, collect and analyze data to track program performance, provide all public grants reporting, interface with funder, facilitate weekly program meetings and supervise front-line program coordinators. Redesign internal systems to bring in line with the current environment.

Special Projects Coordinator, January 2015 to March 2016

TEXAS DEPT OF STATE HEALTH SERVICES

Program project manager. Engage in system transformation, implementing a new medical intervention statewide (PrEP) and oversee planning for statewide conference of 1000 participants; assist in goal setting, design strategies, organize activities, track progress, determine next steps and oversee workgroups including setting agendas and facilitating meetings. One project involved 7 workgroups: community engagement/awareness, provider recruitment, work force training and ensuring equitable access for uninsured persons.

Service Integration Coordinator, October 2010 to December 2014

TEXAS DEPT OF STATE HEALTH SERVICES

Program coordinator responsible for 4 year federal grant: identify funding, write successful application, oversee budget of \$350,000 annually. Set vision for 4 strategies, track deliverables, interface with funder, complete reporting, develop request for proposals, write contracts and monitor contractor performance. Facilitate workgroups without managerial authority, learn new subject areas and persuade stakeholders outside normal scope. Integrate health screenings at 6 substance use treatment centers to address access disparities; provide TA, address systems issues, design data collection and conduct evaluation. Work with laboratories, providers, CBOs.

Special Projects Coordinator, January 2006 to September 2010

TEXAS DEPT OF STATE HEALTH SERVICES

Perform project management on 5-6 projects for all areas of operation. Research issues, assemble workgroups, facilitate meetings, assign duties, monitor progress. Act as policy lead; handle legislative, upper management and funder information requests. Projects: revision of case management standards; community engagement/media campaign for special population; web-based prevention; point of care testing procurement, distribution and standards; data security; planning/change management to integrate new procedures at 64 clinics statewide.

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

awarhol@austin.rr.com (512) 565-2916

EXPERIENCE (CONTINUED)

Training Specialist IV, November 1999 to December 2005

TEXAS DEPT OF STATE HEALTH SERVICES

Provide classroom instruction, skill building, on-site session observation and feedback to new staff on risk assessment and behavior change counseling. Act as point person for new system of 18 different group and community-level evidenced-based interventions implemented across 30 agencies. Provide technical assistance, on-site session observation and feedback, consult with original researchers and act on over 40 requests to tailor programs. Develop statewide technical assistance bulletins. Additionally, provide instruction and technical assistance on measuring client behavior change following engagement in these psycho-educational interventions; assist all contractors in setting goals and pre/post measures.

Educational Services Specialist, January 1992 to October 1999

TEXAS DEPT OF HUMAN SERVICES

Provide classroom instruction and on-the-job training to new employees determining eligibility for Food Stamps, Temporary Assistance to Needy Families and Medicaid. As management trainer, provide instruction on civil rights, sexual harassment, supervisory skills and the personnel process. Act as mediator to resolve conflicts in supervisory relationships, mentor supervisors, negotiate performance improvement plans. Act as 2nd level supervisor of training operations with 60 employees for 8-months. Conduct teambuilding for low-performing work groups; Create and facilitate town meetings.

Social Service Supervisor, November 1989 to December 1991

TEXAS DEPT OF HUMAN SERVICES

Supervise 22 staff performing 10 different functions at over-burdened facility serving 10,000 clients. Manage all points of access: scheduling for 20 caseworkers totaling 400 appointments weekly, sign-off on \$500,000 benefit issuance yearly, oversee weekly problem resolution traffic of 350 clients through front desk and 1000 phone calls; handle all client complaints, automate older systems, plan and implement quality assurance measures. Evaluate employee performance, write employee evaluations, hold counseling conferences, set corrective action plans, and implement the personnel process.

Eligibility Worker III, November 1988 to October 1989

TEXAS DEPT OF HUMAN SERVICES

Supervise 5 staff; manage small Medicaid office out-stationed within large public hospital.

Social Service Supervisor, November 1986 to June 1987

FLORIDA DEPT OF HEALTH

Plan and implement new Medicaid unit across 5 public health clinic and hospital locations. Determine sites, build relationships with providers, negotiate logistics, and create systems. Supervise 11 staff; evaluate employee and site performance, manage operations.

OTHER EXPERIENCE

Adolescent and Family Counselor

YOUTH OPTIONS (LIFEWORKS)

Counsel low-income, at-risk youth and their families in crisis; establish rapport, identify issues, facilitate goal setting, problem-solve, utilize family resources, support strengths, write treatment plans and track progress. Conduct adolescent and separate adult parenting group.

Therapist

WATERLOO COUNSELING CENTER,

Engage in long-term therapy with newly diagnosed HIV-positive individuals. Work on issues of depression, fear, shame, anxiety. Conduct couples counseling, assist facilitation of a men's group.

Group Facilitator

OUTYOUTH, AUSTIN

Facilitate weekly peer support groups; one for high school guys and another for men 18-21 years.

Erika Hultquist
7105 A Cannonleague Drive
Austin, TX 78745
512-914-4324
erikahultquist@gmail.com

OBJECTIVE

To obtain a position which utilizes my knowledge, strengths, and practical experience.

EDUCATION

August 1999 University of North Texas Denton, TX
Bachelor of Social Work
GPA: 3.43 Major GPA: 4.0
4.0 Honor Roll, Fall 1998 and 3.5 Honor Roll, Spring 1999

WORK EXPERIENCE

2014-present Project Transitions Austin, TX
Housing Program Coordinator

Coordinate programs and services of Housing Program. Maintain understanding of HOPWA Program Rules and. Implement HOPWA Regulations and ensure internal program guidelines meet grant requirements. Create and update agency policies to ensure best practices of program and grant requirements. Complete monthly program monitoring and outcome reporting of program. Assist with coordination of on-site maintenance and volunteers at properties. Maintain caseload of 15-30 clients. Provide Supervision to Senior Housing Specialist and BSW Intern(s). Complete and/or supervise all tasks indicated below as a Senior Housing Specialist.

2011-2014 Project Transitions Austin, TX
Senior Housing Specialist

Provided on-site Case Management, Property Management, and Hospitality Services to 30+ individuals and families affected/infected by HIV in a housing project utilizing Harm Reduction strategies. Met with clients at least monthly to create goals, implement action plans, and follow-up on progress. Utilized Motivational Interviewing skills to guide residents into goal creation which will lead to positive change in the resident's life. Discussed substance use, mental health, physical health, financial, transportation, food, and service coordination in a respectful and understanding manner. Completed financial assessments for residents as their income changes and designated financial subsidies to be received by residents in the form of rental assistance. Participated in weekly client staffing meetings with the Housing Department Team. Coordinated food bank distributions with Housing and Hospice staff for food pantry (Housing) and on-site meal delivery (Hospice) programs. Assessed for program eligibility and acuity by completing intakes with prospective residents. Participated in Quality Management activities; including application of Best Practices for services delivery and tracking. Provided after-hours Property and Case Management for residents via phone and in person if necessary.

2008-2011

AIDS Services of Dallas

Dallas, TX

Housing Case Manager

Provided on-site Case Management to 30+ individuals and families affected/infected by HIV in a housing project. Met with clients at least monthly (depending on their needs) to provide assessment, I&R, and supportive counseling to address physical and mental health, substance abuse, nutrition, safety, legal, and financial needs. Completed Care Plans in which clients identified goals and made plans for addressing these goals with clients on a quarterly basis. Conducted interdisciplinary assessments of clients on a weekly basis. Participated in the Quality Management Team, which created and implemented quality management goals. Assisted with Intakes, gathered eligibility documents, and followed up with individuals on wait list.

2005-2007

WDDC

Berkeley, CA

HIV Prevention Project Coordinator and Housing Case Manager

Coordinated a team of four to six Peer Educators. Provided weekly HIV Education groups and safer sex supplies at several homeless agencies. Ensured that HIV educational fliers and safer sex supplies were available for distribution. Ordered safer sex supplies, HIV fliers, and outreach materials. Provided intensive case management for Shelter Plus Care participants and those on the Shelter Plus Care wait list. Provided hospitality services including; cold breakfast, hot lunch, hygiene supplies, mail & phone services, I & R, homeless and domestic violence shelter advocacy and referral, childcare, and crisis counseling to up to 30 women (with or without children) daily.

2002-2004

EBCRP

Oakland, CA

HIV Early Intervention Case Manager and Program Coordinator

Assisted 40 persons with HIV/AIDS obtain and maintain housing, transportation to/from appointments, nutrition, medical care, psychological care, and substance abuse counseling. Performed on-going psychosocial assessments and updated Care Plans according to client need. Coordinated client services with various other community organizations. Served as an agency liaison to Shelter Plus Care Program. Coordinated Shelter Plus Care and Ryan White Emergency Financial Assistance programs for five Case Managers. Provided narrative reports to funding agencies on the status of three programs. Facilitated speakers and topics for monthly educational group.

1999-2002

AIDS Outreach Center

Fort Worth, TX

Housing Case Manager

Worked as part of an interdisciplinary team to assist 30 homeless people with HIV/AIDS obtain and maintain housing. Met with clients monthly in their homes to address the safety of their living conditions, finances, nutrition, transportation, substance use, legal issues, physical health, and mental health (including severe psychiatric illness and developmental disabilities). Acted as a liaison between the housing authority, the client, and the landlord. Referred clients to resources as needed, maintained a network of social service agency contacts, and provided supportive counseling.

MEMBERSHIPS

Shelter Plus Care Operations Board Member

- Alameda County 2002-2004
- City of Berkeley 2005-2007

Women Rising Project Board Member

- 2014-present

STRENGTHS

- Strong organizational skills
- Commitment and achievement motivated
- Understand the importance of documentation that is timely, concise, and informative
- Consistently recognized for high ethical standards and thoroughness in all work performed
- Skilled at bringing diverse groups of people together to pursue common goals within an organization
- Completed HIV Community Health Outreach Worker (CHOW) training in August 2005

Capabilities

- Experience working with diverse populations of race, religion, gender, and sexuality
- Proficient knowledge of Spanish, both verbal and written
- Experience working with immigrant populations from all over the world
- Knowledge of the structure of the immigration system in the United States and the resources available for immigrants.
- Extensive knowledge of LGBTQ issues in the U.S./ U.K. and experience educating and advocating about said issues.
- Knowledge of Austin affordable housing
- Experience working with vulnerable populations (I.E. Mental health, substance use, chronic illness)

Education:

December 2017: Bachelors in Social Work, The University of Texas at Austin

Experience Highlights

PROJECT TRANSITIONS

Senior Housing Specialist (January 2, 2018- Present)

- Provide case management services for approximately 30-35 residents of Project Transitions transitional housing programs.
- Facilitate residents' transition to permanent low income housing through applications, referrals and monthly follow-up.
- Provide harm reduction counseling and relapse prevention for assigned case load. Keep abreast of substance use and mental health issues; refer residents to appropriate resources when a need is identified.
- Provide counseling on an informal basis to residents and families, identify needs and make appropriate referrals to off-site services.
- Create and monitor "before care" and "aftercare" program for applicants and residents to ensure success in housing, including follow-up after a permanent housing placement occurs.
- Coordinate with other agency groups in providing support for residents. Develop effective and cooperative relations in order to do so.

PROJECT TRANSITION

Social Work Intern (August 2017- Present)

- Assist residents in meeting daily challenges of living with HIV/AIDS including counseling and case management services and access to community services, end of life issues and harm reduction planning.
- Growing knowledge of AIDS Services Organizations in Austin as well as services provided for people living with HIV/AIDS.
- Research Housing programs in Austin as well as programs like Housing and Urban Development and a subdivision of HUD, Housing Opportunities for Persons with AIDS.

STUDY ABROAD

Roots of Social and Economic Justice: An International Perspective (May 2017-June 2017)

- Gained a broader understanding of social justice, experienced the diversity and multicultural landscape of London, and explored the historical roots of social welfare and social work through immersion in London city life and focused study on pressing issues.
 - Visited social service agencies, places of religious worship, ethnic neighborhoods, and received lectures by scholars.
 - Gained a critical understanding of how the U.K. and the U.S. address pressing social challenges, and heightened awareness of the rights, responsibilities and actions of global citizenship in an increasingly global society.
-

ALTERNATIVE BREAKS AT THE UNIVERSITY OF TEXAS AT AUSTIN

Participant/Trip Leader (September 2015-March 2017)

- Planned service trip to San Francisco which included; contacting community partners, securing service projects, securing lodging, transportation, and general logistics.
- Drafted curriculum and meetings required for participants through extensive research.
- Offered mentorship to participants as needed and requested.
- Led seven participants while in San Francisco and ensured everything went smoothly during the trip.
- Facilitated daily reflections for participants to talk about what they learned and how they felt about the service and activities of the day.
- Listened, comforted, and discussed with participants when the emotional nature of the trip was too much for them.

GENDER AND SEXUALITY FRESHMAN INTEREST GROUP MENTOR AT THE UNIVERSITY OF TEXAS AT AUSTIN

Mentor (January 2016-December 2016)

- Facilitated a weekly seminar focused on successfully integrating freshmen at the University of Texas at Austin.
- Offered mentoring to freshmen outside of seminar in order to ensure students were receiving enough help.
- Created a sense of community through in-class activities and socials to help students transition into college life.

PEERS FOR PRIDE AT THE UNIVERSITY OF TEXAS AT AUSTIN

Peer Educator/Workshop Creator (August 2015-December 2016)

- Peer Educator, Queer on Campus: Presented by Peers for Pride, a program of the Gender and Sexuality Center: Serving Women and LGBTQA Communities, The University of Texas at Austin.
- Created and co-facilitated, with other students, performance-based applied theatre workshops on LGBTQA+.
- Co-facilitated workshops across the UT Austin campus as well as with community organizations Out Youth and Changing Lives Youth Ensemble.

GENDER AND SEXUALITY CENTER AT THE UNIVERSITY OF TEXAS AT AUSTIN

Student Staff (August 2014-December 2016)

- Worked independently and collaborated as part of a team to achieve the creation of a safe space for the women identifying and LGBTQ university students.
- Provided effective customer service when answering the phone as well as to people first entering the safe space
- Gathered workshop materials for the education program to use in events to spread awareness on LGBTQ issues
- Organized events and promoted them via social media in order to establish connections between The Gender and Sexuality Center and other centers on campus.

CASA MARIANELLA

Office Assistant (August 2014-May 2015)

- Worked independently and as part of a team to achieve the successful mentorship and shelter of new immigrants.
- Served as part of the office team working to keep good communication with people interested in the shelter as well as with people working to keep the shelter in good standing.
- Planned with shelter tenants to ensure their well-being and a smooth assimilation into the United States.
- Translated Spanish to English for non-Spanish speaking staff when dealing with non-English speaking clients.

UNIVERSITY LEADERSHIP NETWORK AT THE UNIVERSITY OF TEXAS AT AUSTIN

Program Assistant (August 2013-May 2017)

- Collaborated with staff and students to achieve the mentorship and guidance of hand selected, low income, University of Texas at Austin students towards a graduation time of 4 years.
 - Inputted data into the program's system to provide useful information regarding accountability of the students.
 - Researched topics in order to help the education coordinator create lesson plans for the students.
 - Compiled a filmography project in order to create documentation of the program.
 - Underwent 20+ hours of leadership development training and completed 200+ hours of professional development.
-

Supportive Service Budget**Burnet Place Apartments**

<u>Sources</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Total</u>
HOPWA (Housing Opportunities for People with HIV/AIDS)	\$241,900	\$249,157	\$256,632	\$747,689
Private Fundraising - Grants (In 2018, PT raised \$67,000 in private grants: Moody Foundation, Shield Ayres and HEB)	\$10,150	\$10,455	\$10,769	\$31,374
Private Fundraising - Individual Donors (Hill Country Ride for AIDS, SnowBall and Guess Who's Coming to Dinner?)	\$9,900	\$10,197	\$10,503	\$30,600
Thrift Shop Revenue (In 2018, PT raised \$430,000 from Top Drawer thrift store sales)	\$22,654	\$23,334	\$24,034	\$70,022
TOTAL SOURCES	\$284,604	\$293,143	\$301,938	\$879,685

<u>Uses</u>				
Program Management Salary - 0.4 FTE	\$22,050	\$22,712	\$23,393	\$68,155
Supportive Services Social Workers Salary - 2.75 FTE	\$115,500	\$118,965	\$122,534	\$356,999
24-Hour Desk Clerks	\$89,856	\$92,552	\$95,329	\$277,737
Payroll Taxes	\$17,397	\$17,919	\$18,457	\$53,773
Worker's Comp	\$1,800	\$1,854	\$1,910	\$5,564
Health Insurance	\$28,026	\$28,867	\$29,733	\$86,626
Communications (telephone/internet)	\$900	\$927	\$955	\$2,782
Supplies/Printing	\$2,500	\$2,575	\$2,652	\$7,727
Training/Travel/Mileage	\$800	\$824	\$849	\$2,473
Direct Aid - Food and Commodities	\$5,775	\$5,948	\$6,126	\$17,849
TOTAL	\$284,604	\$293,143	\$301,938	\$879,685



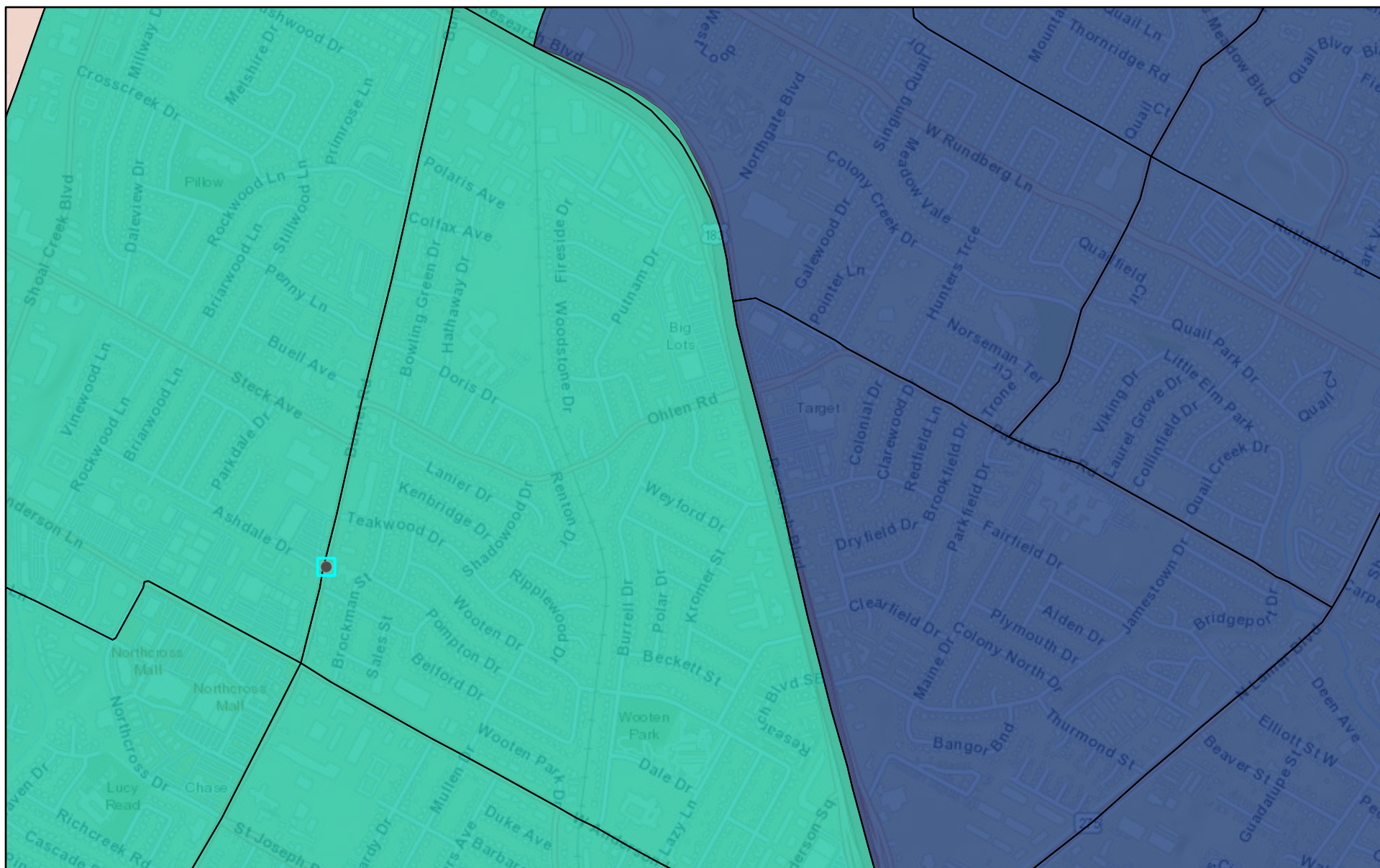
ATTACHMENT 5: PROPERTY

a. Maps of the Property:

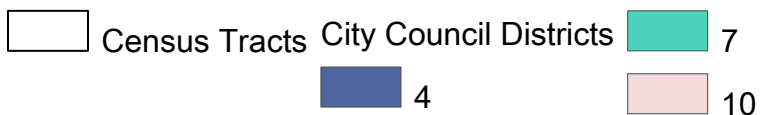
Please find attached the following maps requested:

- High Opportunity Census Tracts
- Tract at-risk of Displacement or Gentrification
- Imagine Austin Centers and Corridors
- High-Frequency Transit Stops
- Transit Stops with 0.75 walk
- Mobility Corridor
- Healthy Food Access
- 100 year flood plain

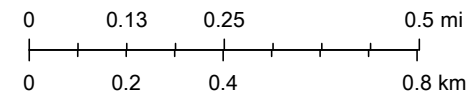
Burnet Place Apartments - 8007 Burnet Road, Austin, TX 78757



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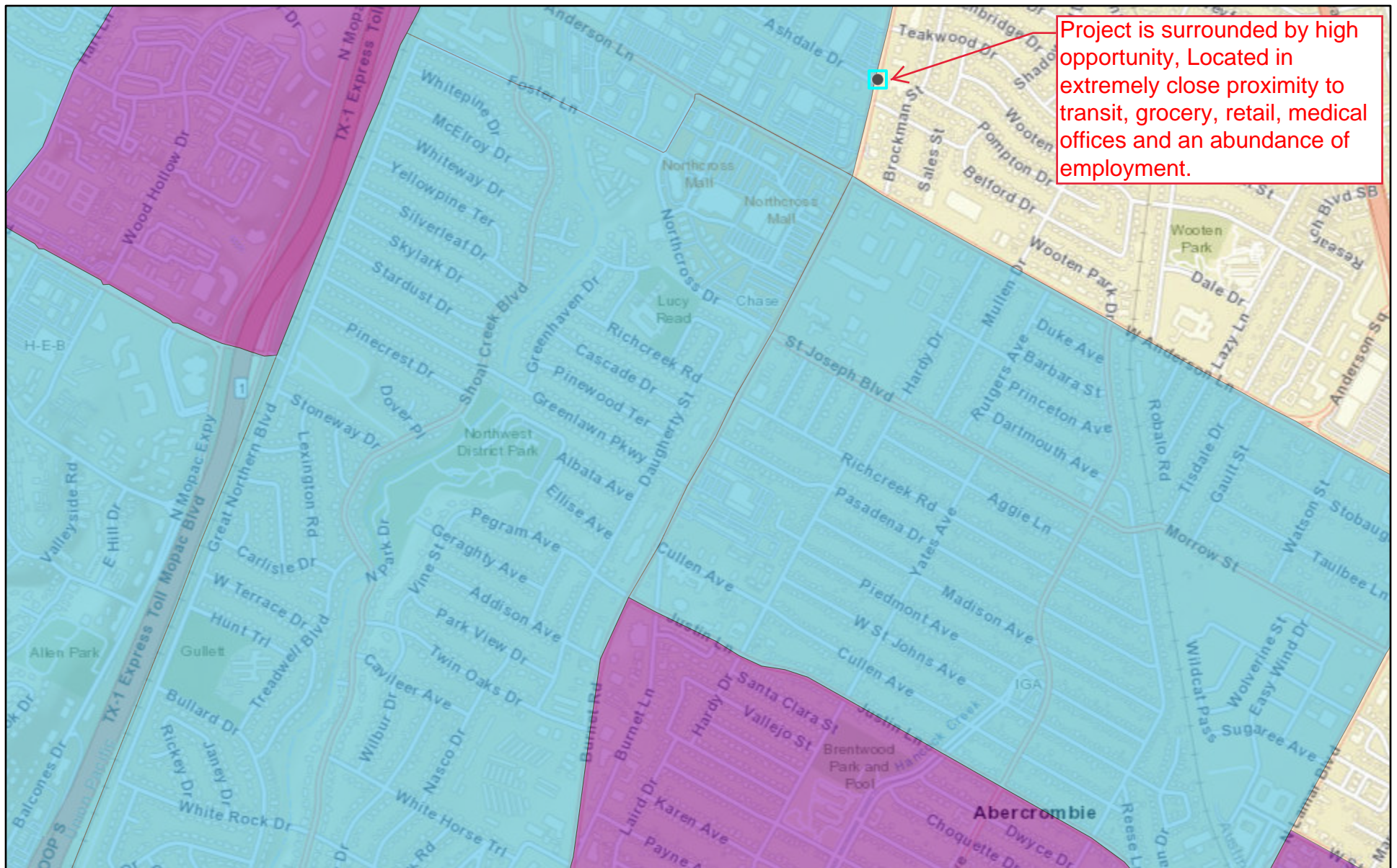
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Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,

Web AppBuilder for ArcGIS
Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS |

Burnet Place Apartments - 8007 Burnet Road, Austin, TX 78757

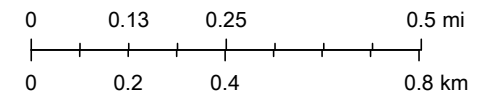


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 High Opportunity

 Emerging Opportunity

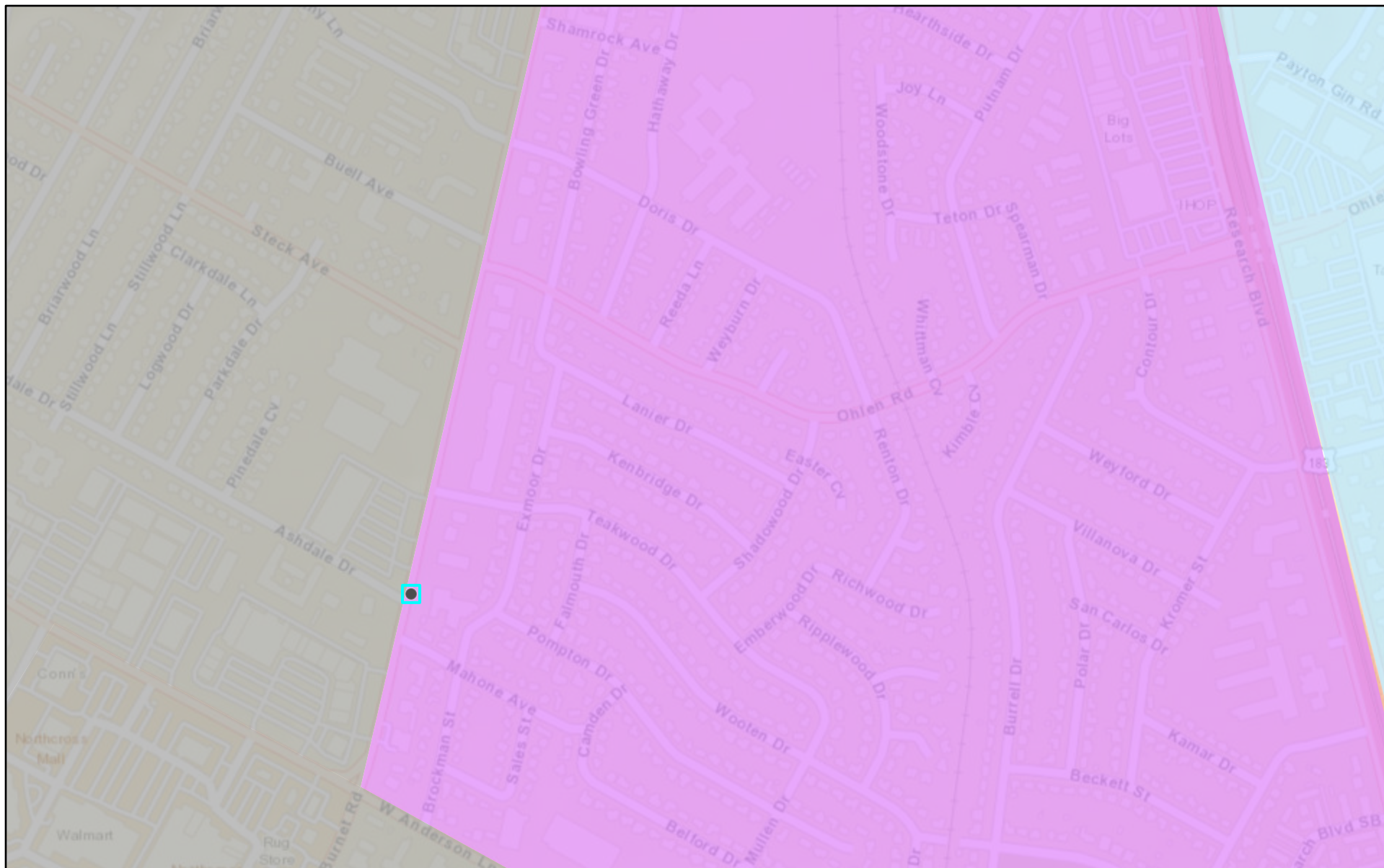
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Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,

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Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS |

Burnet Place Apartments - 8007 Burnet Road, Austin, TX 78757



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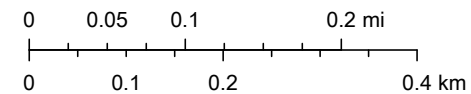
Gentrification_RHDAHODA_view

Early: Type 1

 Susceptible

 Not Gentrifying

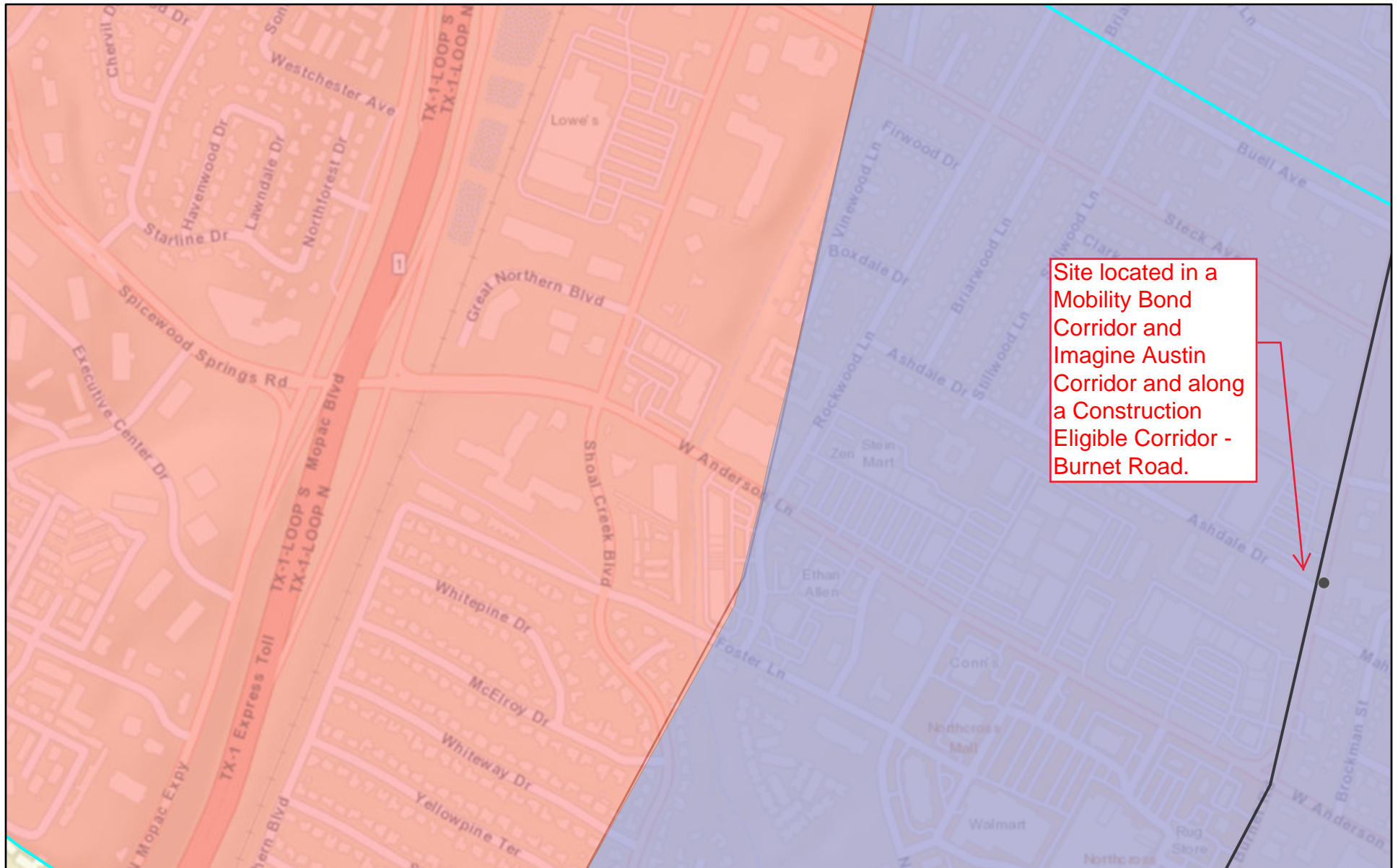
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Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,

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Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS |

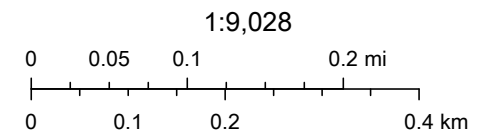
Burnet Place Apartments - 8007 Burnet Road, Austin, TX 78757



4/25/2019, 4:01:51 PM

2016 Mobility Bond Corridor Projects

	Mobility Bond Corridor: 1/2-Mile Buffer
	Construction Eligible Corridor
	Imagine Austin Corridor: 1/2-Mile Buffer

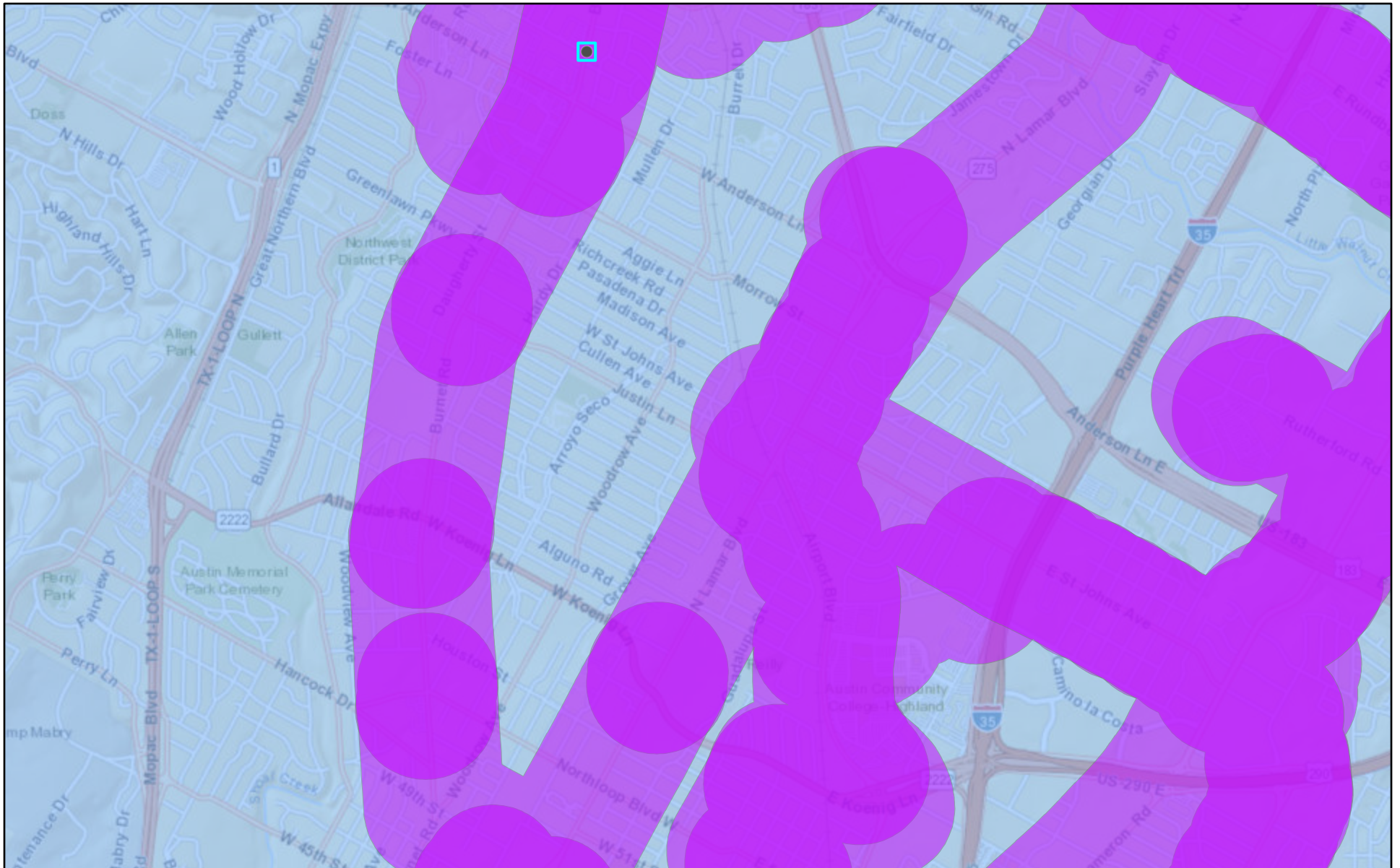


Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,




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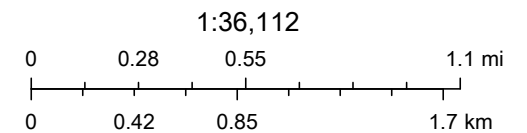
Austin Community College, Esri, HERE, Garmin, INCREMENT P, NG, USGS | City of Austin Planning and Development Review Department |

Burnet Place Apartments Transit



4/25/2019, 10:10:04 AM

-  High Frequency Bus Routes: 1/4-Mile Buffer
-  Bus Routes: 3/4-Mile Buffer
-  High Frequency Bus Stops: 1/4-Mile Buffer



Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,

Web AppBuilder for ArcGIS
Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS |

Burnet Place Apartments - 8007 Burnet Road, Austin, TX

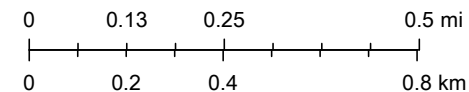


4/25/2019, 4:12:18 PM

 Healthy Food

 Healthy Food Retail Locations

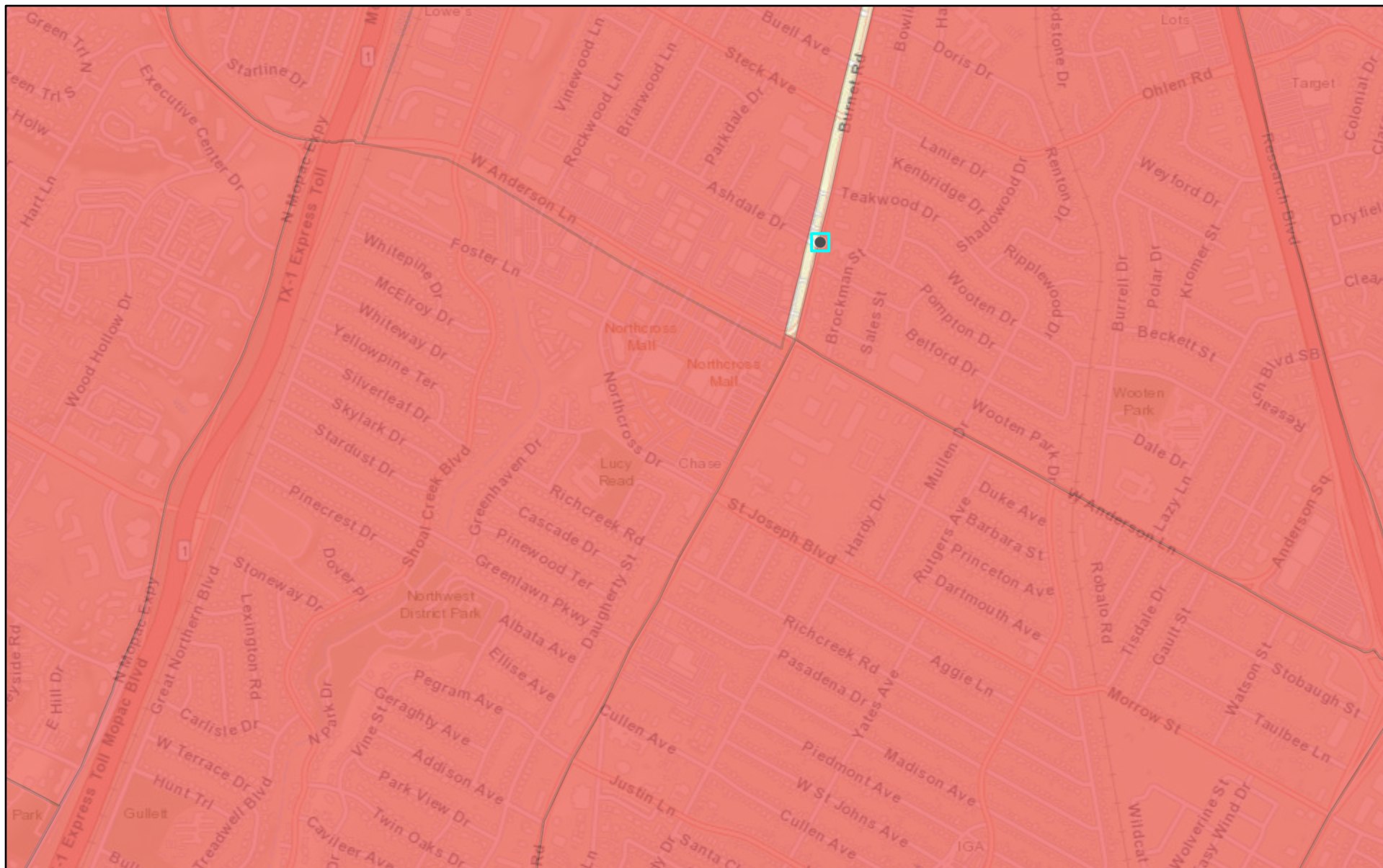
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Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,

Web AppBuilder for ArcGIS
Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS |

Burnet Place Apartments - 8007 Burnet Road, Austin, TX 78757

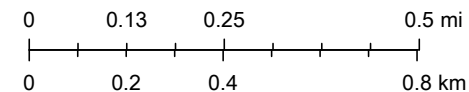


4/25/2019, 4:14:00 PM

Austin Elementary School Attendance Areas

Austin ISD

1:18,056



Sources: Esri, HERE, Garmin, USGS, Intermap, INCREMENT P, NRCan,

Web AppBuilder for ArcGIS
Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS |



ATTACHMENT 5: PROPERTY

b. Appraisal:

Please find attached a current TCAD tax assessment for the property which lists a market value of \$3,352,000. The site is under contract for \$2.9M.

Travis CAD

Property Search > 242406 8007 BURNET HOLDINGS LLC for Year 2019

Tax Year: 2019

Property

Account

Property ID:	242406	Legal Description:	LOT 7 BLK H ALLANDALE NORTH SEC 8
Geographic ID:	0239061008	Zoning:	CS1; GR
Type:	Real	Agent Code:	
Property Use Code:			
Property Use Description:			

Protest

Protest Status:
Informal Date:
Formal Date:

Location

Address:	8007 BURNET RD TX 78757	Mapsco:	
Neighborhood:	ALT LIVING CENTERS	Map ID:	023401
Neighborhood CD:	89ALC		

Owner

Name:	8007 BURNET HOLDINGS LLC	Owner ID:	1651394
Mailing Address:	47 ZATIZ FARM RD PRINCETON JUNCTION , NJ 08550-3314	% Ownership:	100.000000000000%
		Exemptions:	

Values

(+) Improvement Homesite Value:	+	\$0	
(+) Improvement Non-Homesite Value:	+	\$16,136	
(+) Land Homesite Value:	+	\$0	
(+) Land Non-Homesite Value:	+	\$3,336,200	Ag / Timber Use Value
(+) Agricultural Market Valuation:	+	\$0	\$0
(+) Timber Market Valuation:	+	\$0	\$0

(=) Market Value:	=	\$3,352,336	
(-) Ag or Timber Use Value Reduction:	-	\$0	

(=) Appraised Value:	=	\$3,352,336	
(-) HS Cap:	-	\$0	

(=) Assessed Value:	=	\$3,352,336	

Taxing Jurisdiction

Owner: 8007 BURNET HOLDINGS LLC
% Ownership: 100.000000000000%
Total Value: \$3,352,336

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax		
01	AUSTIN ISD	1.192000	\$3,352,336	\$3,352,336	\$39,959.85		
02	CITY OF AUSTIN	0.440300	\$3,352,336	\$3,352,336	\$14,760.34		
03	TRAVIS COUNTY	0.354200	\$3,352,336	\$3,352,336	\$11,873.97		
0A	TRAVIS CENTRAL APP DIST	0.000000	\$3,352,336	\$3,352,336	\$0.00		
2J	TRAVIS COUNTY HEALTHCARE DISTRICT	0.105221	\$3,352,336	\$3,352,336	\$3,527.36		
68	AUSTIN COMM COLL DIST	0.104800	\$3,352,336	\$3,352,336	\$3,513.25		
Total Tax Rate:		2.196521					
Taxes w/Current Exemptions:					\$73,634.77		
Taxes w/o Exemptions:					\$73,634.76		

Improvement / Building

Improvement #1: ALT LIVING CTR State Code: F1 Living Area: 20062.0 sqft Value: \$16,136

Type	Description	Class CD	Exterior Wall	Year Built	SQFT
1ST	1st Floor	WV - 4		1966	20062.0
011	PORCH OPEN 1ST F	* - 4		1966	971.0
011	PORCH OPEN 1ST F	* - 2+		1966	44.0
491	SPRINKLER HEADS	* - *		1966	20062.0
531	OBS FENCE	CAL - *		1966	1.0
551	PAVED AREA	AA - *		1966	8000.0
581	STORAGE ATT	WW - 3+		1966	119.0
581	STORAGE ATT	WW - 3-		1966	1377.0
SO	Sketch Only	SO - *			60.0
SO	Sketch Only	SO - *			132.0
SO	Sketch Only	SO - *			147.0
SO	Sketch Only	SO - *			10.0
SO	Sketch Only	SO - *			586.0
SO	Sketch Only	SO - *			702.0
SO	Sketch Only	SO - *			675.0
SO	Sketch Only	SO - *			36.0

Land

#	Type	Description	Acres	Sqft	Eff Front	Eff Depth	Market Value	Prod. Value
1	LAND	Land	1.0941	47660.00	0.00	0.00	\$3,336,200	\$0

Roll Value History

Year	Improvements	Land Market	Ag Valuation	Appraised	HS Cap	Assessed
2019	\$16,136	\$3,336,200	0	3,352,336	\$0	\$3,352,336
2018	\$1,000	\$2,621,300	0	2,622,300	\$0	\$2,622,300
2017	\$16,069	\$2,383,000	0	2,399,069	\$0	\$2,399,069
2016	\$143,600	\$1,906,400	0	2,050,000	\$0	\$2,050,000
2015	\$622,817	\$1,191,500	0	1,814,317	\$0	\$1,814,317
2014	\$608,500	\$1,191,500	0	1,800,000	\$0	\$1,800,000

Deed History - (Last 3 Deed Transactions)

#	Deed Date	Type	Description	Grantor	Grantee	Volume	Page	Deed Number
1	7/7/2015	SW	SPECIAL WARRANTY DEED	BR-T PROPERTIES L P	8007 BURNET HOLDINGS LLC			2015108208

2	1/1/2004	AD	ASSUMPTION DEED	NOBLE RICHARD G	BR-T PROPERTIES L P	00000	00000	2004059065TR
3	10/10/2003	SW	SPECIAL WARRANTY DEED	OYSTER INVESTMENT CORPORATION	NOBLE RICHARD G	00000	00000	2003247566TR

Questions Please Call (512) 834-9317

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Website version: 1.2.2.30

Database last updated on: 4/25/2019 1:56 AM

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ATTACHMENT 5: PROPERTY

c. Zoning:

Currently the property is zoned on the west side of the property GR-MU-NP, Community Commercial, Mixed Use, in a Neighborhood Plan, and on the east side of the property SF-3-NP, Single family residence, moderate density, in a neighborhood plan. A zoning map has been included.

GR-MU

This western side of the site (0.73ac per Ordinance No. 040401-32A) is zoned GR-MU which allows a substantial number of commercial uses as well as residential uses and is generally located along major roads. GR zoning allows 90% impervious cover, 75% building coverage, and 60-foot height, unless modified by compatibility requirements.

We will be razing the portion of the building in the front and proceeding with new construction within the zoning classification regulations for development.

SF-3

The eastern side of the site, the remaining 0.36ac facing Brockman Street, is zoned SF-3. SF-3 zoning is primarily used for single-family residential neighborhoods with a few other types of land uses permitted.

SF-3 zoning allows 45% impervious cover, 40% building coverage, and 35-foot height limits.

Compatibility requirements are triggered by SF-3 properties, or by uses which are permitted in SF-3 zoning. Since the SF-3 zoning on this site is part of the same ownership and same proposal as the GR-MU zoning, it will not trigger compatibility height limits or setback on the project, but the adjacent SF-3 properties will trigger compatibility requirements on any new construction.

Our team is confirming that redevelopment of the existing building could probably qualify for legal status with other similar uses and minimal additions or changes in the SF-3 portion of the site vs. razing the building in the SF-3 portion which we do not believe is an option. We plan to encapsulate this portion of the building and rehab the interior into the allowed number of residential units.

Affordability Unlocked

This project is eagerly awaiting the passage of Affordability Unlocked as it would have a major impact on the development potential of the site.

1. Depending on proposed use, the maximum units could increase from 12 units on the SF-3 side to 18 units.
2. In GR-MU the maximum number of units would be calculated by dividing the square footage of the property (by 800, 1000, or 1200, depending on proposed unit size) and then multiplying by 1.5. This would yield 60 units.

Total of 78 units vs. 55 units.

We are bringing an architect on the team who will be able to do some massing studies. We predict that Impervious Coverage limits will likely kick in before we can get to the full 78 units, but we do think it will open up a significant addition of units. If this route is pursued, the team will immediately notify NHCD and amendments to application can be made as necessary.



ATTACHMENT 5: PROPERTY

d. Site Control:

Please find attached evidence of site control and current tax documentation substantiating the value of the property. Please also see provided TCAD documentation with year structure built indicated.

Travis CAD

Property Search > 242406 8007 BURNET HOLDINGS LLC for Year 2019

Tax Year: 2019

Property

Account

Property ID:	242406	Legal Description:	LOT 7 BLK H ALLANDALE NORTH SEC 8
Geographic ID:	0239061008	Zoning:	CS1; GR
Type:	Real	Agent Code:	
Property Use Code:			
Property Use Description:			

Protest

Protest Status:
Informal Date:
Formal Date:

Location

Address:	8007 BURNET RD TX 78757	Mapsco:	
Neighborhood:	ALT LIVING CENTERS	Map ID:	023401
Neighborhood CD:	89ALC		

Owner

Name:	8007 BURNET HOLDINGS LLC	Owner ID:	1651394
Mailing Address:	47 ZATIZ FARM RD PRINCETON JUNCTION , NJ 08550-3314	% Ownership:	100.000000000000%
		Exemptions:	

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(=) Market Value:	=	\$3,352,336	
(-) Ag or Timber Use Value Reduction:	-	\$0	

(=) Appraised Value:	=	\$3,352,336	
(-) HS Cap:	-	\$0	

(=) Assessed Value:	=	\$3,352,336	

Taxing Jurisdiction

Owner: 8007 BURNET HOLDINGS LLC
% Ownership: 100.000000000000%
Total Value: \$3,352,336

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SO	Sketch Only	SO - *			586.0
SO	Sketch Only	SO - *			702.0
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Questions Please Call (512) 834-9317

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ATTACHMENT 5: PROPERTY

e. Phase I Environmental Assessment:

A Phase I ESA has been ordered for the site of Burnet Place Apartments and is being coordinated through the City of Austin's Austin Resource Recovery Department. The site visit for the Phase I and the Asbestos sampling is May 7, 2019. Once completed, a copy of the Phase I ESA will be provided to NHCD.



ATTACHMENT 5: PROPERTY

f. State Historical Preservation Officer Consultation:

The original building on the proposed site of Burnet Place Apartments was built in 1966, which may qualify it for SHPO consultation at the discretion of City staff.