RENTAL HOUSING DEVELOPMENT ASSISTANCE (RHDA)

Application for Rental Development Financing

PLEASE NOTE: AHFC Reserves the right to fund projects at a lower amount than requested, and the right to deny applications that do not coincide with the City's FY 2013-14 Action Plan goals and policy direction from the Austin City Council.

Project Name: **Live Oak Trails (previously known as Southwest Trails Phase II)**

Project Address: **8500 Highway 71, Austin, TX** Zip Code: **78735**

Total # units in project/property: **58** Census Tract Number: **19.08**

Total # units to be assisted with RHDA Funding: **58**

Project type (check all that apply with an '**X**'):

[X] Acquisition [ ] Rehabilitation [X] New construction [ ] Refinance [ ] Rent Buy-Down

Amount of funds requested: **$500,000** Terms Requested: **Deferred forgivable with 40 plus yr term**

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

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

Foundation Communities, Inc.
Name

[X] **Developer** [ ] **Consultant/Other**
Applicant is (please check appropriate box):

3036 S. 1st Street
Street Address

Austin
City

Texas, 78704
State, Zip

(512) 447-2026
Telephone

Jennifer Hicks
Contact Person

(512) 610-4025
Contact Telephone

jennifer.hicks@foundcom.org
E-mail address

[redacted]
Federal Tax ID Number

556352268
D-U-N-S Number (REQUIRED - Visit www.dnb.com for free DUNS#)

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

Foundation Communities, Inc.
Legal Name of Developer/Entity

Signature of Authorized Officer

City of Austin
SEP 16 2014
NHCD / AHFC

Executive Director
Title

9-16-2014
Date

CONSIDER SMOKE-FREE HOUSING

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

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

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

Please answer the following questions.

Is this development intended to have restrictions on smoking? X Yes ___No

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

___ No smoking anywhere on the property, inside or outside

X No smoking Inside residents' units

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

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

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

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

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

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

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

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

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

A. Numbers of proposed PSH Units:

58____ Total Number of Units in project
12____ Total Number of Permanent Supportive Housing (PSH) Units Proposed

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

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

NUMBER OF UNITS _____

Individuals or families headed by individuals that are:

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

NUMBER OF UNITS _____

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

NUMBER OF UNITS _____

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

a. have experienced a long-term period without living independently in permanent housing;
b. have experienced persistent instability as measured by frequent moves over such period; and
c. can be expected to continue in such status for an extended period of time because of chronic disabilities, chronic physical health or mental health conditions, substance addiction, histories of domestic violence or childhood abuse, the presence of a child or youth with a disability, or multiple barriers to employment.

NUMBER OF UNITS 12 UNITS RESERVED

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

NUMBER OF UNITS _____

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

NUMBER OF UNITS _____

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

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

Foundation Communities is applying for additional funding from the City of Austin in the amount of **$500,000** for the new construction of Live Oak Trails (formerly known as Southwest Trails Phase II) – 58 units of supportive housing for families located at 8500 W. Highway 71 in the high opportunity area of Oak Hill. The proposed project will be located adjacent to Southwest Trails apartments – 160 units of family rental housing developed by Foundation Communities in 2000 that was the first affordable housing community developed West of Mopac.

The $500,000 will be the second request in City funding for the Live Oak Trails project. The project was originally awarded $1,250,000 in February 2014 as leverage for the 2014 Low Income Housing Tax Credit Application. The City's critical leverage enabled Live Oak Trails to receive an award of the highly competitive 9% credits. After the 9% credit award, the $1,250,000 was approved by City Council on August 7, 2014 and was utilized to acquire the site of Live Oak Trails site on August 13, 2014.

As with many of our previous awards, Foundation Communities waits until the award of tax credits is final before coming back to the City for an additional ask. The project is farther along now – with the site plan and design almost complete – and construction costs can be better estimated. The latest development budget has hard construction costs that are based on construction bids from our Homestead Oaks project in June 2014. Construction costs in Austin only seem to be rising.

This $500,000 request brings the total AHFC funds invested in Live Oak Trails to $1,750,000 or $30k per unit. This amount is within range of the AHFC funding committed on our Skyline Terrace and Capital Studios supportive housing communities. As supportive housing with no third party debt, the City of Austin's funding contribution is a critical layer to the overall project funding stack.

With this request, Foundation Communities has also increased the number of units set aside for homeless families meeting the City's definition. With our first request, we set aside 3 units. **With this second request, we will increase the amount of units set aside for homeless families meeting the City's definition to 12 units.** Currently, 10% of all of our affordable housing units located in Austin are set aside for families who meet the City's definition family homelessness as part of Foundation Communities' Children's HOME Initiative program.

Live Oak Trails has made significant progress since our first application for City funding in January 2014. We secured an extremely competitive allocation of Low Income Housing Tax Credits that will bring over $9 million in equity to the project. A Request for Proposals of tax credit equity was due back to Foundation Communities on Sept. 12th and an equity investor will be selected soon after. Foundation Communities has launched a capital campaign to help cover the fundraising gap on all three projects with some very promising donor prospects. Design is currently underway for the project with plans to submit site plan in November 2014 and building plans in January 2015.

Foundation Communities wanted to review the unique aspects of Live Oak Trails that garner the City's support of additional funding:

1) Prime location in high opportunity area of Oak Hill with high-performing schools.

2) Foundation Communities' first property that will be entirely family supportive housing. Families from FC's Children's HOME Initiative will be able to transition in place creating further stability in their lives. The Children's HOME Initiative program is an 18 month transitional housing program that provides a very low rent to families in exchange for participation in an intensive supportive service program. Once families complete the program, they will be able to transition in place to a unit with a higher rent and keep all their ties to the community.
3) 58 apartments for families in the range of $261 to $703.
4) All units for persons with incomes below 50% Median Family Income.
5) 12 units for families who are homeless and participating in FC's Children's HOME Initiative Program.
6) Targeted supportive services available to all residents free-of-charge including case management, benefits assistance, healthcare screening and management, budgeting and money management classes, life skills training and health and wellness activities.
7) Goal of achieving LEED platinum green construction.

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

The target population of Live Oak Trails is families with children. 20% of the property (12 units) will be reserved for homeless families as part of FC's transitional supportive housing program – the Children's HOME Initiative program. Live Oak Trails will have 6 units (10% of the property) that are accessible to persons with Mobility Impairments using Section 504 and Fair Housing Accessibility as guidelines. In addition, all ground floor units will be made adaptable to persons with mobility disabilities. The property will also have 2 units (2% of the property) that are accessible for persons with hearing and/or visual disabilities.

Of the 58 units, 20% will be for residents with approximate incomes less than 30% of the Area's Median Family Income (AMFI), 20% will be for residents with approximate incomes of less than 40% of the AMFI, and 60% will be for residents with approximate incomes of less than 50% of the AMFI.

FC started the Children's HOME Initiative (CHI) in 2003 in response to the growing rates of poverty and homelessness in Austin among families with children. The CHI program helps homeless families transition to stable housing and addresses the underlying issues surrounding homelessness that many Austin area children struggle with daily. The CHI program addresses housing stability and breaks the cycle of poverty and homelessness. CHI helps formerly homeless participants create opportunities for all members of the family; develop money management skills and improve financial stability; and engage children in youth development activities and promote their emotional well-being. This eighteen month program provides a stable roof overhead, parenting and money management classes, and employment resources. While living in an attractive, well-maintained, family-oriented community is a first step, it is the year and a half of intensive case management support that empowers CHI participants to make the lasting changes in their lives that will lead to long-term stability. Working closely with a case manager, CHI families face the underlying issues that contributed to their poverty. Case managers meet weekly with families to help them evaluate their situations, establish realistic and attainable goals, and develop road maps toward self-sufficiency. Money management, job skills, employment, childcare, health insurance, debt, and long-term housing are among the issues addressed. FC currently has 103 CHI units spread out over 6 properties. Live Oak Trails would add 12 more units to the program.

The menu of services that we plan to make available to residents at Live Oak Trails include:

- Afterschool Program – Children living at Live Oak Trails will be able to attend the after-school program in the on-site community learning center located at Southwest Trails.
- Adult Classes including English as a Second Language, Money Management, Homebuyer Education and Computer Training will be offered on-site in the Community Learning Center at Southwest Trails.
- Off-Site services to be provided by Foundation Communities include: Financial Education, Financial Coaching, Matched Savings Accounts, College Savings and Financial Assistance, Free Tax Preparation.

The Children's HOME Initiative program typically offers the following menu of services:

- Computer training
- Intensive Case Management
- Individualized Family Support
- Crisis Management

- Financial Literacy
- Debt Management
- Children's Advocacy
- Educational Support
- Career Awareness & Enrichment
- Long-term Goal Development
- Resource Brokering

Please see Section 15(a) for a more detailed explanation of services available to residents living at Live Oak Trails.

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

Live Oak Trails will be a 58-unit, multi-family, supportive housing community for families. Live Oak Trails will access the existing leasing office and learning center located at Southwest Trails, which allows the site to focus its acreage on the delivery of units.

The unit mix for the property is as follows:

Unit Type	**# of Units**	**Square Footage**
1 bedroom/1 bath	12	705 sq. ft.
2 bedroom/2 bath	30	1,052 sq. ft.
3 bedroom/3 bath	18	1,238 sq. ft.
TOTAL Rentable Square Feet		60,014 sq ft
TOTAL Common Area (leasing & service)		1,683
TOTAL Square Feet		**61,697**

c. Occupation: Live Oak Trails is new construction and therefore is not occupied.

d. VMU, TOD, PUD or .25 mile from transit stop: Live Oak Trails is currently a PUD. The location is not VMU or TOD. Live Oak Trails is located only 385 feet (less than 1/10 mile) from a bus stop.

e. Preservation: Live Oak Trails is new construction and therefore will be adding 58 new units to Austin's affordable housing stock and providing 58 new homes for families in need of supportive housing.

f. Existing Structure: Live Oak Trails is new construction therefore this section is not applicable.

g. Section 8: Live Oak Trails will not be reserving units for Section 8 voucher holders. Instead, vouchers will be accepted at our property.

h. 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) will be designed for persons with Mobility Impairments using Section 504 and Fair Housing Accessibility as guidelines. In addition, at a minimum, 2% of total units (2) will be made accessible for persons with hearing and visual impairments.

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

Live Oak Trails is located in the Oak Hill Combined Neighborhood Plan. Balancing development and environmental protection is a key goal in the Oak Hill Combined Neighborhood Plan. The design and construction of Live Oak Trails will not only address the impact on the Edwards Aquifer, but also pay specific attention to the surrounding trees and natural landscape. Live Oak Trails intends to keep much of the existing natural landscape and only include native and adaptive plants in the landscape design. Live Oak Trails will also adhere to the standards of the Austin Green Building Program. In the past we have employed green building practices such as solar panels, rainwater collection systems, water quality controls and recycled materials at projects such as M Station and Arbor Terrace.

As existing members of the neighborhood for the past 10 years, Foundation Communities is engaged in the community and supported by fellow community members. Our learning center at Southwest Trails provides afterschool and summer programming for children in kindergarten through sixth grade.

Additionally, Live Oak Trails will adhere to the neighborhood design guidelines for density and architectural building materials in keeping with the Oak Hill "hill country" look.

Although increasing affordability is not a key goal of the Oak Hill combined Neighborhood Plan, the community acknowledges the core value of providing affordable housing. Live Oak Trails would provide an additional 58 units to the area for families making below 50% of the Austin AMFI.

Please see **ATTACHMENT 5** for key sections of the plan addressing the factors listed above.

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

The total cost to construct the 58-unit Live Oak Trails is $12,069,921. The sources of funds for this project include:

City of Austin, in the total amount of $1,250,000 in the first application and $500,000 in this second application. The first $1,250,000 was already utilized to acquire the land on August 13, 2014. The second request of $500,000 will be used for construction hard costs; although $450,000 of the funds could be used toward acquisition to pay off Foundation Communities' bridge loan that covered the gap between the initial $1,250,000 from AHFC and the acquisition price of $1,700,000. Since this project is serving a population that can only afford to pay a minimal amount in monthly rent, the project will only be feasible if there is no debt service to repay. We request these funds from the City to be in the form of a deferred forgivable loan with a loan term of at least 40 years.

TDHCA Low Income Housing Tax Credits (LIHTC), in the amount of approximately $9,179,082 ($900,000 annual allocation). The 9% tax credits can be put toward any development cost for the project. Live Oak Trails received an award of 9% LIHTCs on July 31, 2014. We will finalize our equity investor by October 1, 2014.

Federal Home Loan Bank grant in the amount of $500,000. Foundation Communities will apply in March 2015. Foundation Communities has received 11 previous FHLB grants and feel chances are very strong for an award for Live Oak Trails. If a project is not successful the first round, you may resubmit the following year which will still be in the acceptable application threshold for Live Oak Trails.

Owner Equity in the amount of $42,950. Foundation Communities will commit $42,950 of its own funding to Live Oak Trails as a placeholder for private fundraising that will be pursued during the development of the project. We plan to reach out to private foundations and corporations to fund this amount and have a stellar track record of filling the gap on each project we complete.

Deferred Developer Fee in the amount of $597,889 which can be paid back by property cash flow within 15 years (as required by tax credit investor.)

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

k. A map (8 ½" x 11") indicating the property location and the distance to the nearest Capital Metro Transit Stop to which residents will have access.

Please see **ATTACHMENT 6** for a map of the property location and distance to nearest Capital Metro Transit Stop.

5. Site Control and Demonstration of Value

Foundation Communities, Inc. acquired Live Oak Trails on August 13, 2014. Please see **ATTACHMENT 7: Warranty Deed** and **ATTACHMENT 8: Current Tax Documentation**.

6. Zoning

The zoning for Live Oak Trails was changed as an amendment to an existing PUD. Please see **ATTACHMENT 9: Zoning** for the ordinance approved by Austin City Council on June 12, 2014 allowing for multifamily use in the PUD.

7. S.M.A.R.T. Housing™. Please see **ATTACHMENT 10** for SMART Housing certification letter.

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

NOTE: The development team for Live Oak Trails has not, yet, been completely assembled. Foundation Communities always promotes the inclusion of MBE/WBE businesses as part of our development team.

	Name and Contact Information	**MBE? (Mark X if Yes)**	**WBE? (Mark X if Yes)**	**Non-profit? (Mark X if Yes)**
Owner	FC Southwest Trails Housing, LP, 3036 S. 1st Street, Austin, TX 78704			
Developer	Foundation Communities, Inc., 3036 S. 1st Street, Austin, TX 78704			
Architect	Austin Community Design and Development Center, Michael Gatto, 2108 E M Franklin Ave., Austin, TX 78723			X
Engineer	Doucet and Associates, 7401 Texas 71, Austin, TX 78735			
Construction Lender	TBD by October 1, 2014			
Other Lenders	TBD by October 1, 2014			
Attorney	Rick Hightower, 5901 Old Fredericksburg Road A-103Austin, Texas 78749			
Accountant	Ann Clift, CFO, Foundation Communities, Inc., 3036 S. 1st Street, Austin, TX 78704			
General Contractor	Rizzo Construction, 1715 S Capital of Texas Hwy, #101, Austin, TX 78746			
Consultant (if Applicable)	N/A			
Property Management Provider	Foundation Communities, Inc., 3036 S. 1st Street, Austin, TX 78704			X
Supportive Service Provider	Foundation Communities, Inc., 3036 S. 1st Street, Austin, TX 78704			X

Foundation Communities has 20 years of experience contracting for and overseeing the construction and rehabilitation of affordable housing. As the owner and manager of 14 affordable housing properties (1,982 units) in Austin and 3 affordable housing properties (691 units) in North Texas, Foundation Communities has built a strong development team and has worked together on many projects. Three of our existing communities were new construction projects financed with tax credits with two additional communities (275 units) currently in design and construction. Fourteen of our communities were purchased as existing properties and greatly improved with renovations, green spaces and playscapes, learning centers, landscaping, signage, lighting and green building features (solar panels and rain water harvesting). Four properties are single room occupancy permanent supportive housing, two properties are duplexes and the remaining 11 properties are multifamily properties.

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

Walter Moreau is FC's Executive Director. During his 20-year career, Moreau has secured subsidy financing of more than $100 million to create more than 2,400 units of service-enriched, nonprofit-owned affordable housing. Moreau was recognized as a 2007 James A. Johnson Community Fellow by the Fannie Mae Foundation. He was also awarded the 2005 Social Entrepreneur of the Year Award and the 2004 Texas Houser

Award. He holds a Master's degree from UT's LBJ School of Public Affairs. He has been with Foundation Communities for 19 years.

Sunshine Mathon, Design and Development Director, assists in the programming, design and construction management of all development projects. He has a focus on green building and sustainability issues, such as energy and water conservation, use of recycled content materials and indoor environmental quality. Sunshine is the project manager for Capital Studios (under construction), Homestead Apartments (in bidding) and the recently completed Arbor Terrace and M Station. Sunshine coordinates the RFQ and bid process for architect, engineer and general contractor and is the direct link between the third party design and construction professionals and FC's Development team. FC has had the privilege of working with a number of quality general contractors and invites those firms to bid on all projects developed by Foundation Communities (in addition, to other firms that might be interested.)

Vicki McDonald, Asset Manager, oversees the income and assets of the FC portfolio. She has over 30 years of experience in owning and managing multifamily, office and retail developments. For 25 years, she owned and operated Vista Properties, a real estate firm specializing in the management, leasing and brokerage of income producing assets. Vicki is the link between the development team and property management as well as filling in on project management as the pipeline demands.

Jennifer Hicks, Director of Housing Finance, pursues new development opportunities and identifies and packages subsidy and conventional financing for multi-family housing. Packaging includes running project proformas, applying for the funding, bidding out equity/mortgages, coordinating closings, and ensuring compliance with construction-related funding provisions. Jennifer also coordinates due diligence reports such as the Phase I ESA, appraisal, market studies, property condition reports, and surveys. Over the past 10 years, Jennifer has secured grants and loans from public and private sources totaling $120 million for the acquisition and rehabilitation of eight communities (1,128 units) and two learning centers.

John Guttman, Real Estate Project Manager, underwrites all new development proposals and manages initial site analysis and due diligence. John also assists the Director of Housing Finance with all phases of each capital funding stack including preparation of funding applications (including LIHTC applications), solicitation of mortgage and equity financing and coordination of financing closings. John has extensive experience in financial modeling and site investigation.

Aubrie Christensen, Development Project Manager, assists the Design and Development Director with the programming, design and construction management of development projects. Aubrie joined Foundation Communities in summer 2014 in order to add development capacity. Aubrie is a graduate of the University of Texas School of Architecture and has a passion and interest in sustainability.

Please see **ATTACHMENT 11** for a Development Resume for Foundation Communities, Inc.

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

a. **project management:** Sunshine Mathon was the Project Manager of M Station and Arbor Terrace, as well as for Capital Studios and Homestead Oaks (now underway.) Sunshine coordinates the RFQ and bid process for architect, engineer and general contractor. He is also acts as the direct link between the third party design and construction professionals and FC's development team. Jennifer Hicks has packaged the financing for all developments by Foundation Communities the last 10 years. The packaging includes running project proformas, applying for the funding, bidding out equity/mortgages, coordinating closings, and ensuring compliance with construction-related funding provisions. John Guttman coordinates due diligence reports such as the Phase I ESA, appraisal, market studies, property condition reports, and surveys.

b. **market analysis:** Foundation Communities typically engages a third party firm to conduct market studies for each of our proposed projects. The market study is ordered in the contract feasibility period. Jennifer Hicks receives bids and engages each project's market analyst.

c. **site selection and control:** Walter Moreau has 20 years of site selection experience. Sites are selected based on a variety of factors including current funding priorities, availability of low-cost land, preservation of affordable housing opportunities and availability of sites in close proximity to existing FC properties. Vicki McDonald is a licensed real estate broker and is involved in all real estate contract negotiations. Jennifer Hicks works with the title company to ensure all requirements are met on the buyer side and oversees the closing on behalf of Foundation Communities.

d. **planning and construction**: Sunshine Mathon has structured the professional development team and overseen the planning and construction for FC's last three projects. Foundation Communities contracts with third-party General Contractors. FC has had the privilege of working with a number of quality general contractors and invites those firms to bid on all projects developed by Foundation Communities (in addition, to other firms who might be interested.)

e. **design, architecture and engineering:** Sunshine Mathon also oversees the hiring of the design and engineering team. Typically, Sunshine issues an RFQ to an invited list of bidders (open to all interested parties.) The list is narrowed down based on responses and then the FC development team including Walter, Vicki, Jennifer and Sunshine meet the finalists and make a selection based on presentations.

f. **legal and accounting:** Rick Hightower has been the general counsel for Foundation Communities for the past 15+ years and handles most real estate transactions. Foundation Communities has historically worked with Kutak Rock as a tax credit counsel on LIHTC projects. All accounting is performed in-house by an accounting team led by Ann Clift, CFO. Tax returns, audits and cost certifications for tax credit properties are contracted out to Novogradac and Company, LLC.

g. **federal funding rules:** Foundation Communities has extensive experience working with programs funded by HUD and their associated federal regulations including: Federal Labor Standards, Davis Bacon Reporting, Section 3, Affirmative Marketing, Environmental Clearances, Public Notices and Procurement Standards. Please see **ATTACHMENT 11** for the Foundation Communities Development Resume.

h. **other funding source rules (e.g. Low Income Housing Tax Credits):**
Please see the FC Development Resume as **ATTACHMENT 11** for a list of properties and the funding sources in place at each property. Also, please see Question 11 for more detailed information on Financing Experience.

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

	DATE(S)
Acquisition and/or holding	**August 2014**
Environmental and/or historic review (AHFC)	**July-October 2014**
Securing and packaging project financing	**July-December 2014**
Construction Specifications and Cost estimates	**December 2014 – February 2015**
Construction Bids	**July 2015**
Construction Start	**September 2015**
Anticipated Draws (list all)	**October 2015** **November 2015**
End Construction	**October 2016**
Start of Rent-up	**August 2016**
Completion & Operation	**December 2016**

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

_____ Units adaptable for persons with mobility disabilities

6_____Units accessible for persons with mobility disabilities

_____ Units adaptable for persons with sight and hearing disabilities

2_____ Units accessible for persons with sight and hearing disabilities

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

Recent Development Experience: Live Oak Trails will draw upon the recently completed new construction of M Station Apartments, both Capital Studios and Homestead Oaks currently in development, as well as the completion

of four SRO housing communities. Please see **ATTACHMENT 11** for a description of these projects in the FC Development Resume.

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

LIHTCs and BONDS

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

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

City of Austin RHDA

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

FHLB AHP Program

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

Private Mortgages

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

Private Fundraising

Foundation Communities employs a diverse fundraising strategy. In 2013, private fundraising totaled over $3,000,000 (not including capital funding from City of Austin). Foundation and corporate grants range from $3,000 to hundreds of thousands of dollars, and fund both capital projects and FC's wide range of programs (education, supportive housing, etc.).

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

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

Please find in **ATTACHMENT 11** a list of the properties managed by Foundation Communities and the funding programs in place at the specific property. Live Oak Trails will share the Leasing Agent, Lead Maintenance, Assistant Maintenance and Learning Center Coordinator currently in place at Southwest Trails. This will save on the operational costs of the project allowing us to keep rents affordable. All family housing properties are overseen by Desiree Golden, Property Supervisor, who is overseen by Sandra Lumley, Property Director. Sandra has been with

Foundation Communities for 20 years and has extensive knowledge of all funding programs and required compliance.

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

DETAILED PROJECT BUDGET				
	Cost	**Prior award of RHDA Funds (if any)**	**RHDA Funds Requested**	**Description or Comments**
PREDEVELOPMENT				
Appraisal	6,000			
Environmental Review	10,000			
Soils Report	9,500			
Engineering	75,000			
Survey	12,000			
Civil Feasibility Report	3,500			
Market Study	7,200			
Architectural	206,160			
TOTAL PREDEVELOPMENT	**$329,360**			
ACQUISITION				
Site and/or Land	1,700,000			
Structures				
Other (specify) Closing Costs	10,000			
TOTAL ACQUISITION	**$1,710,000**	**$1,250,000**		
HARD COSTS				
Site work	1,021,438			
Demolition	0			
Concrete	303,671			
Masonry	21,005			
Woods and Plastics	1,127,663			
Finishes	964,425			
Waterproofing & Insulation	260,461			
Roofing & Sheet Metal	122,429			
Plumbing/Hot Water	449,505			
HVAC	514,920			
Electrical	701,564			
Doors/Windows/Glass	238,856			
Equipment	597,739			
Special Construction	169,239			
Specialties/Special Equipment	14,403			
Furnishings	21,006			
Accessory Structures	254,459			
General Requirements	406,967			
Contractor Profit/Fee	212,098			
Construction Contingency	359,487			
TOTAL CONSTRUCTION	**$7,761,335**		**$500,000**	
SOFT & CARRYING COSTS				
Legal	10,000			
Audit/Accounting	10,000			
Title/Recording	115,000			
Permit and Impact Fees	20,000			
Construction Interest	116,667			

Construction Loan Fees	40,000			
Construction Period Insurance	133,021			
Construction Period Taxes	45,626			
Green Consultant	67,000			
Tax Opinion	6,500			
P&P Bond	71,897			
Tax Credit Fees	38,334			
FFE (Units and Common Area)	75,000			
TOTAL SOFT & CARRYING COSTS	**$749,045**			
RESERVES & DEVELOPMENT FEE				
Operating & Lease-Up Reserves	300,000			
Development Fee	1,220,181			
TOTAL RESERVES & DEVELOPMENT FEE	**$1,520,181**			
TOTAL PROJECT BUDGET	**$12,069,921**	**$1,250,000**	**$500,000**	

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

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

TABLE A: SOURCES OF FUNDS SUMMARY					**Intended Use of Funds (Predevelopment, Acquisition, Construction, Soft Costs)**
	Term	Interest Rate	Amount	Evidence (Deed, Sales Contract)	
Owner Equity					
Owner Equity			$42,950	COMMITTED	Construction/hard/soft costs
Private Financing (List Lenders					
Low Income Housing Tax Credits			$9,179,082	COMMITTED	Construction/hard/soft costs
FHLB AHP Grant			$500,000	WILL APPLY	Construction/hard costs
Other Sources (List Below)					
Deferred Developer Fee			$597,889	COMMITTED	Construction/hard/soft costs
RHDA Funds – 1st Application			$1,250,000	COMMITTED	Used for acquisition
Proposed RHDA Funds	40 years	0%	$500,000	THIS APPLICATION	Acquisition/hard costs
TOTAL			**$12,069,921**		

TABLE B: USES OF FUNDS SUMMARY		
	Total Cost	Cost/Unit
Predevelopment	**$329,360**	**$5,679**
Acquisition	**$1,710,000**	**$29,483**
Hard Costs	**$7,761,335**	**$133,816**
Soft & Carrying Costs	**$2,269,226**	**$39,125**

TOTAL	**$12,069,921**	**$208,103**

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

TABLE C: PERCENTAGE OF RHDA FUNDS	
RHDA Funds	**$1,750,000**
Other Funds	**$10,319,921**
Total Project Cost	**$12,069,921**
RHDA Funds ÷ Total Project Cost=	**14.50%**

c. **Operating Proforma** – Please see **ATTACHMENT 16.**

14. Good Neighbor Policy. The completed Good Neighbor Checklist and related documentation are attached as **ATTACHMENT 12**. The Oak Hill Association of Neighborhoods (OHAN) voted to support the Live Oak Trails project. Their letter of support has also been included in this tab.

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

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

Foundation Communities will provide free, supportive service programs that will educate, support and improve financial standing for residents of Live Oak Trails. Supportive Service programs to be offered ON-SITE at community spaces located at Southwest Trails include:

Afterschool Program – Children living at Live Oak Trails will be able to attend the after-school program in the on-site community learning center located at Southwest Trails. Foundation Communities' afterschool programs offer academic assistance, enrichment activities, fitness activities, nutrition lessons and provide support services and educational opportunities for parents as well. Our PATHS (Planning Ahead Toward Health and School Success) program helps low-income children address low reading scores and obesity/inactivity/poor nutrition, setting them on a path to lifelong self-sufficiency and success. FC maintains a strong relationship with nearby schools with teachers and after-school staff working together to help each child succeed. Our afterschool programs currently serve over 900 students each year.

Summer-Youth Program – Children living at Live Oak Trails will be able to attend the summer-youth program currently in place at Southwest Trails and held in the on-site community learning center. The goal of the Summer Youth Program is to provide a structured, supervised environment where youth can gain exposure to a variety of summer learning and enrichment activities, develop important social skills, and work toward a brighter future. In addition, the program will:

- provide free access to rewarding, hands-on educational, cultural, artistic, and recreational activities for youth ages 5-14.
- retain educational gains made during the school year.
- provide a structured, supervised time with caring adults who model and reward positive behavior and interaction.
- supply free, nutritious lunches and snacks five days per week.

Children's HOME Initiative –As family supportive housing, families living at Live Oak Trails will be eligible to be a part of FC's Children's HOME Initiative. The CHI program provides low-cost transitional housing for up to 18 months to families who are considered Extremely Low Income (at or below 30% of the area's MFI). By engaging in case management services, families are able to outline their path toward permanent affordable housing and work to achieve an independent and healthy lifestyle.

The following services will be provided for residents participating in the CHI program at Live Oak Trails:

- Computer training
- Intensive Case Management
- Individualized Family Support
- Crisis Management
- Financial Literacy
- Debt Management
- Children's Advocacy
- Educational Support
- Career Awareness & Enrichment
- Long-term Goal Development
- Resource Brokering

Other Supportive Service programs provided by Foundation Communities, but located OFF-SITE include:

Financial Education - A ten-hour personal finance course, offered in English and Spanish, will help SWT residents evaluate their financial status and set financial goals. The course includes a one-on-one credit counseling session and follow-up.

Financial Coaching - Families of Live Oak Trails will have the opportunity to meet individually with a trained volunteer. The volunteer works with the resident on a variety of personal finance issues which may include a credit report review, creating a credit repair plan or a debt reduction plan, establishing a household budget, exploring ways to reduce expenses, or setting financial goals. Financial Coaching sessions may be a single one hour session up to eight hours of individual sessions, depending on the situation.

Matched Savings Accounts - Individual Development Accounts will be offered to families of Live Oak Trails to help them save money for buying a first home, funding post-secondary education or opening or expanding a small business. Account holders earn matching funds ($1-$3 for each dollar saved) in special savings accounts. All participants commit to making regular monthly deposits and completing personal finance courses.

Microenterprise - Community Tax Centers provide services to self-employed and small business owners with five employees or fewer (including the owner), helping them to file their taxes and educating them about tax and liability implications and best practices.

College Savings & Financial Assistance - Families may open a Texas 529 College Savings Plan and receive up to $100 in incentives for their contributions. Trained staff are available at the Community Tax Centers and financial aid events to help students complete the Free Application for Federal Student Aid (FAFSA) to obtain grants and loans for college.

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

Live Oak Trails will house 58 families at any given time. The service needs of the property will vary according to the resident profile. We are reserving 20% of the units for FC's Children's HOME Initiative – a transitional supportive housing program that offers participants a menu of more intensive supportive services – although we expect to serve more families with this program at the property. With an average turnover of 20% and average family size of 2.5, we expect to serve approximately 174 adults and children a year with some degree of services.

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

Foundation Communities, as the primary supportive service provider at Live Oak Trails, has 20 years experience in the provision of supportive services to its residents. At all of our properties, we enable our residents to increase their personal development, education, safety, and health at one convenient location in their neighborhood. Through strategic partnerships, last year FC gave 900 children of working parents a safe place to go when school's out right where they live and helped 85% of students maintain or improve grades. Talented volunteers help us increase adults' earning potential through classes in English as a Second Language, GED preparation, and computer skills, as well as employment counseling and social service referrals. Throughout our learning centers, our newest program area, Health Initiatives, brings healthier living to entire families in the form of nutrition and cooking, active play, and exercise.

Each year, we also empower more than 100 families to become smart consumers through economic education and at least 50% of them to reduce debt. More than 125 families have earned a 2-to-1 match in special savings accounts to purchase a home, attended college, or started a business. We also provide free income tax preparation for 18,000+ low-income workers and retirees with the help of 600 IRS-certified volunteers. We are one of the first organizations in Austin to provide assistance with insurance sign-up under the Affordable Care Act.

The Children's HOME Initiative Program (CHI) is the only program of its kind in Austin. In 2003, Foundation Communities launched CHI to address the overwhelming need in the community for quality affordable housing for families with incomes of 30% of the Median Family Income. Grants from NeighborWorks America, a national funder, enabled us to pay down mortgages at three of our apartment complexes and permanently set aside apartments to create this program; 10% or more of every new family property we open will be targeted for CHI. Of a dozen national housing organizations that were granted similar funding, FC was the first to get the program up and running and has the longest and most successful track record. We have developed a successful model for helping families with extremely low incomes achieve self-sufficiency by providing stable housing and intensive case management. Since 2003, CHI has supported close to 300 families and more than 600 children in regaining housing and economic stability.

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

All supportive services at Live Oak Trails will be provided by Foundation Communities, Inc.

d. Provide resumes of key personnel who will be actively involved in the delivery of services. Resumes should include information about certifications, licenses, years of experience, and education.

Supportive Service Staff (Please see **ATTACHMENT 13** for staff resumes):

Julian Huerta – Deputy Director - provides leadership for all Foundation Communities' resident and community services. Julian develops and directs education, financial stability and supportive housing programs that serve more than 20,000 working poor families and homeless adults annually. He brings over 20 years' experience in program development, nonprofit administration and fundraising.

Mario Cortez, Director of Supportive Housing. Mario has 15 years of experience working with homeless and low-income populations, and holds a Masters in Social Work. Prior to joining Foundation Communities, he spent 3 years developing the Keep Austin Housed AmeriCorps project. He Co-Chairs the Social Services Case Management Network & the Housing Stability Committee of the Basic Needs Coalition, sits on the Executive Committee of the Basic Needs Coalition, and leads planning for Stand Up and Be Counted. Mario oversees all supportive housing programs.

Marisela Montoya, Director of Education for Foundation Communities, graduated from the University of Texas with a degree in Psychology. For 17 years, she has worked overseeing and implementing programs for youth and adults, including 8 years with Austin ISD as a program director and program specialist (Community Education; At Risk Youth Programs; afterschool, teen, and adult education programs). She has been with Foundation Communities for 10 years, first as Lead Learning Center Coordinator, and now as Director of Education. She holds a certificate in Nonprofit Leadership and Management from Austin Community College and Texas Association of Nonprofit Organizations.

Erika Leos - Adult Education Coordinator, is responsible for teaching the ten-hour financial education course (in both English and Spanish) available to residents of Foundation Communities and a required component of participants in the Individual Development Account (IDA) Matched Savings Program. Leos also oversees the English as a Second Language program offered on Foundation Communities' properties. Leos earned a Bachelor's of Business Administration from the University of Texas at Austin in 2002.

Karen Lyons – Director of Asset Building - is responsible for all aspects of FC's Asset Building Programs. She was the past Director of FC's IDA savings program. Her experience includes five years of experience teaching ESL and a long involvement with immigrant issues. She has a BA in Education.

All Foundation Communities' Learning Center Coordinators are highly qualified, with degrees in education, social work, or a related field. Some have Masters Degrees, and all are bilingual. They undergo rigorous staff training on a regular basis, and are involved in both implementing and evaluating PATHS at their property's Learning Center, including coordinating with local schools and designing homework assistance for individual students. Learning Center Coordinators' bios are available upon request.

Case Managers in the CHI program meet with families weekly to address the family financial situation and underlying issues that contribute to their poverty. We also have a Housing Placement Specialist and Parent/Child Advocate. All CHI case managers and the Parent/Child Advocate have degrees in social work or other related fields, and have a wealth of experience in the community and in assisting impoverished clients.

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

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

Uses of Funds:

Direct Expenses	Amount	Notes
1 full-time Resident Service Coordinator	$35,000	One FTE salary
1 part-time Adult Education Coordinator	$18,000	One PTE salary
Taxes and Benefits	$10,600	20% of salary
Supplies and Printing	$1,000	for client meetings and classes
Training/Travel	$1,000	Professional education
Direct Aid to Clients	$1,400	Bus passes, work search expenses, etc.
TOTAL	**$67,000**	

NOTE: Live Oak Trails will utilize the Learning Center at Southwest Trails. The learning center staff in place will be able to manage the new children from Phase II without adding capacity. The supportive service component will need the addition of a full-time Resident Service Coordinator and part-time Adult Education Coordinator.

Sources of Funds:
The funding for the supportive services to be provided at Live Oak Trails will be raised from private foundations, corporations and individuals. This is the same method used to fund the supportive service programs in place at our existing family properties. We have a donor base that is dedicated to the support of our service programs. Past funders we will tap include:

- Michael and Susan Dell Foundation – Children's HOME Initiative and financial programs
- Lowe Foundation – Children's HOME Initiative
- Rachael and Ben Vaughan Foundation – Children's HOME Initiative
- Tomberg Foundation
- Texas State Affordable Housing Corporation
- Amerigroup Foundation
- JPMorgan Chase Foundation – Financial Programs
- Individual Donors dedicated to this part of our mission.

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

Please see **ATTACHMENT 14** for a detailed supportive services budget for Live Oak Trails.

ATTENTION:

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

RHDA PROGRAM
SCORING CRITERIA

REQUIRED INFORMATION:

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

EVALUATION CRITERIA:

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

CORE VALUES POINTS

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

Score

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

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

Score

2. **AFFORDABILITY PERIOD** (25 points) **25**

25 points: Affordability period is:

_____ 99 years;

OR

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

Score

3. GEOGRAPHIC DISPERSION (maximum 25 points) **15**

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

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

Please see ATTACHMENT 15 for documentation.

INITIATIVES AND PRIORITIES POINTS

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

Score

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

25 points: "Housing First" model.

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

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

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

Score

5. SINGLE-FAMILY RENTAL HOUSING, INCLUDING SECONDARY UNITS ("GREEN ALLEY INITIATIVE") (20 points) **0**

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

Score

6. ACCESSIBILITY AND HOUSING FOR PERSONS WITH DISABILITIES (maximum 20 points) **0**

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

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

Score

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

10 points: Project is:

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

Score

8. PRESERVATION OF AFFORDABLE UNITS (10 points) **0**

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

Score

9. TRANSITIONAL HOUSING (10 points) **0**

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

UNDERWRITING POINTS

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

Score

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

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

Score

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

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

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

Score

12. DEBT COVERAGE RATIO (maximum 10 points) **10**

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

Score

13. LEVERAGE (maximum 10 points) **10**

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

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

Score

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

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

Score

15. PROJECT READINESS (maximum 10 points) **6**

New construction
2 points each; maximum 10 points
2 The project meets the normal eligibility requirements under the existing program guidelines.
2 The property is already owned by the developer.
_____The project has completed all necessary design work and received site plan approval.
2 All environmental reviews have been completed.
_____The project has firm commitments from all financing sources.

Acquisition and Rehab
2 points each; maximum 10 points
_____The project meets the normal eligibility requirements under the existing program guidelines
_____All environmental reviews have been completed.
_____The project has firm commitments from all financing sources.
_____A General Contractor has been selected.
_____Closing on the acquisition of the property can be achieved in less than 30 days.

Acquisition of Completed Units
2.5 points each; maximum 10 points (A total score of 2.5 points will be rounded to 3; a total score of 7.5 points will be rounded to 8.)
_____The project meets the normal eligibility requirements under the existing program guidelines
_____All environmental reviews have been completed.
_____The project has firm commitments from all financing sources.
_____Closing on the acquisition of the property can be achieved in less than 30 days.

Score

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

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

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

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

Score

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

15 points:

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

10 points:

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

5 points:

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

Score

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

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

NOTE: Although the project does not include MBE/WBE on the development team at this time, it will most definitely include MBE/WBE businesses when completely formed.

TOTAL SCORE 176

ATTACHMENT 1:
CERT OF STATUS

Corporations Section
P.O.Box 13697
Austin, Texas 78711-3697

Nandita Berry
Secretary of State

Office of the Secretary of State

Certificate of Fact

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

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

In testimony whereof, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in Austin, Texas on January 23, 2014.

Nandita Berry

Nandita Berry
Secretary of State

ATTACHMENT 2:
IRS LETTERS

Internal Revenue Service

Date: August 24, 2004

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

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

Person to Contact:
Janet M. Duncan 31-07676
Customer Service Specialist
Toll Free Telephone Number:
8:00 a.m. to 6:30 p.m. EST
877-829-5500
Fax Number:
513-263-3756
Federal Identification Number:
[redacted]

Group Exemption Number:
7171

Dear Sir or Madam:

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

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

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

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

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

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

Sincerely,

Janna K. Skufca

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

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

DEPARTMENT OF THE TREASURY

Date:
JUN 06 1995

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

Employer Identification Number:
[redacted]

Case Number:
755122043
Contact Person:
ANNETTE SMITH
Contact Telephone Number:
(214) 767-6023

Our Letter Dated:
May 23, 1990
Addendum Applies:
No

Dear Applicant:

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

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

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

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

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

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

Sincerely yours,

Bobby E. Scott
District Director

ATTACHMENT 4:
RESOLUTION

RESOLUTION
BOARD OF DIRECTORS OF
Foundation Communities, Inc.
Live Oak Trails

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

Up to $500,000 in funding for a proposed 58-unit supportive housing, rental community for families located at 8500 Highway 71, Austin, TX 78735. The funding will be used for acquisition and/or construction costs.

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

Adopted and approved by the Board of Directors on the 17th day of September, 2014.

FOUNDATION COMMUNITIES, INC.

Jason Qunell, Chair
Board of Directors of Foundation Communities, Inc.

ATTACHMENT 5:
NEIGHBORHOOD PLAN

8

Housing is a crucial issue in every neighborhood plan, especially in areas, like Oak Hill, with strong residential identities. This chapter describes the character and housing market of Oak Hill. Recommendations are driven by stakeholder concerns about protecting Edwards Aquifer and providing affordable housing. A related concern, neighborhood design, is discussed in Chapter 9.

CURRENT HOUSING CONDITIONS

EXISTING HOUSING TYPES AND STOCK IN OAK HILL

Most homes in Oak Hill are in single-family structures (Figure 8-1). There is a significant difference between West Oak Hill (with approximately 91% in single family houses) and East Oak Hill (47%). Figure 8-2 shows another difference between East and West Oak Hill: since 2000, West Oak Hill has continued to see substantial residential growth, while East Oak Hill has seen relatively little. The figure also shows a shift in the nature of development in West Oak Hill, with slightly more multi-family units than single-family units built. Despite this, the overall character of the entire planning area has changed relatively little over this time period (see Figure 8-1).

West Oak Hill will continue to see more residential development in the future, given the strong demand for housing in southwest Austin and the area's large

Figure 8-1: Housing units in the planning area by type in 2000 and 2007

		Multifamily		
Year	Single family	2, 3, 4-family buildings	5+ family buildings	Other
East Oak Hill	47.3%	3.9%	48.3%	0.5%
West Oak Hill	91.0%	5.7%	2.7%	0.7%

Figure 8-2: New housing unit permits by type between 2000 and 2007, in East and West Oak Hill

		Multifamily		
	Single family	2, 3, 4-family buildings	5+ family buildings	Mobile homes
West Oak Hill	1091	241	881	3
East Oak Hill	198	66	0	0

GOALS, OBJECTIVES AND RECOMMENDATIONS

8.A. Balance development and environmental protection by maintaining a vibrant residential and commercial community.

8.A.1

Assess and minimize the impact of land development on surface and ground water.

8.A.1a—Every housing development/redevelopment should include an environmental impact analysis and incorporate all necessary measures to address its potential impact on the Edwards Aquifer (impervious cover, drainage, traffic, etc).

8.A.2

Design and place homes to minimize impacts on natural resources and the physical environment and to maximize social resources.

8.A.2a—Clustered development should be encouraged where appropriate (see Chapter 9: Neighborhood Design).

8.A.2b—Residential density should be compatible with surrounding uses and informed by a regional vision of the environmental impact development has over the Edwards Aquifer.

8.A.2c—Whenever possible, new housing development should be located where existing services and infrastructure exist. Their appearance and density should be appropriate to its environment and compatible with surrounding uses.

8.B. Preserve neighborhood identity, character, affordability, and diversity.

8.B.1

Analyze transportation demands in the Oak Hill area.

8.B.1a—For housing development/redevelopment projects where traffic impact is a concern, a traffic analysis should be done due to current traffic problems, long-term challenges of road expansion and improvement, and the overall lack of connectivity of the area (see Chapter 7: Transportation and Infrastructure). Such analysis should consider the adequacy of road connectivity, mobility, alternate transit modes, access, and condition.

tracts of undeveloped land.

Austin as a whole is growing at a fast pace, and Oak Hill is one of its fastest growing neighborhoods, spurred by major employers, like AMD and Freescale, beginning to relocate here. The housing market in Oak Hill is already anticipating future growth as AMD's branch nears completion.

According to an Austin American-Statesman article (June 22, 2006), Oak Hill is one of the places where buyers wanting to stretch their dollars are looking to, as home prices rise across Austin. In Oak Hill, "the number of homes sold in May [2006] rose to 41 from 28 last year, bumping the median home price up 31 percent to $359,000."*

This trend has continued through the writing of this chapter (June 2007). Another strong factor pulling more buyers to this area (apart from the "push" effect of soaring housing prices in centrally located areas) is the high ratings of some of the AISD schools that Oak Hill feeds into, like Bowie High School.

According to market analysts with Keller Williams Realty, "any time there are more pending listings than active listings in an area, it indicates very strong demand." As of March 2007, according to Keller Williams, for "homes priced below $200,000, the ratio citywide is 0.63," while the ratio for similarly priced homes for the areas feeding into Bowie was 1.89 (pending/active listings), meaning that the demand was extremely high.**

Further, the "established neighborhood feel" of most residential areas in Oak Hill, with mature trees and well-maintained lawns and front yards, speak to the residents' pride in living there, which usually translates into either sustained or rising housing values.

Figure 8-3: Single family homes in Oak Hill

Figure 8-4: Multi-family development in Oak Hill

* http://crosslandteam.com/blog/2006/06/22/austin-homes-sales-jump-15-percent-in-may/

** http://crosslandteam.com/blog/2007/03/04/homes-that-feed-bowie-high-school-in-hot-demand/

AFFORDABLE HOUSING IN OAK HILL

The City of Austin's Neighborhood Housing and Community Development Department (NHCD) reviews every neighborhood plan to assess its impact in providing affordable housing in Austin. An Affordability Impact Statement (AIS) documents this assessment. Part of NHCD's assessment involves determining "affordable for whom?" NHCD therefore looks at median family income (MFI), or some percentage thereof, which changes with household size. Figure 8-5 is a sample of the MFI chart for the Austin region; the full chart is available in Appendix E.

Figure 8-5: Median family income in the Austin area

	Median income percentages		
Household Size	Very Low Income* 50% of MFI	Low Income* 80% of MFI	Median Income 100% of MFI
1	$24,900	$39,850	$48,370
2	$28,450	$45,500	$55,280
3	$32,000	$51,200	$62,190
4	$35,550	$56,900	$69,100
5	$38,400	$61,450	$74,628
6	$41,250	$66,000	$80,156
7	$44,100	$70,550	$85,684
8	$46,950	$75,100	$91,212

Source: NHCD, 2008.
* "very low income" and "low income" are based on U.S. Housing and Urban Development income limits.

Figure 8-5: Housing types in Oak Hill

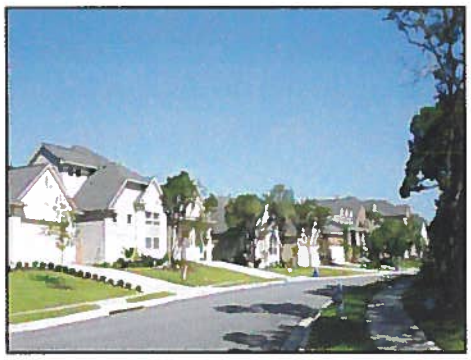


Figure 8-7: Housing types in Oak Hill

AFFORDABLE HOUSING INCENTIVES TASK FORCE

In 2006, City Council directed the City Manager to assemble an Affordable Housing Incentives Task Force, composed of stakeholders with a shared interest in providing adequate affordablehousing in Austin.

The Task Force discussed barriers, opportunities, costs and best practices across seven months of meetings. It formulated a statement of core values, recommendations, and enhancements to the City's current policies and procedures (including those related to securing and giving incentives to S.M.A.R.T. Housing™; see below). The Task Force's recommendations spanned all kinds of neighborhoods in Austin, from downtown to suburban.

Some of the recommendations that the Task Force developed* that may be applicable to suburban neighborhoods:

- Creating affordable rental opportunities in suburban/greenfield areas for residents earning between 50% and 80% of MFI.
- Creating affordable homeownership opportunities in suburban/greenfield areas for residents earning between 50% and 80% of area MFI.
- Dispersing affordable homes and apartments throughout Austin.
- Offering developers and builders the option to pay a fee in lieu of providing affordable units on-site, in exchange for increases in density.
- Offering density bonuses to developments in the Central Business District and in Transit-Oriented Development Districts and/or high density developments (due to the preliminary status of the plan for an Oak Hill station, this plan will need to revisit this point when the status of such a plan is finalized and decided upon).

Oak Hill and affordability

Although housing affordability is an essential part of a sustainable neighborhood or area plan, there needs to be a careful examination of the current conditions of a location to assess the feasibility of building or providing this component into its future development plans.

Figure 8-7: Southwest Trails, Oak Hill
Photo credit: Austin Apartment Store website

Figure 8-8: Southwest Trails S.M.A.R.T. Housing ™ development in Oak Hill

* The Affordable Housing Incentives Task Force Report, http://www.ancweb.org/docs/AHITF%20Final%20Report%202_20_07.pdf

- Offering a density bonus to multifamily developments to achieve affordability.
- Creating an expedited review and approval process for qualifying projects.
- Structured upzoning in exchange for 10% of rental units reserved for people at or below 60% MFI for a period of 40 years.

EXISTING AFFORDABLE HOUSING

Oak Hill currently has two prominent sources of affordable housing. One is a City-financed apartment complex designed to create affordability, while the other is a traditional market response to low income levels and land costs.

Southwest Trails: S.M.A.R.T. Housing ™

S.M.A.R.T. Housing ™ (Safe, Mixed-income, Accessible, Reasonably-priced, Transit-oriented), administered by the Austin Housing Finance Corporation (AHFC), is designed to stimulate the production of affordable housing for low- and moderate-income households in Austin. S.M.A.R.T. Housing™ developments meet the City's Green Building standards and are located throughout Austin.

Through the S.M.A.R.T. Housing ™ program, the City provides fee waivers and expedited development reviews. These developments can be single-family, multi-family, or infill.

Southwest Trails, the only S.M.A.R.T. Housing™ development in West Oak Hill, is located at 8405 Old Bee Caves Road. It has 81 units that serve households at 50% MFI and 79 units at 60% MFI. In order to achieve the affordability goals for this development and also comply with the SOS Ordinance, the Austin Housing Finance Corporation provided the following assistance in 2000:

- $6.5 Million AHFC Bonds
- $500,000 HOME
- $500,000 Housing Trust Fund

Mobile Homes

Mobile homes provide affordable housing along the edges of cities, where rents are usually lower. There are several mobile home parks throughout Oak Hill: Country Aire and Trails of Oak Hill located off of Old Bee Caves Road are the largest ones, followed by the Holiday Mobile Home Park on U.S. Highway 290 W.

Figure 8-9: Mobile Home Parks in Oak Hill

CONSTRAINTS TO AFFORDABLE HOUSING

Land and home values have risen dramatically in the past few years, posing a challenge to creating affordable housing in Oak Hill. Other factors further constrain affordability.

Environmental features

Because of the maximum impervious cover limits allowed in the aquifer recharge and contributing zones, tools like density bonuses—so often used for affordable housing incentives—and up-zoning may not be appropriate. Future development and redevelopment will require water detention and irrigation facilities, which will drive up the cost of housing and can become a deterrent to providing affordable units.

Land availability

According to NHCD, S.M.A.R.T. Housing™ projects are not viable at less than 14 units per acre. By contrast, market rate housing usually becomes viable at 7 units per acre for single family housing and between 6 and 14 units per acre for multi-family housing. The low-density zoning of much of the Oak Hill residential areas reduces the amount of land where development of this density can be placed. More intense development also requires paying special attention to Oak Hill's environmental features.

S.M.A.R.T. Housing™ projects should be located near public transit facilities. Transit service is relatively rare in Oak Hill, and is mainly available along U.S. Highway 290. The small size of the properties on the east side of William Cannon, fronting Highway 290, would require an aggressive land assembly strategy. On the west side of William Cannon, larger lots are available, though other factors are likely to prevent the development of affordable housing here as well.

Existing multi-family units and the rental market

Multi-family complexes in the planning area (along Monterrey Oaks Boulevard, Southwest Parkway, and William Cannon Drive) were designed for families with high incomes. Because most of them were built fairly recently, these units are unlikely to be redeveloped soon. This means that, in the long run, the rental market in Oak Hill will probably remain high end.

OPPORTUNITIES FOR AFFORDABLE HOUSING IN OAK HILL

Given the aforementioned constraints, one approach to affordability in Oak Hill is by securing and maintaining existing affordable units. Another approach is through taking advantage of the incentives from the Vertical Mixed Use (VMU) opt-in process. The next section of this chapter presents recommendations addressing this issue. NHCD's Affordability Impact Statement is Appendix E.

NEIGHBORHOOD HOUSING

8.A. Balance development and environmental protection by maintaining a vibrant residential and commercial community.

8.A.1

Assess and minimize the impact of land development on surface and ground water.

8.A.1a—Every housing development/ redevelopment should include an environmental impact analysis and incorporate all necessary measures to address its potential impact on the Edwards Aquifer (impervious cover, drainage, traffic, etc).

Figure 8-10: Detention pond in Oak Hill

8.A.2

Design and place homes to minimize impacts on natural resources and the physical environment and to maximize social resources.

8.A.2a—Clustered development should be encouraged where appropriate. (See "Location of Housing" in this chapter.)

8.A.2b—Residential density should be compatible with surrounding uses and informed by a regional vision of the environmental impact development has over the Edwards Aquifer.

8.A2c—Whenever possible, new housing developments should be located where existing services and infrastructure exist. Their appearance and density should be appropriate to its environment and compatible with surrounding uses.

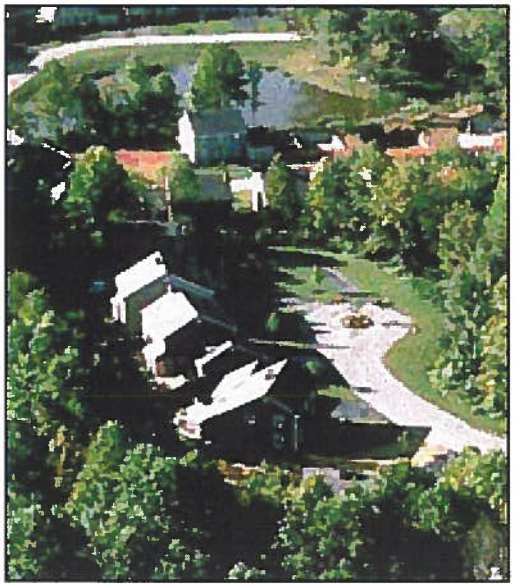


Figure 8-11: Clustered development

8.B. Preserve neighborhood identity, character, affordability, and diversity.

8.B.1
Analyze transportation demands in the Oak Hill area.

8.B.1a—For housing development/redevelopment projects where traffic impact is a concern, a traffic analysis should be done due to current traffic problems, long-term challenges of road expansion and improvement, and the overall lack of connectivity of the area (see Chapter 7: Transportation and Infrastructure). Such analysis should consider the adequacy of road connectivity, mobility, alternate transit modes, access, and condition.

Implementation Note: The City currently requires that a traffic impact analysis must be submitted with any site plan, zoning, or rezoning application that is expected to generate more than 2,000 trips per day. New housing developments are reviewed by staff to ensure they comply with environmental, drainage, transportation, subdivision, and water quality regulations.

STAKEHOLDER INPUT ON HOUSING

During the land use meetings that planning staff held with stakeholders, housing did not come up as a crucial or contentious topic. Nevertheless, staff collected the following impressions and comments, which were consistent with the neighborhood's initial vision and goals statements. Stakeholders drafted these goals to inform and steer the plan's recommendations, in conjunction with further discussions with stakeholders and other departments.

Goal 8.A. speaks of balancing "development and environmental protection by maintaining a vibrant residential and commercial community." When asked to define what a "vibrant residential community" would be for Oak Hill, stakeholders gave characteristics that were sometimes widely shared and sometimes sharply opposed.

Figure 8-12: Multi-family complex in Oak Hill

Residential density

While most stakeholders supported keeping the rural character of most existing neighborhoods through low density, large lot zoning, others supported allowing more intense development in appropriate locations (see next topic). Some community members supported redevelopment op-

tions given that it would bring in more services to the neighborhood and respond to the area- and city-wide demand for housing.

Location of housing

Most meeting participants supported maintaining the low density existing residential neighborhoods, while concentrating higher density residential development closer to major thoroughfares, employment centers such as AMD and Freescale, and existing services and infrastructure. This was seen as a way to support residential expansion without creating urban sprawl.

Affordable housing

In Oak Hill, the only affordable housing alternatives are provided by mobile home parks and the Southwest Trails S.M.A.R.T. Housing™. Despite recognizing that mobile homes were some of the few affordable housing alternatives in Oak Hill (notwithstanding the S.M.A.R.T. Housing™ project), some stakeholders did not see them as desirable. Others said that mobile home owners who also own their lot should be able to make improvements, such as upgrading to a permanent foundation, and that mobile home park owners should be encouraged to create landscaped buffers around the edges of their property. Indeed, stakeholders said that aesthetics was their objection to existing mobile home parks, rather than compatibility or safety.

No supportive comments were made on the SMART Housing™ project, though stakeholders were supportive of it.

These mobile homes provide affordable housing to people who need or wish to live closer to the Hill Country and take advantage of its location and its amenities. While neighborhood plans draw on stakeholder visions, they must also act as stewards of fairness and inclusiveness. Thus, while recognizing the concerns over mobile homes, sound planning principles guiding this plan prevent it from taking away the right of these residents to continue living there. This plan does, however, provide residents and property managers with information about available programs and resources for upgrading or improving their homes (see below).

This plan recommends maintaining all mobile home parks in Oak Hill.

Retirement communities

Stakeholders asked the City to provide opportunities to create more retirement communities in Oak Hill. The City's blueprint for addressing its most critical housing and community development needs, the 2005-06 Action Plan of the five-year Consolidated Plan, states that over the last decade the number of people 60 to 64 years old has increased over 17%, while the population over 65 years of age has grown over 28%. The needs of this population,

Figure 8-13: St George's Court Senior Housing in Austin.
Photo from St. George's Court website

such as fixed incomes and medical care, must be addressed.

NEIGHBORHOOD HOUSING AND COMMUNITY DEVELOPMENT PROGRAMS

NHCD provides housing, community development, and small business development services to eligible residents so they can access livable neighborhoods and become more self-sufficient. To this end, NHCD administers several programs directly and provides grants to other agencies and non-profit organizations.

NOTE: The content and nature of these programs may change from time to time, so please check on their respective websites for updates.

Austin Housing Finance Corporation
http://www.ci.austin.tx.us/ahfc/

AHFC, created in 1979, is a public, nonprofit corporation and instrument of the City of Austin. Its mission is to generate and implement strategic housing solutions for the benefit of Austin's low- and moderate-income residents. It primarily issues bonds for financing reasonably priced single-family and multi-family housing and assists the City in using HOME Investment Partnerships and Community Development Block Grant (CDBG) to create reasonably priced housing. Its construction specialists help residential property owners through the process of selecting a contractor and will inspect the project throughout the construction phase.

Homeowner Rehabilitation Loan Program
www.cityofaustin.org/housing

This program assists homeowners with substantial repairs to foundations, roofing, plumbing, and electrical systems.

Emergency Home Repair Program
Austin Area Urban League, (512) 478-7176

AHFC contracts with the Austin Area Urban League to administer the Emergency Home Repair (EHR) program, which provides repair assistance to low-income homeowners who are facing a life-threatening condition or a health and safety hazard. EHR staff work with the homeowner to develop a scope of work and manage the contracting and inspection process. This program serves homeowners with incomes at or below 80% of MFI.

Architectural Barrier Removal, and Home Rehabilitation Loan Program
(512) 974-3863 or http://www.ci.austin.tx.us/ahfc/repairs_arcbr.htm

The Architectural Barrier Removal Program provides free assistance to elderly and severely disabled homeowners and renters to make their homes accessible. This allows clients to remain in their homes longer and live with more independence. If a resident is over the age of 62 or has a long-term or progressive disability, and earns 80% of MFI, he or she may be eligible for this program.

COMMERCIAL DESIGN

DESIGN STANDARDS & MIXED USE

In August 2006, the City adopted a Design Standards and Mixed Use subchapter within the Land Development Code. These standards are intended to improve the quality of all non-residential and mixed-use development in the City. They address building placement, parking, signage, stormwater management, exterior lighting, street trees, sidewalk width, compatibility, and building design. These standards vary according to the type of road adjacent to the site (Core Transit Corridors, Hill Country Roadways, Highways, Internal Circulation Routes, and Suburban Roadways).

Oak Hill has three of these five roadway types:

- Hill Country Roadway (Southwest Parkway),
- Highways (State Highway 71, Loop 1 and U.S. Highway 290), and
- Suburban Roadways (all other roads in Oak Hill).

Additionally, the design standards have specific provisions for sites greater than 5 acres, which can apply to larger non-residential developments. These provisions include specific design elements that would enhance the quality of such projects.

Participants at the February 2007 design workshop were asked to prioritize site design and building design standards. Staff organized responses from the workshop into four categories: high priority, medium priority, low priority, and not a priority, in order to guide developers and builders in selecting design standards. Those that were rated high, medium, and low priority are listed below by topic area. A complete list of stakeholder responses can be found in Appendix F.

Hill Country Roadway Standards

Hill Country Roadway standards address the character of development, including floor-to-area ratios, building height, impervious cover, roadway vegetative buffers, natural areas, and parking lot medians.

Currently, staff in the Watershed Development Review Department review all development applications for Hill Country Roadway compliance. For more information on the Hill Country Roadway Requirements, visit the City of Austin Website at **http://www.ci.austin.tx.us/development/default.htm.**

Figure 9-3: Natural Gardener in Oak Hill

9.A. Require landscaping along roadways, sidewalks, bike paths, and around bus stops to provide shade in order to encourage pedestrian, bicycling, and mass transportation

9.A.1

Incorporate pedestrian friendly **site design standards** in all new commercial development and redevelopment projects to create safe pedestrian environment in the planning area.

HIGH PRIORITY

9.A.1a—Provide open space and/or pedestrian amenities such as benches, bike racks, fountains, etc. for development sites greater than one acre.

9.A.1b—Provide street plantings at the time of new construction or major redevelopment.

9.A.1c—Provide pedestrian and bike connections from adjacent parkland and/or residential areas.

Figure 9-4: A shaded sidewalk

MEDIUM PRIORITY

9.A.1d—Provide shaded sidewalks along all publicly visible building facades.

9.A.1e—Parking should be placed behind or to the side of the building with vegetative screens to buffer sidewalks and trees.

9.A.1f—Promote the use of solar power shading devices in parking lots.

LOW PRIORITY

9.A.1g—Increase sidewalk width requirements from 12 to 15 feet.

9.A.1h—Comply with applicable water quality regulations for impervious cover by exploring pervious materials for sidewalks and other pedestrian surfaces.

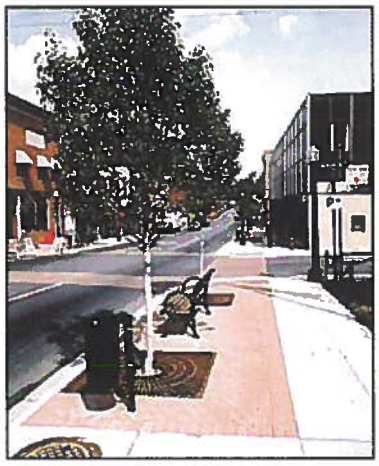


Figure 9-5: A pedestrian friendly streetscape

9.A.1i—Limit the amount of curb cuts by sharing driveways and parking areas with adjacent property owners.

9.A.1j—Building façades should be brought close to the sidewalks while still abiding by the minimum sidewalk width specifications for new sidewalks.

Figure 9-6: A solar power shading device in a parking lot

9.A.2

Encourage incorporation of pedestrian friendly **building design elements** in all non-residential development and redevelopment projects within the planning area.

Figure 9-7: Porous pavement

HIGH PRIORITY

9.A.2a—Use limestone, brick, or other regional building materials compatible with the Oak Hill "Hill Country" look.

9.A.2b—Integrate solar power into building design.

9.A.2c—Integrate green building practices such as solar power panels, wind power, rainwater collection systems, green roofs and water quality controls as necessary. If possible, projects should strive to achieve one star or higher rating under the City of Austin Green Building Program or other environmental programs.

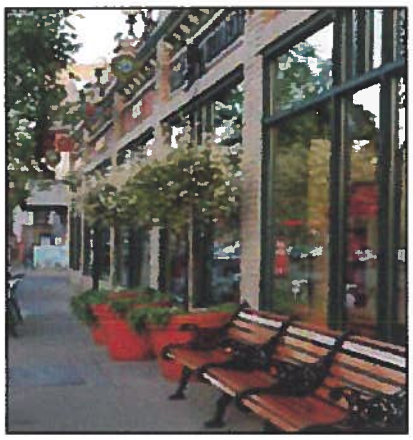


Figure 9-8: Pedestrian amenities and glazing on the facade

MEDIUM PRIORITY

9.A.2d—Provide façade articulation with wall recesses, projections, and/or different colors and textures.

9.A.2e—Make primary entrances visible by using architectural details, planters, enhanced light fixtures, and the like.

9.A.2f—At least 75% of the building's front façade (facing the principal street) should consist of storefronts with at least two separate entrances.

9.A.2g—Provide for liner stores in building façade. A liner store is a commercial use on the ground floor of a building located not more than 30 feet from the street right-of-way with an entrance facing the street.

LOW PRIORITY

9.A.2h—Provide glazing to add interest for pedestrians and provide a human-scale element on the building façade. (Glazing is the panes or sheets of glass or other non-glass material made to be set in frames, as in windows or doors.)

9.A.2i—Provide roof design such as parapets and sloping angles.

9.A.2j—Consider design and application of sustainable roof such as vegetated roofs and/or rainwater collection systems.

COMMERCIAL DESIGN GUIDELINES

In addition to prioritizing these commercial design standards, Oak Hill stakeholders were given the opportunity to provide additional recommendations for commercial design elements in Oak Hill. By establishing voluntary design guidelines, stakeholders have taken an active role creating a vision for the future built environment of their neighborhood.

9.B. Enhance the Hill Country look of the Oak Hill by preserving trees and addressing aesthetic improvements in the planning area.

9.B.1

The City Council should consider the application of the Hill Country Roadway Ordinance on U.S. Highway 290 and State Highway 71 and other roadways within the Oak Hill neighborhood planning area to control signage, limit heights, plant trees, and to preserve the natural beauty of the environment.

Figure 9-9: Example of roof designs

9.B.1a—Use low-luminance light sources, light shields, and other methods on street lights to protect the night sky from light pollution.

9.B.1b—Design commercial signs and billboards in a tasteful manner that would limit

light pollution after business hours.

9.B.1c—Preserve trees (such as oak, elms, and pecan trees) that are more than 100 years old by using two feet of mulch over the roots during construction.

9.B.1d—Partner with tree preservation experts on tree preservation practices in Oak Hill during new development. Promote trenching and other appropriate methods around existing oaks to prevent the spread of Oak Wilt.

9.B.1e—Utilize design elements and native materials in a consistent manner throughout new developments.

9.B.1f—Provide design elements that are compatible with Oak Hill's Hill Country town look.

9.B.1g—Provide landscaping in medians to create scenery at interchanges.

9.C. Balance development and environmental protection by maintaining a vibrant residential and commercial community that demonstrates caring stewardship of the environment.

9.C.1

Ensure that the environmental impact on the Edwards Aquifer and the existing natural landscape is kept at a minimum by new commercial development and redevelopment in Oak Hill.

9.C.1a—Incorporate water control measures within the design of the site.

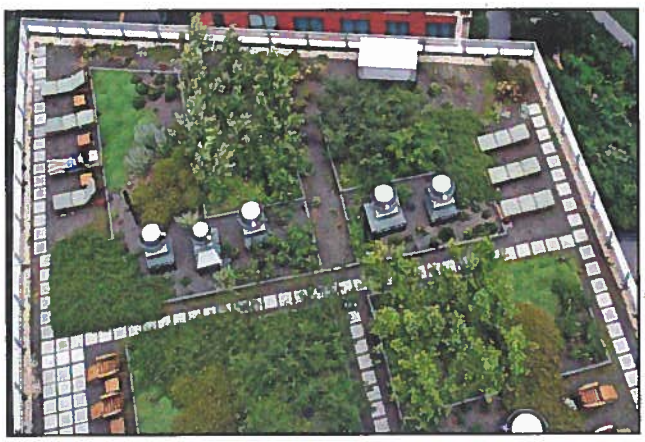


Figure 9-10: A sustainable roof

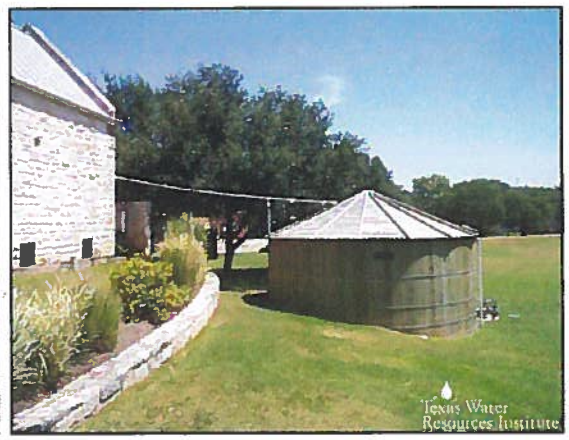


Figure 9-11: Rainwater harvesting facility

9.C.1b—Provide, protect, and preserve open spaces and environmental features by encouraging cluster developments.

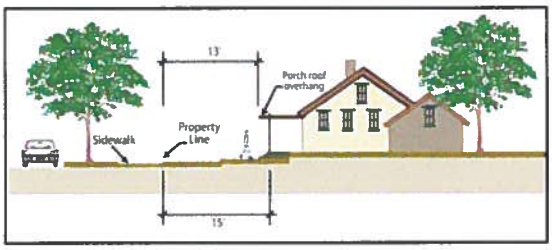


Figure 9-12: Front porch setback

RESIDENTIAL DESIGN TOOLS

During the February 2007 workshop, stakeholders provided input on the Residential Design Tools, which neighborhoods can adopt as part of the planning process. Once adopted, these residential design tools become law. In addition to the input at the workshop, a survey was posted online (results in Appendix F). The following design tools were supported by stakeholders. However, the total number of responses to the surveys was too low to confidently adopt with this plan.

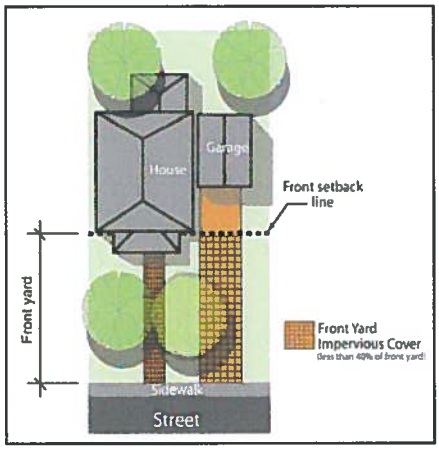


Figure 9-13: Parking placement

FRONT PORCH SETBACK

The minimum front setback in single-family districts is 25 feet. The front porch setback tool reduces the minimum front porch setback from 25 to 15 feet, with the porch roof overhang 13 feet from the front lot line. See Figure 9-12.

PARKING PLACEMENT

Parking is limited to four spaces in the front- or side-street yards, and impervious cover in the front yard may not exceed 40%, including sidewalks and driveways. See Figure 9-13.

GARAGE PLACEMENT

A garage may not be closer to the front lot line than the principal building façade. If the parking structure is less than 20 feet behind the principal building façade, the width of the parking structure may not exceed 50% of the width of the principal structure, measured parallel to the front lot line. See Figure 9-14.

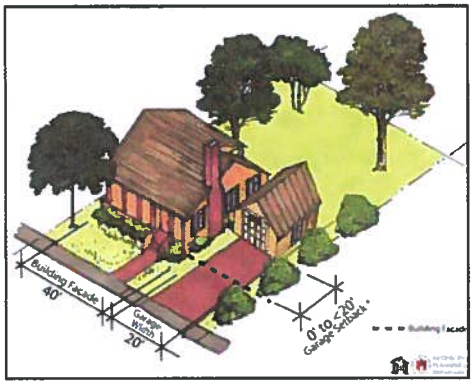


Figure 9-14: Garage placement

RESIDENTIAL DESIGN GUIDELINES

Oak Hill has a predominantly large lot rural residential character. These recommendations are based on comments from several land use meetings, as well as the design workshop, and respond to the most frequently raised concerns about residential design in the planning area.

Figure 9-15: Clustered development

9.C.2

All new residential development/ redevelopment projects in Oak Hill should strive to ensure that the environmental impact on the Edwards Aquifer and the existing natural landscape is kept at a minimum.

9.C.2a—Development and redevelopment of large sites should include measures such as pervious paving, rainwater collection system and smart irrigation where appropriate.

9.C.2b—Encourage developers to explore clustered development as an option, since it provides sufficient housing units while maintaining and preserving considerable amounts of open space. See additional information about cluster development in the box below.

9.C.2c—Builders should use the Green Building Standards in their projects whenever possible. Using local materials, considering water needs for landscaping, and installing efficient heating and cooling systems are all steps to building greener homes.

9.C.2d—Builders should explore the option of including a trail through their project site or dedicating an easement near water quality features.

9.D. Preserve neighborhood identity, character, affordability, and diversity.

9.D.1

New single-family and multi-family developments/redevelopments should be compatible with existing residential architecture to reinforce the Hill Country character of Oak Hill, in terms of materials, lighting, and height.

9.D.1a—Preserve Old German-style masonry and limestone construction.

9.D.1b—Place overhangs on roofs for shade.

9.D.1c—Provide abundant porch space.

9.D.1d—Utilize metal roofing or some other comparable material.

9.D.1e—Preserve character of old while incorporating sustainable green building practices.

9.D.1f—Incorporate vegetative buffers for all new residential neighborhoods.

Figure 9-16: A vertical mixed use building

FRONT YARD PARKING RESTRICTION

Stakeholders are concerned that vehicles parked in the front yard have a negative impact on the neighborhood as a whole. The City has worked hard to help neighborhoods maintain aesthetically pleasing communities. Front yard parking restrictions are available to neighborhoods during the planning process to achieve this. The restriction states that a "person may not park a motor vehicle in the front yard or side yard of a residential property, except in a driveway or a paved parking space depicted on an approved site plan." At an August 30, 2007, planning meeting, stakeholders voted to prohibit parking on front yards throughout the Oak Hill Combined Neighborhood Planning Area.

9.E. Provide managed connectivity between various neighborhoods while maintaining the quiet enjoyment of neighborhoods.

9.E.1

All new residential development and redevelopment projects should incorporate the following design elements to increase walk-ability throughout the Oak Hill area.

9.E.1a—Provide sidewalks for all new residential subdivisions.

9.E.1b—Keep existing trees along sidewalks to provide enough shade for residents walking.

VERTICAL MIXED USE

VMU districts promote pedestrian environments by allowing a mixture of uses within single buildings. More intense development is allowed when these buildings include affordable housing. VMU districts are restricted to the following areas:

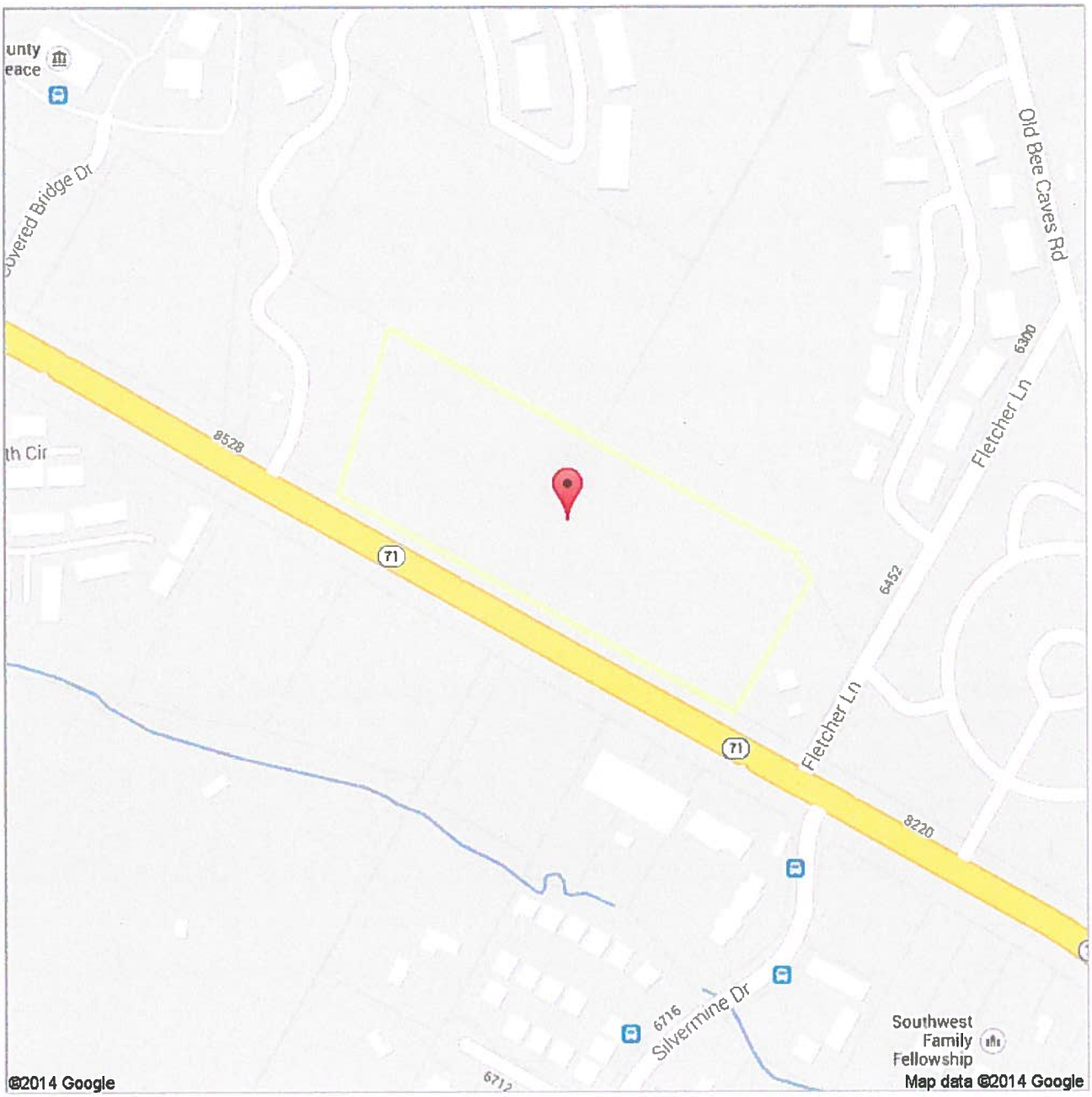
- VMU Overlay Districts (along a Highway, Hill Country Roadway, or Suburban Roadway),
- Mixed Use Combining Districts, and
- Non-VMU and non-mixed use sites that are more than 3 acres in size, abut a Highway, Hill Country Roadway, or Suburban Roadway, and receive a conditional use permit.

By default, VMU applies to all non-residential zoning district sites located along Core Transit Corridors and Future Core Transit Corridors.

All neighborhoods in the City were given the opportunity to opt properties into, or out of, VMU districts, subject to approval by City Council. In Oak Hill, the opt-in/opt-out process occurred alongside the neighborhood planning process. Staff held two meetings to discuss VMU opportunities with Oak Hill stakeholders. At the last VMU community meeting on August 30, 2007, the consensus was to not opt any properties into VMU.

ATTACHMENT 6:

MAPS



8500 Hwy 71

The bus stop serving route 171 is 385 feet from the edge of the site.

Southwest Trails Phase II

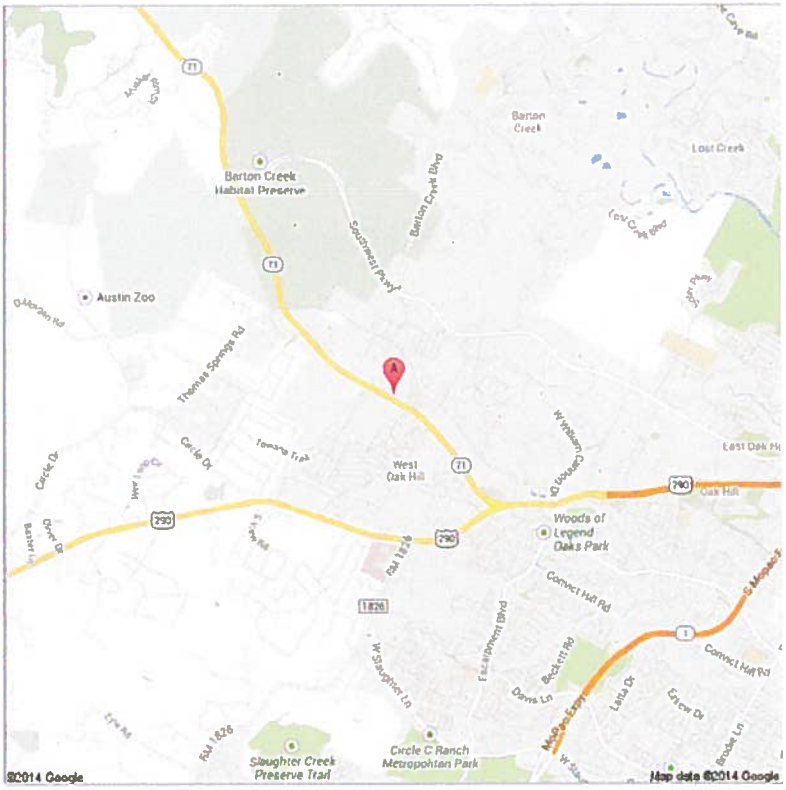
Southwest Trails Phase II

Route 171

Google

Address **8500 Texas 71**
Austin, TX 78735

Southwest Trails Phase II



ATTACHMENT 7:
SITE CONTROL

ELECTRONICALLY RECORDED 2014121573
TRV 4 PGS

15/ITC/BG/GF#1331791-GHR

NOTICE OF CONFIDENTIALITY RIGHTS: IF YOU ARE A NATURAL PERSON, YOU MAY REMOVE OR STRIKE ANY OR ALL OF THE FOLLOWING INFORMATION FROM ANY INSTRUMENT THAT TRANSFERS AN INTEREST IN REAL PROPERTY BEFORE IT IS FILED FOR RECORD IN THE PUBLIC RECORDS: YOUR SOCIAL SECURITY NUMBER OR YOUR DRIVER'S LICENSE NUMBER.

WARRANTY DEED WITH VENDOR'S LIEN

Date: August 13, 2014

Grantor: Michael B. Knepp

Grantor's Mailing Address:

3600 Wyldwood Rd.
Austin, TX 78729
Travis County

Grantee: FC Southwest Trails Housing, LP, a Texas limited partnership

Grantee's Mailing Address:

3036 S. 1st Street #200
Austin, TX 78704
Travis County

Consideration:

TEN AND NO/100 DOLLARS ($10.00) and other good and valuable consideration, and two notes of even date executed by Grantee and referred to as the first-lien note and the second-lien note. The first-lien note is payable to the order of Foundation Communities, Inc., a Texas non-profit corporation, in the principal amount of ONE MILLION TWO HUNDRED FIFTY THOUSAND AND NO/100'S DOLLARS ($1,250,000.00). The first-lien note is secured by the first and superior vendor's lien against, and superior title to, the Property retained in this deed in favor of Foundation Communities, Inc., and is also secured by a first-lien deed of trust of even date from Grantee to Walter Moreau, trustee. The second-lien note is payable to the order of Foundation Communities, Inc. in the principal amount of ONE MILLION FORTY-TWO THOUSAND NINE HUNDRED FIFTY AND NO/100'S DOLLARS ($1,042,950.00). The second-lien note is secured by a second and inferior vendor's lien against, and superior title to, the Property retained in this deed in favor of Foundation Communities, Inc., and is also secured by a second-lien deed of trust of even date from Grantee to Walter Moreau, trustee.

Property (including any improvements):

8.921 acres of land, more or less, out of the AUGUSTINE BOWLES SURVEY NO. 93 situated in Travis County, Texas and being the same property described as 7.9 acres of land out an 8.9 acre tract of land and 1.0 acre of land out of an 8.9 acre tract of land described in the Tax Resale Deed to Michael B. Knepp recorded in Document No. 2003254026, Official Public Records, Travis County, Texas. Said 8.921 acres of land being more particularly described by metes and bounds in Exhibit "A" attached hereto and made a part hereof.

Reservations from and Exceptions to Conveyance:

This conveyance is made and accepted subject to the following matters, to the extent same

are in effect at this time: Document No. 2003254026, documents of record at Vol. 1295, Pg. 549 and Vol. 1465, Pg. 10 and Vol. 1849, Pg. 60, all of the Official Public Records and/or Deed Records of Travis County, Texas, and to all zoning laws, regulations and ordinances of municipal and/or other governmental authorities, if any, but only to the extent they are still in effect, relating to the hereinabove described property. This conveyance is also subject to all oil, gas and mineral reservations of record, if any, covering the hereinabove described property. It is also subject to all visible or apparent easements.

Grantor, for the Consideration and subject to the Reservations from and the Exceptions to Conveyance, grants, sells, and conveys to Grantee, the Property, all of its interest in and to the Property; together with all and singular the rights and appurtenances thereto in any way belonging, to have and to hold it to Grantee and Grantee's heirs, successors, and assigns forever. Grantor binds Grantor and Grantor's heirs and successors to warrant and forever defend all and singular the Property to Grantee and Grantee's heirs, successors, and assigns against every person whomsoever lawfully claiming or to claim the same or any part thereof, by, through or under Grantor, but not otherwise, and except as to the Reservations to Conveyance and Warranty, when the claim is by, through, or under Grantor, but not otherwise.

The vendor's lien against and superior title to the Property are retained until each note described is fully paid according to its terms, at which time this deed will become absolute.

Foundation Communities, Inc., a Texas non-profit corporation, at Grantee's request, has paid in cash to Grantor that portion of the purchase price of the Property that is evidenced by the first-lien note. The first and superior vendor's lien against and superior title to the Property are retained for the benefit of Foundation Communities, Inc., and are transferred to Foundation Communities, Inc. without recourse on Grantor to secure the first-lien note. The second and inferior vendor's lien against and superior title to the Property are retained for the benefit of Foundation Communities, Inc. and are transferred to Foundation Communities, Inc. to secure the second-lien note. Foundation Communities, Inc. agrees that this second and inferior vendor's lien against and superior title to the Property are and will remain subordinate and inferior to all liens securing the first-lien note, regardless of the frequency or manner of renewal, extension, or alteration of any part of the first-lien note or the liens securing it.

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

Michael B. Knepp

STATE OF TEXAS)
)
COUNTY OF TRAVIS)

This instrument was acknowledged before me on the 13th day of August, 2014, by Michael B. Knepp.

BARBARA GIBSON
Notary Public, State of Texas
My Commission Expires
April 17, 2017

Notary Public, State of Texas

PREPARED IN THE OFFICE OF:

Gibson Davenport Anderson
4214 Medical Parkway, Ste. 202
Austin, TX 78756
Tel: 512-474-1144
Fax: 512-474-9023

AFTER RECORDING RETURN TO:

Independence Title Company
11215 S. IH-35, Ste. 102
Austin, TX 78747

Exhibit "A"

A DESCRIPTION OF 8.921 ACRES OUT OF THE A. BOWLES SURVEY No. 93, CONVEYED TO MICHAEL B. KNEPP, BY TAX RESALE DEED, ON OCTOBER 28, 2003, RECORDED IN DOCUMENT No. 2003254025 OF THE OFFICIAL PUBLIC RECORDS OF TRAVIS COUNTY, TEXAS; SAID 8.921 ACRE TRACT BEING MORE PARTICULARLY DESCRIBED BY METES AND BOUNDS AS FOLLOWS:

BEGINNING at a calculated point in the north right-of-way line of State Highway 71 (150' right-of-way), being at the southwest corner of the said 8.921 acre tract, and being also at the southeast corner of Lot 1, Southwest Trails, a subdivision of record under Document No. 200000300 of the Plat Records of Travis County, Texas, from which a concrete highway monument found in the north right-of-way line of State Highway 71, at engineer's centerline station 1719+88.53, bears North 62°00'40" West, a distance of 841.63 feet;

THENCE departing said right-of-way line, North 15°28'33" East, along the common line of the 8.921 acre tract and said Lot 1, at a distance of 0.83 feet passing a 1/2" rebar found, and continuing for a total distance of 380.93 feet to a 1/2" rebar found in the south line of Lot 3, Southwest Trails, at the northwest corner of the 8.921 acre tract, being the northeast corner of said Lot 1, from which another 1/2" rebar found bears South 50°13'28" West, a distance of 0.84 feet;

THENCE along the north line of the 8.921 acre tract, being in part, the south line of said Lot 3, and in part, the south line of a 19.887 acre tract described in a Warranty Deed to Central Texas/ SWA Mutual Housing Corporation recorded under Document No. 2001001683 of the Official Public Records of Travis County, Texas, the following two (2) courses:

1. South 61°58'36" East, a distance of 1042.18 feet to a 1/2" iron pipe found;

2. South 28°43'11" East, a distance of 80.68 feet to a 1/2" iron pipe found at the north corner of a 0.998 acre tract described in a Warranty Deed to M&M Equities IV, Inc. recorded in Volume 12492, Page 1047 of the Real Property Records of Travis County, Texas, from which a 1/2" rebar found bears North 22°20'58" West, a distance of 0.81 feet;

THENCE South 28°41'56" West, along the east line of the 8.921 acre tract, being the northwest line of the said 0.998 acre tract, at a distance of 335.12 feet passing a 1/2" iron pipe found, and continuing for a total distance of 335.39 feet to a calculated point in the north right-of-way line of State Highway 71, from which a concrete highway monument found in the north right-of-way line of State Highway 71, at engineer's centerline station 1745+61.69, bears South 62°03'29" East, a distance of 729.21 feet;

THENCE with the north right-of-way line of State Highway 71, being the south line of the 8.921 acre tract, the following two (2) courses:

1. North 62°03'29" West, a distance of 348.93 feet to a concrete highway monument found at engineer's centerline station 1734+68.49;

2. North 62°00'40" West, a distance of 668.48 feet to the POINT OF BEGINNING, containing 8.921 acres of land, more or less.

Surveyed on the ground February 5, 2004. Bearing Basis: Grid Azimuth for Texas Central Zone, 1983/93 HARN values from LCRA control network.

FILED AND RECORDED
OFFICIAL PUBLIC RECORDS

Dana DeBeauvoir

DANA DEBEAUVOIR, COUNTY CLERK
TRAVIS COUNTY, TEXAS
August 14 2014 02:46 PM
FEE: $ 38.00 2014121573

ATTACHMENT 8:

TAX DOCUMENTATION

Travis CAD

Property Search Results > 304767 KNEPP MICHAEL B for Year 2014

Property

Account

Property ID:	304767	Legal Description:	ABS 101 SUR 93 BOWLES A ACR 8.900
Geographic ID:	0402440213	Agent Code:	ID:2138
Type:	Real		
Property Use Code:			
Property Use Description:			

Location

Address:	8500 W STATE HY 71 TX 78735	Mapsco:	611L
Neighborhood:	#71W	Map ID:	040747
Neighborhood CD:	#71W		

Owner

Name:	KNEPP MICHAEL B	Owner ID:	271124
Mailing Address:	3604 WYLDWOOD RD AUSTIN , TX 78739-4408	% Ownership:	100.0000000000%
		Exemptions:	

Values

(+) Improvement Homesite Value:	+	N/A		
(+) Improvement Non-Homesite Value:	+	N/A		
(+) Land Homesite Value:	+	N/A		
(+) Land Non-Homesite Value:	+	N/A	Ag / Timber Use Value	
(+) Agricultural Market Valuation:	+	N/A		N/A
(+) Timber Market Valuation:	+	N/A		N/A

(=) Market Value:	=	N/A		
(–) Ag or Timber Use Value Reduction:	–	N/A		

(=) Appraised Value:	=	N/A		
(–) HS Cap:	–	N/A		

(=) Assessed Value:	=	N/A		

Taxing Jurisdiction

Owner: KNEPP MICHAEL B
% Ownership: 100.0000000000%
Total Value: N/A

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
01	AUSTIN ISD	N/A	N/A	N/A	N/A
02	CITY OF AUSTIN	N/A	N/A	N/A	N/A
03	TRAVIS COUNTY	N/A	N/A	N/A	N/A
0A	TRAVIS CENTRAL APP DIST	N/A	N/A	N/A	N/A
2J	TRAVIS COUNTY HEALTHCARE DISTRICT	N/A	N/A	N/A	N/A
68	AUSTIN COMM COLL DIST	N/A	N/A	N/A	N/A
	Total Tax Rate:	N/A			
				Taxes w/Current Exemptions:	N/A

Taxes w/o Exemptions:	N/A

Improvement / Building

No improvements exist for this property.

Land

#	Type	Description	Acres	Sqft	Eff Front	Eff Depth	Market Value	Prod. Value
1	LAND	Land	8.9000	387684.00	0.00	0.00	N/A	N/A

Roll Value History

Year	Improvements	Land Market	Ag Valuation	Appraised	HS Cap	Assessed
2014	N/A	N/A	N/A	N/A	N/A	N/A
2013	$0	$232,610	0	232,610	$0	$232,610
2012	$0	$200,000	0	200,000	$0	$200,000
2011	$0	$200,000	0	200,000	$0	$200,000
2010	$0	$200,000	0	200,000	$0	$200,000
2009	$0	$200,000	0	200,000	$0	$200,000

Deed History - (Last 3 Deed Transactions)

#	Deed Date	Type	Description	Grantor	Grantee	Volume	Page	Deed Number
1	1/1/2013							
2	1/1/2012							
3	10/13/2003	MS	MISCELLANEOUS	TRAVIS COUNTY	KNEPP MICHAEL B	00000	00000	2003254026TR

Questions Please Call (512) 834-9317

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Website version: 1.2.2.3

Database last updated on: 1/23/2014 3:22 AM

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ATTACHMENT 9:

ZONING

ORDINANCE NO. 20140612-092

AN ORDINANCE REZONING AND CHANGING THE ZONING MAP FOR THE PROPERTY RENAMED THE TERRACE AT OAK HILL LOCATED AT 8500 STATE HIGHWAY 71 WEST IN THE WEST OAK HILL NEIGHBORHOOD PLAN AREA FROM PLANNED UNIT DEVELOPMENT-NEIGHBORHOOD PLAN (PUD-NP) COMBINING DISTRICT TO PLANNED UNIT DEVELOPMENT-NEIGHBORHOOD PLAN (PUD-NP) COMBINING DISTRICT.

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

PART 1. The Terrace at Oak Hill Planned Unit Development (the "Terrace PUD") is comprised of approximately 8.92 acres of land located generally at 8500 State Highway West more particularly described as follows:

> An 8.92 acre tract of land, more or less, out of the Augustine Bowles Survey No. 93 the tract of land being more particularly described by metes and bounds in Exhibit "A" incorporated into this ordinance (the "Property").

PART 2. Terrace at Oak Hill PUD (formerly named the West 71 Office Park PUD) was approved on July 26, 2007, under Ordinance No. 20070726-104.

PART 3. The zoning map established by Section 25-2-191 of the City Code is amended to change the base district from planned unit development-neighborhood plan (PUD-NP) combining district to planned unit development-neighborhood plan (PUD-NP) combining district on approximately 8.92 acres of land, described in Zoning Case No. C814-2007-0009.01, on file at the Planning and Development Review Department and locally known as 8500 State Highway 71 West, in the City of Austin, Travis County, Texas, and generally identified in the map attached as Exhibit "B".

PART 4. This ordinance, together with the attached Exhibit C, is the land use plan for the Terrace PUD created by this ordinance. The Terrace PUD shall conform to the limitations and conditions set forth in this ordinance and in the Terrace at Oak Hill planned unit development land use plan. If any discrepancies between this ordinance and the Land Use Plan arise, this ordinance and any amendments prevail. Except as otherwise specifically provided by this ordinance and land use plan, all other rules, regulations, and ordinances of the City apply to the PUD.

PART 5. The attached exhibits are incorporated into this ordinance in their entirety as though set forth fully in the text of this ordinance. The exhibits are as follows:

Exhibit A:	Legal description
Exhibit B:	Zoning map
Exhibit C:	Land Use Plan
Exhibit D:	Grow Green Native and Adapted Landscape Plants
Exhibit E:	Invasive Species/Problem Plants

PART 6. Land Use and Site Development Regulations.

See Sheets C-1 and C-2 of Exhibit C, the Land Use Plan for additional land use and site development regulations.

A. Except as otherwise provided in this ordinance, the Property is subject to multifamily residence limited density (MF-1) district permitted uses, conditional uses, and site development regulations.

B. The maximum square footage for all uses shall be a total of 60,000 square feet.

C. Development of the Property may not exceed a floor to area ratio (F.A.R.) of 0.75:1.

D. Development of the Property shall not exceed 62 residential units.

E. Development of the Property shall not exceed an average density of 7 residential units per acre.

F. A site or building permit for the Property may not be approved, released, or issued if the completed development or uses of the Property, considered cumulatively with all existing or previously authorized development and uses, would generate traffic that exceeds 2,000 trips per day.

PART 7. Code Modifications. In accordance with Chapter 25-2, Subchapter B, Article 2, Division 5, (*Planned Unit Developments)* of City Code, the following site development regulations apply to the PUD instead of otherwise applicable City regulations:

A. Section 25-2-144(D) (*Planned Unit Development (PUD) District Designation*) is modified to waive the 10 acre PUD requirement.

B. Section 25-2-492 (*Site Development Regulations*) is modified to limit the maximum building coverage to 10% of the site.

C. Section 25-8-482 (*Water Quality Transition Zone*) is modified to allow a 3.57 acre portion of the Property associated with Williamson Creek and identified on the Land Use Plan to be classified as Uplands Zone. See Exhibit C, Sheet C-3.

D. Sections 25-8-301 (*Construction of a Roadway or Driveway*) and 25-8-302 (*Construction of a Building or Parking Area*) are modified to allow for construction on slopes with a gradient between 15 percent and 35 percent with the following delineations:

1. this allowance does not include areas associated with building foundation or water quality/detention ponds, areas already permitted by Code, or preclude future administrative variance requests for cut-and-fill for swales and drainage ditches;

2. impervious cover on slopes from 15 percent to 25 percent shall be limited to 0.11 acres (4,792 square feet) and on slopes from 25 percent to 35 percent shall be limited to 0.07 acres (3,049 square feet); and,

3. the location of the additional impervious cover is generally depicted on Exhibit C, Sheet C-5.

PART 8. Environmental.

A. For each site plan application filed for commercial, industrial, mixed use, multifamily residential or open space areas for the PUD, the developer shall submit an integrated pest management (IPM) plan that complies with Sections 1.6.9.2(D) and (F) of the Environmental Criteria Manual to the Director of the Planning and Development Review Department for approval of the plan.

B. All trails within the PUD shall be constructed with permeable materials.

C. At the time an application for approval of a site plan is submitted for development of the Property or any portion of the Property, a landscape plan shall be submitted to the Planning and Development Review Department for

review and approval. Ninety percent of the total plant material used, exclusive of turf, shall be native to Central Texas or on the Grow Green Native and Adapted Landscape Plants list, attached as Exhibit "D". Plants on the Invasive Species/Problem Plants list, attached as Exhibit "E", may not be used.

D. The limits of the northeast critical water quality zone and water quality transition zone, as established in City Code Sections 25-8-92 (A) and (B) (*Critical Water Quality Zones Established*) and as described in Exhibit C, Land Use Plan, Sheets C-3 and C-4, are based on City of Austin GIS data as of April 1, 2014.

E. The location of the downstream buffer area described in Exhibit C, Land Use Plan, Sheet C-6, is approximate and may be modified as necessary to accommodate the final site layout.

F. The minimum allowable downstream buffer area is 3.75 acres.

G. The downstream buffer area shall remain undeveloped, except for the following:

water quality facilities
detention facilities
drainage facilities
utility connections
utility crossings
permeable trails.

PART 9. The Property is subject to Ordinance No. 20081211-097 that established the West Oak Hill neighborhood plan combining district.

PART 10. This ordinance takes effect on June 23, 2014.

PASSED AND APPROVED

June 12, 2014 § Lee Leffingwell
Mayor

APPROVED: Karen M. Kennard
City Attorney

ATTEST: Jannette S. Goodall
City Clerk

Chaparral

Professional Land Surveying, Inc.
Surveying and Mapping

Office: 512-443-1724
Fax: 512-389-0943

3500 McCall Lane
Austin, Texas 78744

8.921 ACRES
AUGUSTINE BOWLES SURVEY NO. 93

A DESCRIPTION OF 8.921 ACRES OF LAND (APPROXIMATELY 388,600 SQ. FT.) OUT OF THE AUGUSTINE BOWLES SURVEY NO. 93, SITUATED IN TRAVIS COUNTY, TEXAS, AND BEING THE SAME PROPERTY DESCRIBED AS 7.9 ACRES OF LAND OUT OF AN 8.9 ACRE TRACT OF LAND AND 1.0 ACRE OF LAND OUT OF AN 8.9 ACRE TRACT OF LAND DESCRIBED IN VOLUME 2047, PAGE 178 OF THE DEED RECORDS OF TRAVIS COUNTY, TEXAS AND CONVEYED TO MICHAEL B. KNEPP BY TAX RESALE DEED, DATED OCTOBER 28, 2003 AND RECORDED IN DOCUMENT NO. 2003254026 OF THE OFFICIAL PUBLIC RECORDS OF TRAVIS COUNTY, TEXAS; SAID 8.921 ACRE TRACT BEING MORE PARTICULARLY DESCRIBED BY METES AND BOUNDS AS FOLLOWS:

BEGINNING at a calculated point in the north right-of-way line of State Highway 71 (150' right-of-way), being at the southwest corner of the said 8.921 acre tract, and being also at the southeast corner of Lot 1, Southwest Trails, a subdivision of record under Document No. 200000300 of the Plat Records of Travis County, Texas, from which a concrete highway monument found in the north right-of-way line of State Highway 71, at engineer's centerline station 1719+86.53, bears North 82°00'40" West, a distance of 841.63 feet;

THENCE North 15°28'33" East departing said right-of-way line, along the common line of the 8.921 acre tract and said Lot 1, at a distance of 0.83 feet passing a 1/2" rebar found, and continuing for a total distance of 380.93 feet to a 1/2" rebar found in the south line of Lot 3, Southwest Trails, at the northwest corner of the 8.921 acre tract, being the northeast corner of said Lot 1, from which another 1/2" rebar found bears South 50°13'26" West, a distance of 0.34 feet;

THENCE along the north line of the 8.921 acre tract, being in part, the south line of said Lot 3, and in part, the south line of a 19.687 acre tract described in a Warranty Deed to Central Texas/ SWA Mutual Housing Corporation recorded under Document No. 2001001683 of the Official Public Records of Travis County, Texas, the following two (2) courses and distances:

1. South 61°59'36" East, a distance of 1042.18 feet to a 1/2" iron pipe found;

2. South 25°43'11" East, a distance of 60.68 feet to a 1/2" iron pipe found at the north corner of a 0.996 acre tract described in a Certificate Regarding Mergers to 7-Eleven recorded in Document 2013011903 of the Official Public Records of Travis County, Texas, from which a 1/2" rebar found bears North 22°20'58"

Exhibit A

West, a distance of 0.81 feet;

THENCE South 28°41'58" West, along the east line of the 8.921 acre tract, being the northwest line of the said 0.996 acre tract, at a distance of 335.12 feet passing a 1/2" iron pipe found, and continuing for a total distance of 335.39 feet to a calculated point in the north right-of-way line of State Highway 71, from which a concrete highway monument found in the north right-of-way line of State Highway 71, at engineer's centerline station 1745+61.69, bears South 62°03'29" East, a distance of 729.21 feet;

THENCE with the north right-of-way line of State Highway 71, being the south line of the 8.921 acre tract, the following two (2) courses and distances:

1. North 62°03'29" West, a distance of 345.93 feet to a concrete highway monument found at engineer's centerline station 1734+68.49;

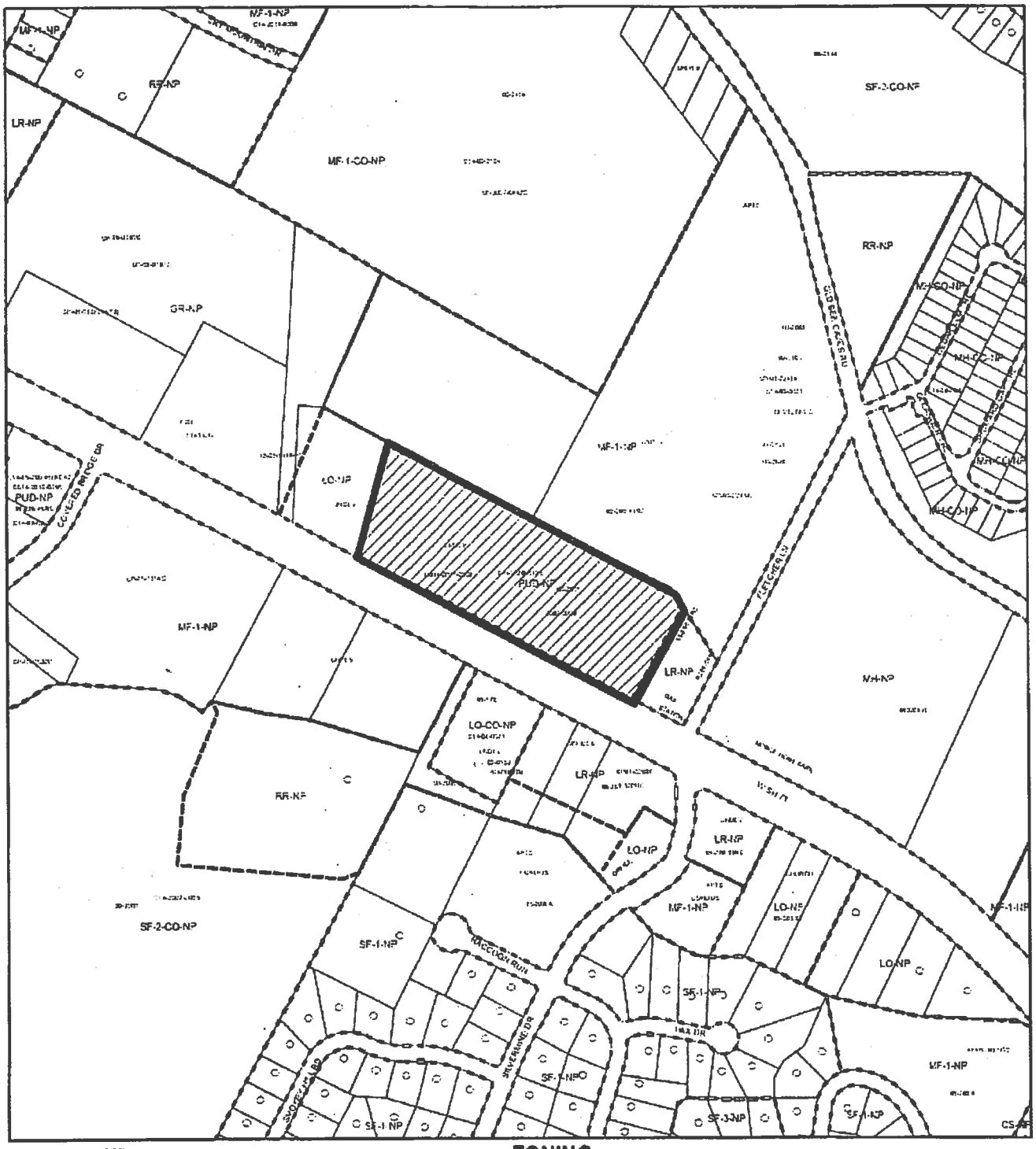
2. North 62°00'40" West, a distance of 658.46 feet to the **POINT OF BEGINNING**, containing 8.921 acres of land, more or less.

Surveyed on the ground April 11, 2013. Bearing Basis: Grid Azimuth for Texas Central Zone, 1983/93 HARN values from LCRA control network.

Robert C. Watts, Jr.
Registered Professional Land Surveyor
State of Texas No. 4995

STATE OF TEXAS REGISTERED ROBERT C. WATTS, JR. 4995 PROFESSIONAL LAND SURVEYOR

4-18-13



ZONING

ZONING CASE#: C814-2007-0009.01

N

SUBJECT TRACT

PENDING CASE

ZONING BOUNDARY

1 " = 400 '

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

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

Exhibit B

Multi-Family

Maximum Multi-Family & Allowable Accessory Use Square Footage:	60,000 S.F
Maximum Units Per Acre:	7.00
Maximum Number of Residential Units.	62

The Terrace in Oak Hill

Impervious Cover Calculations

	Uplands
By code:	4.22 acres
Added:	3.57 acres
Subtotal:	7.79 acres
WQTZ	0.75 acres (remaining WQTZ)
CWOZ	0.38 acres
Total:	8.92 acres (Cross Site Area)

Net Site Area:

Slope	Net Site Area		
0-15%	7.47 ac x 100%	=	7.47 ac
15-25%	0.25 ac x 40%	=	0.10 ac
25-35%	0.06 ac x 20%	=	0.01 ac
>35%	0.01 ac x 0%	=	0.00 ac
Subtotal	7.79 ac		7.58 ac (Net Site Area)

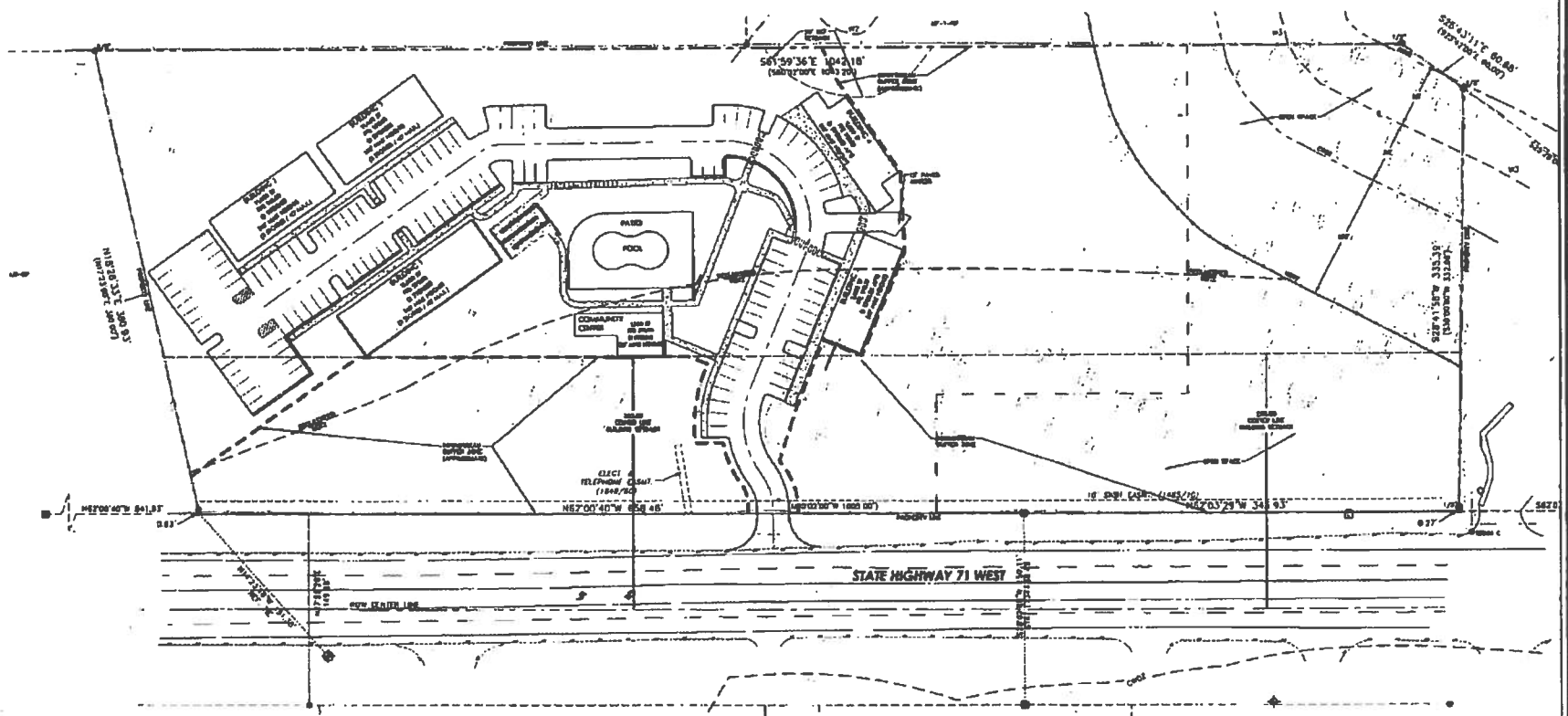
Open Space Area:	2.26 ac
Downstream Buffer Zone:	3.75 ac
Net Site Area:	7.58 ac
Allowable Impervious Cover on Net Site Area @25%:	1.90 ac

Site Data:

Minimum Setbacks:
- Front Yard - 25 ft
- Side Yard - 5 ft
- Rear Yard - 10 ft

Maximum Building Coverage: 10%
Maximum Building Height: 40 ft
Maximum Floor Area Ratio: .75/1

Legend
Open Space
CWOZ - to be retained
WQTZ - to be retained
WQTZ - to be reclassified
Downstream Buffer



THIS CONCEPTUAL PLAN IS FOR ILLUSTRATIVE PURPOSES, PARKING LOCATIONS AND QUANTITIES AND BUILDING LOCATIONS AND DIMENSIONS ARE SUBJECT TO CHANGE, PROVIDED ANY SUCH CHANGES ARE WITHIN THE SITE DEVELOPMENT STANDARDS AND ALLOWANCES SPECIFIED ON THIS LAND USE PLAN AND/OR IN THE ACCOMPANYING ORDINANCE.

Doucet & Associates, Inc.
7401 B Hwy. 71 West, Suite 160
Austin, TX 78735
Phone: (512) 583-2600 Fax: (512) 583-2601
www.doucetandassociates.com

P.U.D. LAND USE PLAN
CASE NO. - C814-2007-0009.01

TERRACE IN OAK HILL
8500 W HIGHWAY 71
AUSTIN, TX 78746

SHEET 1 OF 6

W HWY. 71 / F.E. CHEP I.N.

Exhibit C

NOTES

1. DEVELOPMENT OF THIS PROPERTY SHALL NOT EXCEED AN AVERAGE OF 7.00 RESIDENTIAL UNITS PER ACRE.

2. THE LOCATION OF THE "DOWNSTREAM BUFFER AREA" IS APPROXIMATE AND MAY BE MODIFIED AS NECESSARY TO ACCOMODATE THE FINAL SITE LAYOUT. THE MINIMUM ALLOWABLE DOWNSTREAM BUFFER AREA IS 3.75 ACRES.

3. THE DOWNSTREAM BUFFER AREA WILL REMAIN UNDEVELOPED, EXCEPT FOR THE FOLLOWING ALLOWABLE COMPONENTS:
   A. WATER QUALITY CONTROLS AND DETENTION FACILITIES
   B. PERMEABLE TRAILS
   C. DRAINAGE FACILITIES
   D. UTILITY CONNECTIONS AND CROSSINGS

4. ALL TRAILS WITHIN THIS PUD MUST BE PERMEABLE SURFACE. NO HARD SURFACE TRAILS ARE PERMITTED IN THE DOWNSTREAM BUFFER. TRAILS ARE PERMITTEDIN THE DOWNSTREAM BUFFER PROVIDED THAT THEY ARE CONSTRUCTED OF PERMEABLE MATERIAL INSTALLED OVER NON COMPACTED BASE.

5. PARKING WILL BE PROVIDED IN ACCORDANCE WITH CHAPTER 26.6 TRANSPORTAION APPENDIX A OF THE CITY OF AUSTIN L.D.C.

6. TOTAL IMPERVIOUS COVER ON SLOPES FROM 15%-35% WILL NOT EXCEED 0.18 ACRES.

7. THE LIMITS OF THE NORTHEAST CWQZ, WQTZ AS DEPICTED IN THE LAND USE PLAN ARE BASED ON CITY OF AUSTIN GIS DATA AS OF APRIL, 2014.

Doucet & Associates, Inc.
7401 B Hwy. 71 West, Suite 160
Austin, TX 78735
Phone: (512) 583-2600 Fax: (512) 583-2601
TBPE F-8412
AUSTIN TEXAS · NORTHWEST HILLS · CORPUS CHRISTI
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P.U.D. NOTES

CASE NO. - C814-2007-0009.01

TERRACE IN OAK HILL
8500 W HIGHWAY 71
AUSTIN, TX 78746

SHEET
2
2 OF 6

D13-001

W. HWY. 71 / FLETCHER LN.

Exhibit C

AREA OF WQTZ

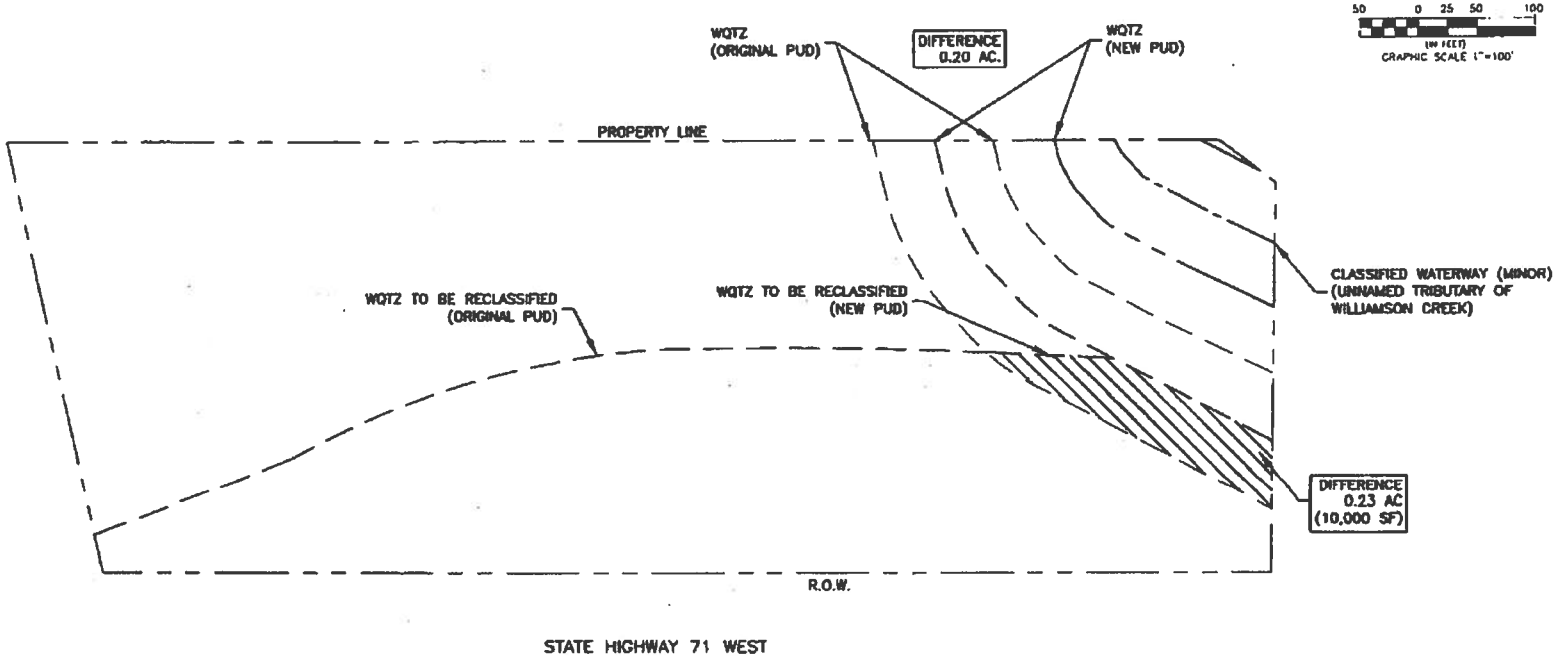
ORIGINAL PUD : 0.95 AC. (41,382 S.F.)
NEW PUD : 0.75 AC. (32,670 S.F.)

DIFFERENCE = 0.20 AC. (8,712 S.F.)

AREA OF WQTZ TO BE RECLASSIFIED

ORIGINAL PUD : 3.34 AC. (145,490 S.F.)
NEW PUD : 3.57 AC. (155,490 S.F.)

DIFFERENCE = .23 AC. (10,000 S.F.)



50 0 25 50 100
(IN FEET)
GRAPHIC SCALE 1"=100'

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www.doucetandassociates.com
Firm Registration Number: 3937

PUD ZONING EXHIBIT
WQTZ AREAS (EXISTING & PROPOSED)
TO BE RECLASSIFIED
CASE #C814-2007-0009.01

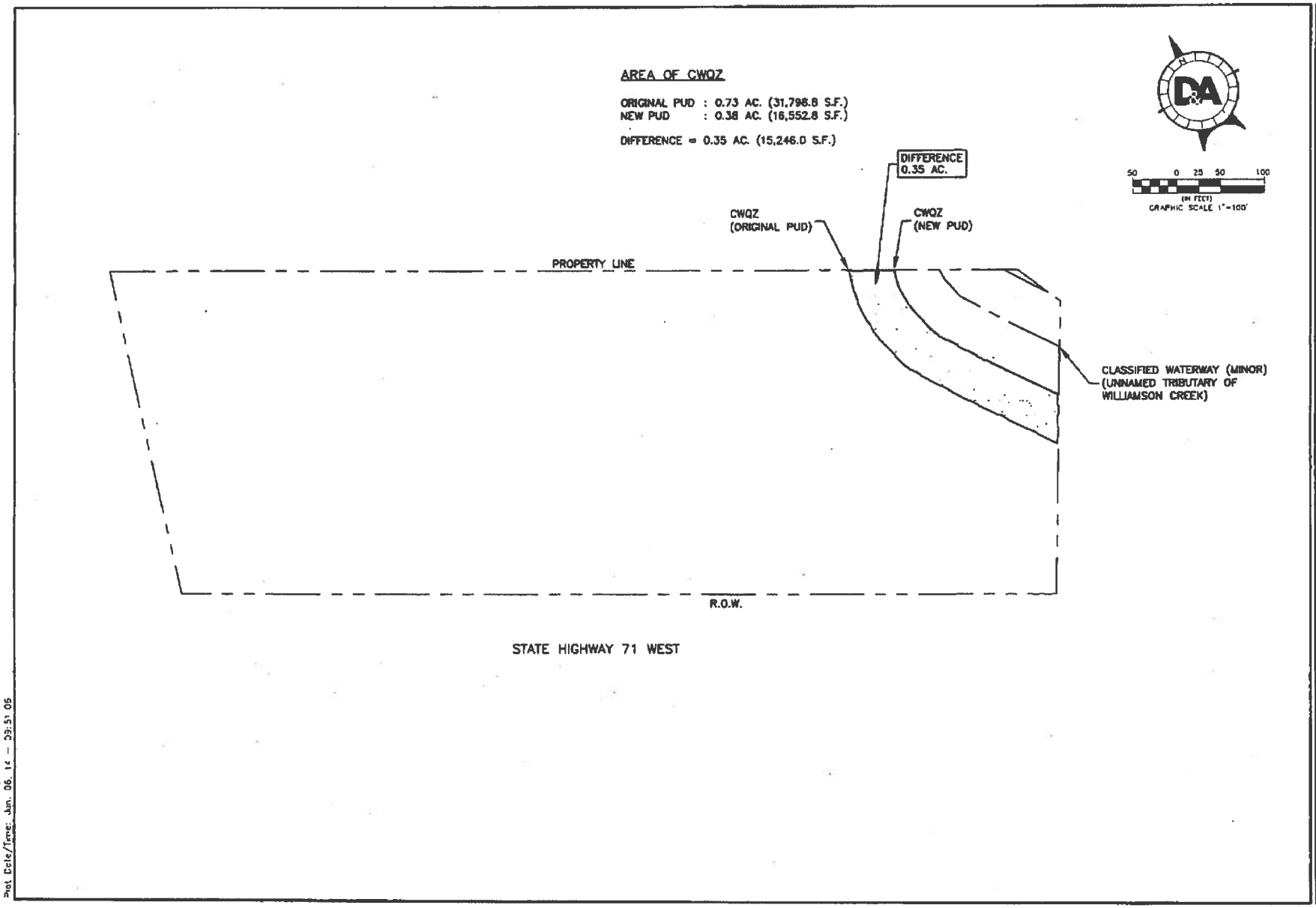
THE TERRACE IN OAK HILL
8500 S.H. 71 W
AUSTIN, TX 78735

SHEET 3 of 4

Project No: 1293-001

User: JEECKER
Last Modified: Jun. 06, 14 - 09:50
Plot Date/Time: Jun. 06, 14 - 09:50 '8

Exhibit C



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Firm Registration Number: 3937

PUD ZONING EXHIBIT
CWQZ AREAS
(EXISTING & PROPOSED)
TO BE RECLASSIFIED
CASE #C814-2007-0009.01

THE TERRACE IN OAK HILL
8500 S.H. 71 W
AUSTIN, TX 78735

SHEET
4
4 OF 6
Project No.:
1293-001

User: JBECKER
Last Modified: Jun. 06, 14 - 09:50
Plot Date/Time: Jun. 06, 14 - 09:51 06

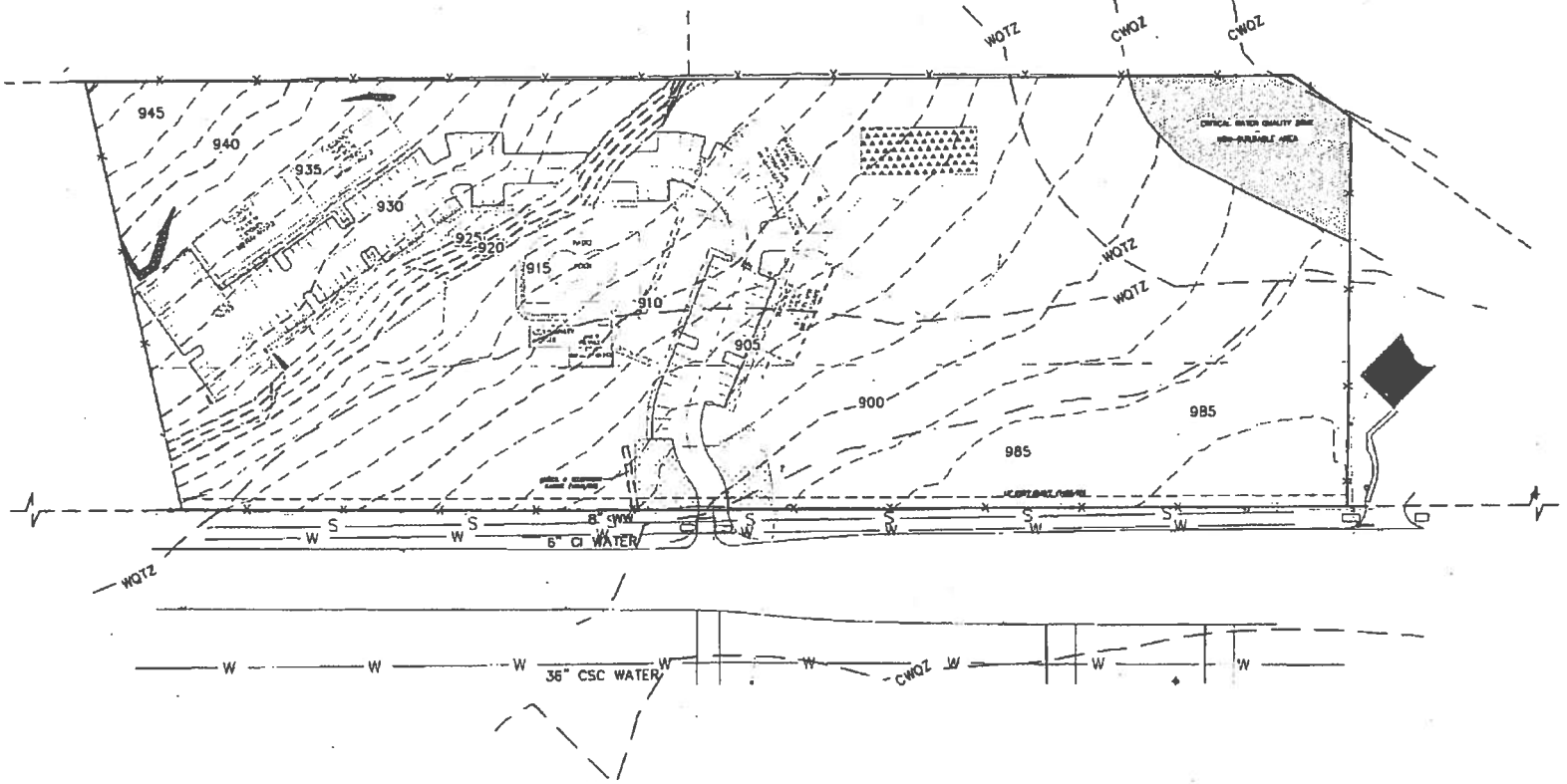
Exhibit C

NOTES:

1. PROPOSED IMPERVIOUS COVER ON SLOPES FROM 15%-25% WILL NOT EXCEED 0.11 ACRES (4,792 SF)
2. PROPOSED IMPERVIOUS COVER OR SLOPES FROM 25%-35% WILL NOT EXCEED 0.07 ACRES (3,049 SF)

SLOPES TABLE

Number	Minimum Slope	Maximum Slope	Area S.F.	Color
1	0%	15%	374,339.43	
2	15%	25%	10908.55	
3	25%	35%	2727.28	
4	35%	100%	624.74	



50 0 25 50 100
(IN FEET)
GRAPHIC SCALE 1"=100'

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PUD ZONING EXHIBIT
SLOPE MAP
#C814-2007-0009.01

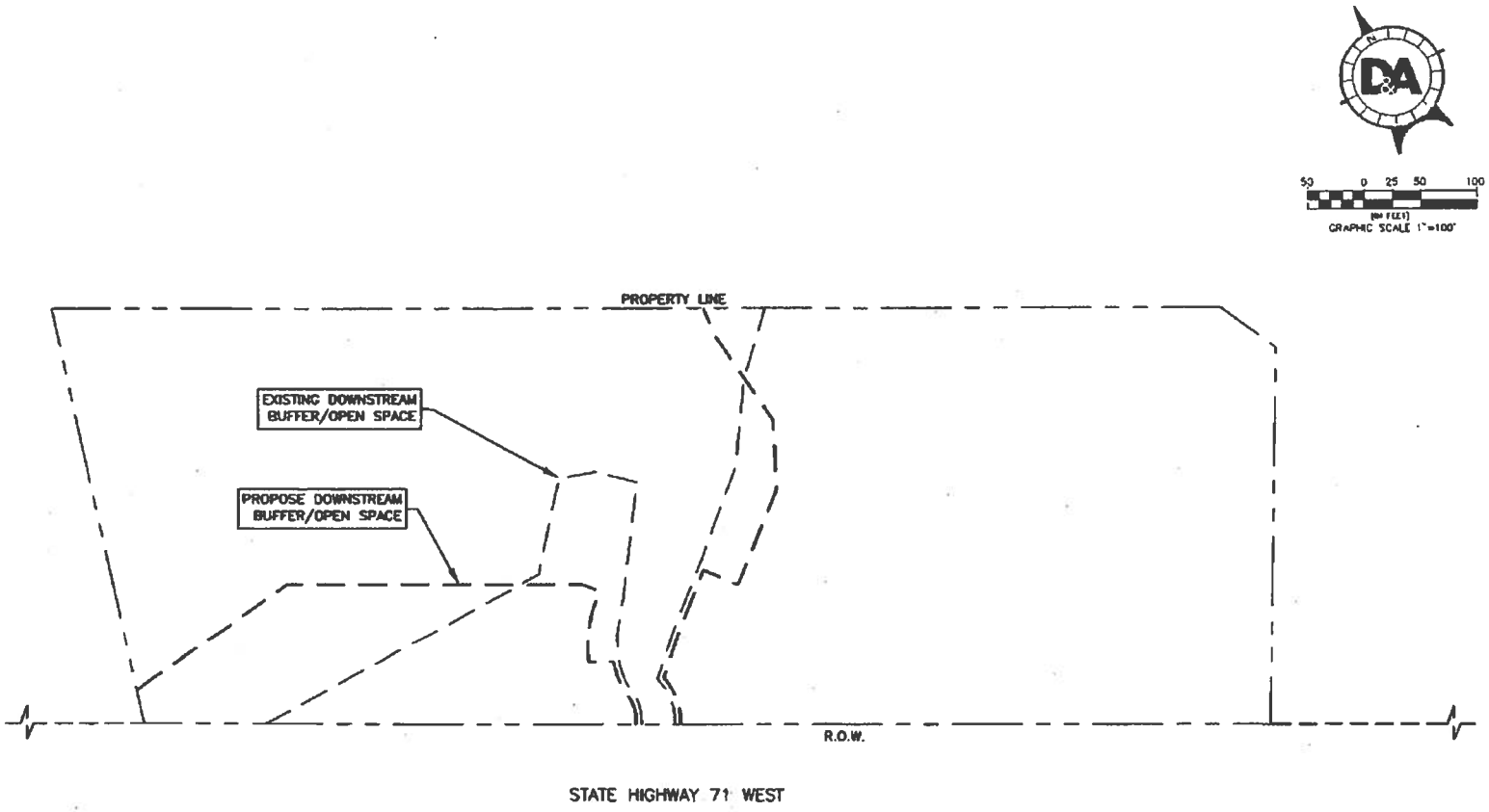
THE TERRACE IN OAK HILL
8500 S.H. 71 W
AUSTIN, TX 78735

SHEET
5
5 OF 6

Project No:
1293-001

User: JBECKER
Last Modified: Jun. 06, 14 - 09:50
Plot Date/Time: Jun. 06, 14 - 09:50:43

Exhibit C



EXISTING DOWNSTREAM BUFFER/OPEN SPACE = 3.37 AC.
PROPOSED DOWNSTREAM BUFFER/OPEN SPACE = 3.75 AC.

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Firm Registration Number 3937

PUD ZONING EXHIBIT
DOWN STREAM BUFFER ZONE
CASE #C814-2007-0009.01

THE TERRACE IN OAK HILL
8500 S.H. 71 W
AUSTIN, TX 78735

SHEET
6
6 OF 6

Project No:
1293-001

User: JBECKER
Last Modified: Jun 06, 14 - 09:5
Plot Date/Time: Jun 06, 14 - 09:51:22

Exhibit C

Grow Green Native and Adapted Landscape Plants

Trees

Ash, Texas *Fraxinus texensis*
Arizona Cypress *Cupressus arizonica*
Big Tooth Maple *Acer grandidentatum*
Cypress, Bald *Taxodium distichum*
Cypress, Montezuma *Taxodium mucronatum*
Elm, Cedar *Ulmus crassifolia*
Elm, Lacebark *Ulmus parvifolia*
Honey Mesquite *Prosopis glandulosa*
Oak, Bur *Quercus macrocarpa*
Oak, Chinquapin *Quercus muhlenbergii*
Oak, Southern Live *Quercus virginiana*
Oak, Escarpment Live *Quercus fusilformis*
Oak, Lacey *Quercus glaucoides*
Oak, Monterey (Mexican White) *Quercus polymorpha*
Oak, Shumard *Quercus shumardii*
Oak, Texas Red *Quercus texana (Quercus buckleyi)*
Pecan *Carya illinoinensis*
Soapberry *Sapindus drummondii*

Small Trees/Large Shrubs

Anacacho Orchid Tree *Bauhinia congesta*
Buckeye, Mexican *Ungnadia speciosa*
Buckeye, Rec *Aesculus pavia*
Carolina Buckthorn *Rhamnus caroliniana*
Cherry Laurel *Prunus caroliniana*
Crape Myrtle *Lagerstroemia indica*
Desert Willow *Chilopsis linearis*
Dogwood, Roughleaf *Cornus drummondii*
Escarpment Black Cherry *Prunus serotina var. eximia*
Eve's Necklace *Sophora affinis*
Goldenball Leadtree *Leucaena retusa*
Holly, Possumhaw *Ilex decidua*
Holly, Yaupon *Ilex vomitoria*
Mountain Laurel, Texas *Sophora secundiflora*
Persimmon, Texas *Diospyros texana*
Pistachio, Texas *Pistacia texana*
Plum, Mexican *Prunus mexicana*
Pomegranate *Punica granatum*
Redbud, Mexican *Cercis canadensis 'mexicana'*
Redbud, Texas *Cercis canadensis var. 'texensis'*
Retama Jerusalem Thorn *Parkinsonia aculeata*
Senna, Flowering *Cassia corymbosa*
Smoke Tree, American *Cotinus obovatus*
Sumac, Flameleaf *Rhus lanceolata*
Viburnum, Rusty Blackhaw *Viburnum rufidulum*
Viburnum, Sandankwa *Viburnum suspensum*

Exhibit D

Shrubs

Abelia, Glossy *Abelia grandiflora*
Agarita *Berberis trifoliata*
Agave (Century Plant) *Agave sp.*
American Beautyberry *Callicarpa americana*
Artemisia *Artemisia 'Powis Castle'*
Barbados Cherry *Malpighia glabra*
Barberry, Japanese *Berberis thunbergii 'Atropurpurea'*
Basket Grass (Sacahuista) *Nolina texana*
Black Dalea *Dalea frutescens*
Bush Germander *Teucrium fruticans*
Butterfly Bush *Buddleia davidii*
Butterfly Bush, Wooly *Buddleia marrubiifolia*
Coralberry *Symphoricarpos orbiculatus*
Cotoneaster *Cotoneaster sp.*
Eleagnus *Eleagnus pungens*
Esperanza/Yellow Bells *Tecoma stans*
Flame Acanthus *Anisacanthus quadrifidus var. wrightii*
Fragrant Mimosa *Mimosa borealis*
Holly, Burford *Ilex cornuta 'Burfordii'*
Holly, Dwarf Chinese *Ilex cornuta 'Rotunda nana'*
Holly, Dwarf Yaupon *Ilex vomitoria 'Nana'*
Jasmine, Primrose *Jasminum mesnyi*
Kidneywood *Eysenhardtia texana*
Lantana, Native *Lantana horrida*
Mistflower, Blue (Blue Boneset) *Eupatorium coelestinum*
Mistflower, White (Shrubby White Boneset) *Ageratina havanense*
Mock Orange *Philadelphus coronarius*
Nandina *Nandina domestica 'Compacta nana' 'Gulf Stream'*
Oleander *Nerium oleander*
Palmetto *Sabal minor*
Prickly Pear *Opuntia engelmannii var. lindheimeri*
Rose, Belinda's Dream *Rosa 'Belinda's Dream'*
Rose, Lamarne *Rosa 'Lamarne'*
Rose, Livin' Easy *Rosa 'Livin' Easy'*
Rose, Marie Pavie *Rosa 'Marie Pavie'*
Rose, Martha Gonzales *Rosa 'Martha Gonzales'*
Rose, Mutabilis *Rosa 'Mutabilis'*
Rose, Nearly Wild *Rosa 'Nearly Wild'*
Rose, Old Blush *Rosa 'Old Blush'*
Rose, Perle d'or *Rosa 'Perle d'or'*
Rock Rose *Pavonia lasiopetala*
Rosemary *Rosmarinus officinalis*
Sage, Mountain *Salvia regla*
Sage, Texas (Cenizo) *Leucophyllum frutescens*
Senna, Lindheimer *Cassia lindheimeriana*
Southern Wax Myrtle *Myrica cerifera*
Sumac, Evergreen *Rhus virens*
Sumac, Fragrant (Aromatic) *Rhus aromatica*
Texas Sotol *Dasylirion texanum*
Turk's Cap *Malvaviscus arboreus*
Yucca, Paleleaf *Yucca pallida*
Yucca, Red *Hesperaloe parviflora*
Yucca, softleaf *Yucca recurvifolia*
Yucca, Twistleaf *Yucca rupicola*

Perennials

Black-eyed Susan *Rudbeckia hirta*
Bulbine *B. frutescens or caulescens*
Bush Morning Glory *Ipomoea fistulosa*
Butterfly Weed *Asclepias tuberosa*
Buterfly Weed 'Mexican' *Asclepias curassivica*
Cast Iron Plant *Aspidistra elatior*
Chile Pequin *Capsicum annuum*
Cigar Plant *Cuphea micropetala*
Columbine, Red *Aquilegia canadensis*
Columbine, Yellow *Aquilegia chrysantha 'Texas Gold'*
Coreopsis *Coreopsis lanceolata*
Daisy, Blackfoot *Melampodium leucanthum*
Daisy, Copper Canyon *Tagetes lemmonii*
Damiantia *Crysactina mexicana*
Fall Aster *Aster oblongifolius*
Fern, River *Thelypteris kunthii*
Firebush *Hamelia patens*
Gaura *Gaura lindeheimeri*
Gayfeather *Liatris mucronata*
Gregg Dalea *Dalea greggii*
Hibiscus, Perennial *Hibiscus moscheutos, Hibiscus coccineus*
Honeysuckle, Mexican *Justicia spicigera*
Hymenoxys (Four Nerve Daisy) *Tetraneuris scaposa*
Indigo Spires *Salvia 'Indigo Spires'*
Iris, Bearded *Iris albicans*
Iris, Butterfly/Bicolor (African) *Dietes sp.*
Lamb's Ear *Stachys byzantina*
Lantana *Lantana x hybrida (many varieties)*
Lantana, Trailing *Lantana montevidensis*
Marigold, Mexican Mint *Tagetes lucida*
Obedient Plant, Fall *Physostegia virginiana*
Oregano, Mexican *Poliomintha longiflora*
Penstemon *Penstemon sp.*
Phlox, Fragrant *Phlox pilosa*
Pink Skullcap *Scutellaria suffrutescens*
Plumbago *Plumbago auriculata*
Poinciana, Red Bird of Paradise, Pride of Barbados
Caesalpinia pulcherrima
Primrose, Missouri *Oenothera macrocarpa*
Purple Coneflower *Echinacea purpurea*
Ruellia *Ruellia brittoniana*
Sage, Cedar *Salvia roemeriana*
Sage, Jerusalem *Phlomis fruticosa*
Sage, Majestic *Salvia guaranitica*
Sage, Mealy Blue *Salvia farinacea*
Sage, Mexican Bush *Salvia leucantha*
Sage, Penstemon, Big Red Sage *Salvia penstemonoides*
Sage, Russian *Perovaskia atriciplifolia*
Sage, Scarlet or 'Tropical' *Salvia coccinea*
Salvia, Gregg (Cherry Sage) *Salvia greggii*
Shrimp Plant *Justicia brandegeana*
Texas Betony *Stachys coccinea*
Verbena, Prairie *Verbena bipinnatifida*
Yarrow *Achillea millefolium*
Zexmenia *Wedelia texana*

Ornamental Grasses

Bluestem, Big *Andropogon gerardii*
Bluestem, Bushy *Andropogon glomeratus*
Bluestem, Little *Schizachyrium scoparium*
Fountain Grass, Dwarf *Pennisetum alopecuroides*
Indian Grass *Sorghasturm nutans*
Inland Sea Oats *Chasmanthium latifolium*
Mexican Feathergrass (Wiregrass) *Stipa tenuissima*
Muhly, Bamboo *Muhlenbergia dumosa*
Muhly, Big *Muhlenbergia lindheimeri*
Muhly, Deer *Muhlenbergia rigens*
Muhly, Gulf *Muhlenbergia capillaris*
Muhly, Seep *Muhlenbergia reverchonii*
Sideoats Grama *Bouteloua curtipendula*
Wild Rye *Elymus canadensis*

Vines

Asian Jasmine *Trachelospermum asiaticum*
Carolina Jessamine *Gelsemium sempervirens*
Coral Vine *Antigonon leptopus*
Crossvine *Bignonia capreolata*
Fig Vine *Ficus pumila*
Honeysuckle, Coral *Lonicera sempervirens*
Lady Banksia Rose *Rosa banksiae*
Passion Vine *Passiflora incarnata*
Trumpet Vine *Campsis radicans*
Virginia Creeper *Parthenocissus quinquefolia*

Groundcover

Aztec Grass *Ophiopogon japonicus*
Frogfruit *Phyla incisa*
Horseherb *Calyptocarpus vialis*
Leadwort Plumbago *Ceratostigma plumbaginoides*
Liriope *Liriope muscari*
Monkey Grass (Mondo Grass) *Ophiopogon japonicus*
Oregano *Origanum vulgare*
Periwinkle, Littleleaf *Vinca minor*
Pigeonberry *Rivina humilis*
Purple Heart *Secreasea pallida*
Santolina (Lavender Cotton) *Santolina chamaecyparissus*
Sedge, Berkeley *Carex tumulicola*
Sedge, Meadow *Carex perdentata*
Sedge, Texas *Carex texensis*
Sedum (Stonedrop) *Sedum nuttallianum*
Silver Ponyfoot *Dichondra argentea*
Wooly Stemodia *Stemodia lanata (Stemodia tomentosa)*

Turf Grasses

Bermuda *'Tif 419', 'Sahara', 'Baby', 'Common'*
Buffalo *'609', 'Stampede', 'Prairie'*
St. Augustine *'Baby', 'Common', 'Raleigh', 'Delmar'*
Zoysia, Fine Leaf *'Matrella', 'Emerald', 'Zorro'*
Zoysia, Coarse Leaf *'Japonica', 'Jamur', 'El Toro', 'Palis*

Invasive Species/Problem Plants

PLANTS TO AVOID

INVASIVES
(Plants that are non-native to the Central Texas ecosystem and tend to out-compete native species)

Do Not Plant
(Travel by seeds, berries, and spores so can be transported long distances. They have already invaded preserves and greenbelts):

- Arizona Ash
- Chinaberry
- Chinese Pistache
- Chinese Tallow
- Chinese Privet
- Elephant Ear
- Holly Fern
- Japanese Honeysuckle
- Ligustrum, Wax Leaf
- Mimosa
- Mulberry, Paper
- Nandina (large, berrying varieties)
- Photinia, Chinese
- Pyracantha
- Tamarisk
- Tree of Heaven

Do Not Plant Near Parks/Preserves/Greenbelts
(travel by runners, rhizomes, and stems so only invade neighboring areas):

- Bamboo
- English Ivy
- Vinca (Periwinkle)

PROBLEM TREES AND SHRUBS
(Typically fast-growing, highly adaptable, but often have weak wood and are short-lived. Most are susceptible to insect and disease problems.)

- Arizona Ash
- Azalea (not adapted to Austin soils)
- Boxelder
- Camellia
- Chinaberry
- Chinese Privet
- Chinese Tallow
- Cottonwood
- Ligustrum
- Lombardy Poplar
- Mimosa
- Mulberry, Paper
- Photinia, Chinese
- Siberian Elm
- Silver Maple
- Sweetgum
- Sycamore
- Tree of Heaven

ATTACHMENT 10:
SMART HOUSING

City of Austin

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

Neighborhood Housing and Community Development Department

January 29, 2014

S.M.A.R.T. Housing Certification
Foundation Communities- Southwest Trails Phase II- 8500 Highway 71 West
(id #65635)

TO WHOM IT MAY CONCERN:

Foundation Communities (development contact:: Jennifer Hicks: 512-610-4025; jennifer.hicks@foundcom.org) has submitted a S.M.A.R.T. Housing application for the construction of a **60 unit multi-family** development at **8500 Highway 71. The project will be known as Southwest Trails Phase II.** The project will be subject to a five (5) year affordability period after issuance of certificate of occupancy.

NHCD certifies that the proposed construction meets the S.M.A.R.T. Housing standards at the pre-submittal stage. Since **100%** of the units (60 units) will serve households at or below **50%** Median Family Income (MFI), the development will be eligible for **100%** waiver of the fees listed in Exhibit A of the S.M.A.R.T. Housing Resolution adopted by the City Council. The expected fee waivers include, but are not limited to, the following fees:

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

In addition, the development must:

- Pass a final inspection and obtain a signed Final Approval from the Green Building Program. (Separate from any other inspections required by the City of Austin or Austin Energy. Contact Katherine Murray 512-482-5351).
- Pass a final inspection to certify that accessibility standards have been met.

The applicant must demonstrate compliance with the reasonably-priced standard after the completion of the units, or repay the City of Austin in full the fees waived for this S.M.A.R.T. Housing certification.

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

Javier V. Delgado
Neighborhood Housing and Community Development

Cc:	Laurie Shaw, Capital Metro	Bryan Bomer, AEGB	Alma Molieri, PDRD
	Maureen Meredith, PDRD	Gina Copic, NHCD	Susan Kinel, NHCD
	M. Simmons Smith, PDRD	Chris Yanez, PARD	Stephen Castleberry, PDRD
	Kath. Murry, Austin Energy	Heidi Kasper, AEGB	A. Linseiesen, PDRD
	Robby McArthur, AWU	Danny McNabb, WPDR	Cande Coward, PDRD

ATTACHMENT 11:
DEVELOPMENT RESUME

Creating Housing Where Families Succeed

FOUNDATION COMMUNITIES

creating housing where families succeed

Development Resume

Foundation Communities, Inc.
Developer

January 2014

A Description of the Scope and Nature of Development Experience

FC is a well-respected non-profit developer and long-term owner of 1,982 units of affordable rental housing in Austin. FC has developed a range of housing including scattered site duplexes, multifamily housing with incorporated green space, and mid-rise, higher-density housing for single adults.

About Foundation Communities, Inc.

Foundation Communities' (FC) mission is to create housing where families succeed. We are a nationally-recognized nonprofit organization that empowers low- and moderate- income families to succeed through quality affordable housing and tools to increase their educational and economic standing. Foundation Communities works in four focus areas:

* Opening Doors to Homes -- We own and manage 2,673 units across 17 properties -- 14 in Austin, and three in the Dallas/Fort Worth area -- providing quality homes for more than 2,500 low income families and individuals.

* Helping the Homeless -- Our 465 permanent supportive housing units allow single adults who have been homeless, are on fixed incomes, or who have chronic health problems and disabilities to reach their maximum level of self-sufficiency. The 111 units in our Children's HOME Initiative program provide reduced rents and case management support to help fragile families move from crisis and instability to long-term self-sustainability.

* Learning in a Community -- Through strategic partnerships, in 2011-12 we will give 800 children of working parents a safe place to go when school's out right where they live, helping 85% of students maintain or improve grades. Talented volunteers help us increase adults' earning potential through classes in English as a Second Language and computer skills, as well as employment counseling and social service referrals.

* Saving for the Future -- Each year, we empower more than 300 families to become smart consumers through economic education and one-on-one financial coaching; at least 50% of them reduce their debt. More than 224 families have earned a 2-to-1 match in special savings accounts to purchase a home, attend college, or start a business. We also provide free income tax preparation for 17,000 low income workers and retirees with the help of more than 600 IRS-certified volunteers; this is vitally important to low-income workers. By utilizing this free service, low-income clients can claim all of the tax credits for which they qualify while avoiding costly commercial tax preparation fees and predatory loans.

Recent Development Experience:

Development Name: M Station
Development Location: 2906 E. Martin Luther King Blvd., Austin, TX 78702

Owner Name and Contact: M Station Housing, LP (FC is sole managing member of GP)
Walter Moreau, walter.moreau@foundcom.org, (512) 610-4016

Income Mix:

15 units – < 30% MFI
75 units – < 50% MFI
45 units - < 60% MFI
15 units – < 80% MF (market units)
TOTAL UNITS: 150

Description:

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

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

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

M Station Timeline:

Letter of Intent	December 2008
LIHTC Application	March 2009
LIHTC Award Notification	September 2009
Acquisition	November 2009
LIHTC Commitment	December 2009

Start of Construction	June 2010
Construction Completion	October 2011

M Station Development Budget:

Uses

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

Sources

9% LIHTC Equity	$13,496,733 (Bank of America as syndicator)
Perm Loan	$4,000,000 (Bank of America)
City of Austin GO Bonds	$2,000,000
FHLB Bank of San Francisco	$1,500,00
NeighborWorks America	$1,250,000
Austin Community Foundation	$500,000
Energy Rebates	$189,000
Home Depot Foundation	$75,000
Enterprise Green Communities	$50,000
Enterprise Carbon Offset Fund	$45,788
FC Reserves	$890,212
Deferred Developer Fee	$1,351,397
TOTAL SOURCES:	**$25,348,130**

Experience in Development of Mixed Finance Low-Income Housing

Address	# of Units	New or Rehab	Type	Year Completed	Income Mix
Arbor Terrace 2501 S. IH 35, Austin, 78741	120	Rehab	SRO	2012	90 units – 30% MFI 30 units – 50% MFI
Buckingham Place 743-B Yarsa, Austin, 78748	164	Rehab	Duplexes	1991	83 units – 50% MFI 83 units – 80% MFI
Capital Studios 309 E. 11th Street Austin, TX 78701	135	New	SRO	2014 – Under construction	27 units – 30% MFI 27 units – 40% MFI 81 units – 50% MFI
Cherry Creek 5510-B Fernview, Austin, 78745	122	Rehab	Duplexes	1989	37 units – 50% MFI 85 units -80% MFI
Crossroads 8801 McCann, Austin, 78757	92	Rehab	Apts	1990	14 units – 30% MFI 31 units – 50% MFI 47 units – 80% MFI
Daffodil 6009 Daffodil, Austin, 78744	40	Rehab	Apts	1996	10 units – 30% MFI 30 units – 50% MFI 30 units – 80% MFI
Garden Terrace 1015 W. William Cannon, Austin, 78745	103	Rehab	SRO	2003 and 2008	35 units – 30% MFI 65 units – 50% MFI 3 units - UR
Homestead Oaks 3226 W. Slaughter Lane Austin, TX 78748	140	New	Apts	2015 – under construction	14 units – 30% MFI 70 units – 50% MFI 42 units – 60% MFI 14 units - MKT
M Station 2906 E. MLK, Austin, 78702	150	New	Apts	2011	15 units – 30% MFI 75 units=50% MFI 45 units=60% MFI 15 units - MKT
Peters Colony 1810 E. Peters Colony Rd, Carrollton 75007	160	Rehab	Apts	1995	15 units=30% MFI 50 units=50% MFI 48 units=80% MFI 8 units=UR
Shadow Brook 2020 S. Cooper, Arlington, 76013	403	Rehab	Apts	1995	201 units=50% MFI 202 units=80% MFI
Sierra Ridge 201 W. St. Elmo, Austin, 78745	149	Rehab	Apts	1991	15 units=30% MFI 128 units=50% MFI 6 units=80% MFI
Sierra Vista 4320 S. Congress Ave., Austin, 78745	238	Rehab	Apts	2012	24 units=30% MFI 166 units=50% MFI 48 units=60% MFI
Sleepy Hollow 3903 Ichabod Cr, Arlington, 76013	128	Rehab	Apts	1995	64 units=50% MFI 64 units=80% MFI

Southwest Trails 8405 Old Bee Caves Rd., Austin, 78735	160	New	Apts	2001	96 units=50% MFI 64 units=60% MFI
Spring Terrace 7101 N. I-35, Austin, TX 78752	142	Rehab	SRO	2006	14 units=30% MFI 126 units=50% MFI 2 units=UR
Skyline Terrace 1212 W. Ben White. Austin, 78704	100	Rehab	SRO	2008	72 units=30% MFI 28 units=40% MFI
Trails at the Park 815 W. Slaughter Ln, Austin, 78748	200	New	Apts	2000	46 units=50% MFI 104 units=60% MFI 50 units=80% MFI
Vintage Creek 7224 Northeast Dr, Austin, 78723	200	Rehab	Apts	2000	23 units=50% MFI 57 units=60% MFI 120 units=80% MFI
TOTAL UNITS	**2,948**				

Green Building Certification Experience

As the largest nonprofit affordable housing developer/owner in Austin, Foundation Communities (FC) has been committed to green building principles since 2000. We know that green building makes sense for affordable housing because by reducing our own operations costs, we can keep rents low and fund vital services such as on-site after-school programs and free citywide tax preparation. As owner of 17 real estate properties, FC spends $1.3 million per year on water and energy costs. These costs increase about 10% per year, so finding ways to reduce our energy impact is crucial for efficient operations. Committing to green building and energy efficiency also has a significant effect on the budgets of our residents who pay their own bills at our family apartment communities. Lower utility bills can mean more money to pay off debt, invest in education, finance childcare or transportation to work, or save for the future.

Foundation Communities engages a comprehensive green building and green initiatives approach that made it possible for us to offset 9,600 CO2 emissions last year; which is equivalent to removing the emissions of 817 average homes in the United States.

We have invested in the following green capital improvements at our existing multifamily properties:

- Replaced toilets with low-flow flapper-less models
- Installed low-flow fixtures in bathrooms and kitchens
- Replaced incandescent bulbs with compact fluorescent bulbs
- Installed programmable thermostats in all residential units
- Increased attic insulation to R-38 at five of eight properties
- Five properties qualified and participated in Austin Energy Duct Sealing program
- Installation of solar screens to reduce heat gain
- Installed ceiling fans in all applicable spaces in residential units
- All appliances are being replaced by Energy Star units
- All new HVAC units are 14 SEER if applicable
- Basic weatherization and water conservation are checked during make-readies (preparing new units for residents)
- Using only low VOC paints and adhesives for make readies and all new construction projects
- Replacing carpet on the first floor apartments with ceramic tile
- Contracting green cleaning contractors for SRO (single resident occupancy) properties
- Utilize Green pest management contractors at our properties

- With the help of community groups, we have planted additional trees at our properties
- Community gardens at four properties
- High-performance windows
- Sensors and dimmers minimize artificial lighting use during daylight
- Track our utility monthly to follow trends and identify problems proactively

Through investments in renewable energy, energy management and water conservation we work towards reducing our ecological footprint.

- All house utility accounts are invested in 100 percent renewable energy (solar or wind)
- Foundation Communities is one of the largest private producers of solar energy in central Texas
- Producing 107,000 kWh annually, our panels generate on average five percent of energy we use and power 10 average single family homes for a year
- Approximately 50% of the energy to heat hot water at Spring Terrace and Skyline Terrace is produced by the sun with solar hot water arrays.
- Water-wise landscaping (at some locations)
- Rainwater harvesting
- Track our water usage monthly to identify problems proactively

We also proactively work to educate our property management and maintenance staff and residents on green practices:

- We conduct trainings for maintenance staff
- Distribute monthly newsletters that include "Green Tips"
- Sustainability Reports are provided and reviewed with property management every year
- Our Saving Green Program, educates residents how to save money through conservation
- We prepare green capital improvement plans on each property annually.

M Station, our greenest development constructed to date and completed in 2011, earned a LEED Platinum rating for its energy efficient and transit oriented features and its score actually qualifies the project as one of the greenest apartment complexes in the United States. The following green features were incorporated into the design and development of M Station:

- Grayfield redevelopment of old concrete manufacturing storage lot.
- Located is richest public transit neighborhood in Austin with nearby access to multiple major bus lines and less than a ¼-mile from commuter rail stop.
- Produced building mockup section to be sure all trades understand the green and durable construction techniques including window details, flashing, and envelope penetrations.
- Highly efficient elevator reduces energy usage, maintenance costs and hundreds of gallons of hydraulic oil.
- Structural slab utilizes 30% flyash in place of concrete which dramatically reduces energy in production and diverts land-fill bound material.
- Provide dedicated parking spots for Car2Go .
- Developed internal and edge sidewalks and bikeways as promenades that connect to existing neighborhood sidewalks. A pedestrian bridge over Boggy Creek connects M Station to neighborhood to promote exercise and walking.
- Provides ample covered bike racks at key locations throughout the site.
- Fully accessible design throughout facility.
- 100% of planted landscape utilizes native and adapted species. All drought-tolerant.
- All non-turf landscape irrigated using sub-surface drip irrigation.
- All very low flow water fixtures.
- 100% of building roof stormwater runoff collected and re-irrigated onsite.

- 100% of lighting fixtures are Energy Star rated.
- Exterior site lighting connected to timer and light sensors and use full-cutoff fixtures to minimize light pollution.
- Metal reflective roof for durability and radiant barrier.
- Fully sealed to prevent air leakage to exterior.
- Insulated using affordable hybrid insulation strategy (foam + spray fiberglass).
- Insulative glazing with excellent low-E films and shading overhangs.
- Extremely efficient, centralized, inverter-driven variable refrigerant flow HVAC (Mitsubishi CityMulti).
- 88% construction waste reduction/recycling goal.
- Permeable concrete used for all walking and biking paths.
- Low-VOC paints, sealants, and adhesives.
- No added formaldehyde in engineered wood or insulation.
- Bathrooms, dryers and kitchen hoods all vented to exterior.
- Fresh-air intakes balanced to provide ample fresh air without unduly loading HVAC
- Integrated pest management strategy improves long-term durability and eliminates need for pesticides, herbicides.
- MERV 8 filters on HVAC to improve indoor air quality and reduce asthma and allergy triggers.
- Commissioning and testing of all systems to be sure all function properly.
- No smoking allowed within 25 feet of units.

Foundation Communities' green partners include:
Austin Energy Green Building - We have participated in several Austin Energy programs including: GreenChoice® Energy, Austin Energy Green Building Rating System, Commercial rebate programs for solar, insulation, solar screens; in addition, several of our properties have benefited from the free duct-sealing program and the Low Income Weatherization.

Energy Star Partner - Foundation Communities is proud to be an Energy Star® Partner. Through this partnership our building manager can "measure," "rate," or "benchmark" a facility's energy use by using the EPA's National Building Performance Rating System. In addition, we have access to online Energy Star resources that assist us in achieving our "green" initiatives.

Enterprise Green Communities - Foundation Communities has been the recipient of five Green Communities Green Building awards that have helped us push the green building envelope in our projects in the last five years. The Enterprise Foundation has successfully laid the groundwork for green building in affordable housing on a nation-wide scale for the last seven years.

List of Green Certifications:
Spring Terrace (rehab) – Green Communities Certified
Skyline Terrace (rehab– Green Communities Certified
M Station – LEED-H Platinum Rating, Green Communities Certified and 5-Star Austin Energy Green Building rating
Sierra Vista – Green Communities Certified and 1-Star Austin Energy Green Building rating (S.M.A.R.T. Housing now requires all rehabs to score at least 1-Star Austin Energy Green Building rating)
Arbor Terrace – Green Communities Certified and 4-Star Austin Energy Green Building rating (highest rated MF rehab in Austin)

Community Engagement
Foundation Communities believes the key to a project's true success is the support and engagement of the surrounding neighborhood and stakeholders. The first step in pursuing any new development is to

approach the neighborhood and talk to key stakeholders about the project, target population and show examples of our projects. We have had some neighborhood challenges with true "Not In My Backyard Opposition" but have always been able to overcome and ultimately receive the support of the neighborhood. Listed below are the most recent development projects and the neighborhoods engaged and from whom we received votes of support:

Capital Studios:	Downtown Austin Neighborhood Association
	Downtown Austin Alliance
Sierra Vista:	South Congress Combined Neighborhood Planning Area
M Station:	Austin Heights Neighborhood Association
	Rosewood Neighborhood Planning Contact Team
	McKinley Heights Neighborhood Association
	Chestnut Neighborhood Association
	Cherrywood Neighborhood Association
Skyline Terrace:	South Lamar Neighborhood Association
	Southwood Neighborhood Association
Spring Terrace:	St. Johns Neighborhood Association

Knowledge of Real Estate Financing Methods

Foundation Communities, Inc. has experience utilizing all funding tools available for the development of affordable multifamily housing. We have an excellent track record of securing funding in competitive allocations such as the 9% LIHTC and the Federal Home Loan Bank Affordable Housing Program. We also have solid relationships with multiple lenders.

LIHTCs and BONDS

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

City of Austin RHDA

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

Private Mortgages

Foundation Communities has excellent relationships with several lenders that allow for competitive rates and pricing. We currently have private mortgages with Compass Bank, Bank of America, Wells Fargo and Greater Texas Federal Credit Union. While we have great relationships with these and many other conventional lenders, we have a fiduciary duty to bid out our finance opportunities, and we've always found this to end up with the best rate and terms.

Private Fundraising

Foundation Communities employs a diverse fundraising strategy. In 2012, private fundraising totaled over $3,000,000 (not including capital funding from City of Austin). Foundation and corporate grants range from $3000 to hundreds of thousands of dollars, and fund both capital projects and FC's wide range of programs (education, supportive housing, etc.). For individual donations, we use the Benevon model, culminating in an annual A Place to Call Home fundraising luncheon. This year's luncheon was attended by 750 invited guests, and raised more than $800,000. We have applied for and received eight awards through the FHLB Affordable Housing Program and received the highest funding amount awarded for our M Station property of $1,500,000.

Completed Projects in Past 10 Years:

Year Funding Completed	Project Name	Funding Tools
2014	Homestead Oaks	9% LIHTC, City of Austin RHDA Program, HUD 221(d)(4) loan, FHLB AHP, NeighborWorks America, Private Fundraising
2012	Capital Studios	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Enterprise Green Communities, NeighborWorks America, Private Fundraising
2011	Arbor Terrace	Neighborhood Stabilization Program via TDHCA, City of Austin RHDA Program, FHLB Atlanta, NeighborWorks America
2010	Sierra Vista	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, NeighborWorks America, Private Fundraising, Permanent Mortgage with Impact Capital via Bank of America
2009	M Station	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Enterprise Green Communities, NeighborWorks America, Private Fundraising, Permanent Mortgage with Impact Capital via Bank of America
2006	Skyline Terrace	9% LIHTC, City of Austin RHDA, TDHCA HOME, FHLB San Francisco, NeighborWorks America, Enterprise Green Communities, Private Fundraising
2005	Spring Terrace	City of Austin RHDA, TDHCA HOME and HTF, FHLB Dallas, NeighborWorks America, Enterprise Green Communities, Private Fundraising

WALTER J. MOREAU

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

PROFESSIONAL EXPERIENCE:

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

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

Development

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

Asset and Property Management

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

Resident Services

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

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

DEVELOPMENT & ASSET MANAGEMENT DIRECTOR, Foundation Communities 1994 – 1996

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

PRIVATE CONSULTANT 1992 – 1994

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

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

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

MANAGEMENT TRAINEE, United Way of America 1989 – 1990

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

EDUCATION:

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

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

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

PERSONAL INFORMATION:

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

Sunshine Mathon

M. Arch. First Professional, Specialization in Sustainable Design

07.20.2007

References available upon request.

Profile

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

Experience

Systems & Construction Manager, UT Solar Decathlon 2005; Austin, TX – 2004-2005
Core member of the 2005 UT Solar Decathlon Team. I led the design and construction of the solar electric and solar thermal, plumbing, and HVAC systems for which we won two first place honors. Responsible for overall building energy analysis. Central researcher of sustainable materials, energy efficient appliances, and overall green building strategies. Onsite Construction Manager throughout all construction phases. For more information on the competition see: www.solardecathlon.org.

Computer Lab Teaching Assistant, UT Austin; Austin, TX – 2005-2007
Senior staff member of UT School of Architecture's Computer Lab. Oversaw the maintenance of the lab computers, both PC and Apple. Assisted and taught students with software questions including AutoCAD, Adobe Photoshop, Sketchup, Vectorworks.

Director, Farm & Wilderness Summer Camps; Plymouth, VT – 2000-2003
Created and organized dynamic program of outdoor skills and experiential environmental education for forty 11-15 year old boys in a remote setting. Responsible for hiring and managing seventeen staff. Accountable to multiple constituencies: campers, parents, staff and organization. Managed a seasonal $65,000 budget.

Senior Computer Sales Consultant, Power Mac Pac; Portland, OR – 1998-2002
Apple Macintosh sales consultant with individual and corporate clients, both local and nationwide. Set company single month sales record of $250,000.

Photographer, Third Iris Photography; Portland, OR – 2001-2003
Third Iris Photography was a self-run business. I was a freelance photographer with a focus on landscape, travel and detail art images.

Education

Bates College, Lewiston, ME – B.S. Physics, 1995; Magna Cum Laude.
University of Texas at Austin, Austin, TX – M. Arch, First Professional, 2007; GPA: 3.8.
University of Texas at Austin, Austin, TX – Specialization in Sustainable Design, 2007.
UT Honors – Graduate Recruitment Fellowship; Texas Architectural Foundation Scholarship.

Skills

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

RESUME

Vicki Beal McDonald

Education: Bachelor of Science. University of Texas at Austin 1980
Professional Designation: Member: Certified Commercial Investment Institute (CCIM)
Licenses: Licensed Texas Real Estate Broker

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

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

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

Awards:
Commercial Investment Division Member of the Year

Jennifer Daughtrey Hicks

EDUCATION

Master of Public Affairs, May 2002
LBJ School of Public Affairs, Austin, Texas
- Research Project: "State Sprawl & Open Space"
- Master's Report: "Reinventing S.R.O.'s: Homes for the Single, Working Poor"

B.A. in Journalism, May 1999
Texas Tech University, Lubbock, Texas
- Texas Valedictorian Scholarship
- Hutcheson Endowed Journalism Scholarship

SUMMARY

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

PROFESSIONAL EXPERIENCE

Director of Housing Finance
Foundation Communities, Inc., Austin, Texas **May 2002 – present**
- Identify subsidy and conventional financing options for projects – to date have secured grants and loans from public and private sources ($121 million) for the acquisition and rehabilitation of eight communities (1,128 units) and two learning centers.
- Find projects that fit available funding and development goals.
- Coordinate preparation and completion of funding applications including LIHTC, HOME, CDBG, FHLB, and HUD.
- Review closing documents and coordinate closing process for development projects.
- Plan development criteria and assist with evaluation and negotiation of potential development projects.
- Outline compliance regulations, ensure proper procurement, and act as point of contact for Davis Bacon wage reporting.
- Maintain compliance with tax exemption and CHDO requirements for 18 property portfolio.

Development Associate **Sep. 2001 – May 2002**
Foundation Communities, Inc., Austin, Texas
- Assisted with a variety of funding applications for the development of affordable multi-family housing.
- Planned the financing, design, and management of first single room occupancy project in Austin.
- Identified and initiated negotiation on suitable properties for acquisition.

Linenberger Memorial Intern in City Management **June 2001 – Aug. 2001**
Office of City Manager, San Mateo, California
- Wrote bi-weekly newsletter to employees, monthly newsletter to the community and City's Annual Report.
- Monitored city operations and reported progress to city staff and community through newsletters and press releases.

State Affairs Assistant **Aug. 1999 – May 2001**
American Insurance Association, Austin, Texas
- Researched, tracked, and monitored House and Senate insurance-related bills for an eight state region.
- Composed legislative and regulatory updates, reports, calendars and press releases for distribution to Association members.

Public Relations Director **May 1999-Aug. 1999**
Office of the Governor, Criminal Justice Division/Task Force Division, Austin, Texas
- Wrote and produced press releases, presentation scripts, grant reports and agency memorandums for department initiatives.
- Monitored statewide task force activities and reported to CJD executive staff.

Communication Fellow **May 1999-Aug. 1999**
Office of the Governor, Austin, Texas
- Scanned national media sources and compiled daily packet of articles on Governor's initiatives and activities.
- Interviewed, trained and supervised new interns.

News Room Reporter **Jan. 1999 - May 1999**
Lubbock Avalanche-Journal, Lubbock, Texas
- Generated story ideas, interviewed sources and wrote articles on local events.

John D. Guttman

[redacted]

[redacted]

john.guttman@foundcom.org

EDUCATION

Clemson University, Clemson SC May 2011
Master of Real Estate Development

University of Texas at Austin December 2005
Bachelor of Arts in Urban Studies
Minor in Architectural Studies
Thesis: *Mixed-Use Development: A Solution For Growth*

ACADEMIC HONORS

Alpha Sigma Gamma International Real Estate Honorary Society

- Recognizes outstanding achievement in scholarship by real estate students at the university level

ACADEMIC PROJECTS

ARGUS Software University Challenge Spring 2011

- Competed on a team of four against 22 national and international universities in a case study competition using ARGUS DCF to determine the feasibility of the given case study
- Primarily responsible for analyzing data, determining assumptions, and modeling project in ARGUS DCF

Commercial/Residential Practicum Spring 2011

- Competed on a team of five to provide a development proposal for a 180-acre contiguous site in central Columbia, South Carolina
- Worked within a team to complete a market analysis, site analysis, site plan, pro forma, and development proposal
- Predominantly responsible for the financial analysis of the four phases of the groups proposal

WORK EXPERIENCE

Foundation Communities Austin, TX
Real Estate Project Manager October 2012 - Present

- Sources projects that fit available funding and development goals
- Assess financial feasibility of potential development projects
- Work in tandem with the Director of Housing Finance to prepare and complete funding applications including LIHTC, FHLB, and HUD in the amount of $12.7 million to date.

American Campus Communities Austin, TX
Investment Analyst September 2011 – October 2012

- Perform financial modeling and preliminary due diligence for over 35 potential acquisitions and developments with valuations as great as $170 million, including projects in multiple national markets
- Generate sensitivity analyses to identify impacts on IRR and debt coverage ratios, adjusting factors such as development costs, operating expenses, rental rates, and financing vehicles
- Investigate preliminary permit fee, impact fee, utility cost, and taxes through contact with local offices and officials

Foundation Communities Austin, TX
Development Intern May 2010 – August 2010

- Utilized Excel to compile and analyze historic operating income and expense figures from 1991 to 2009 for Foundation Communities' portfolio of 14 existing properties
- Completed financial feasibility studies for future Foundation Communities' acquisitions
- Performed a weighted property valuation using the income, replacement cost, and market approaches to value a property

Southwest Housing Compliance Corporation Austin, TX
Financial Analyst April 2008 – July 2009

- Evaluated annual operating budgets and set annual rent adjustments for a portfolio of 70 properties.

TRACS Data Analyst November 2006 – April 2008

- Acted in a customer service roll in a effort to coordinated and audited monthly rental subsidy requested for a portfolio of 70 properties

COMPETENCIES

- Microsoft Excel, Word, PowerPoint, and Project
- Site To Do Business, CoStar, and ARGUS DCF certified
- Strong research skills and ability to interpret government regulations

Aubrie Christensen

[redacted]

Education

May, 2014 (expected) Masters of Science in Community and Regional Planning - University of Texas, TX

2011 Bachelors of Arts in Sustainability Studies – The Evergreen State College, WA

Work Experience

2013-Present BabyGoods, Austin, TX

Owner of custom cloth diaper business. Responsibilities include product design, manufacturing, promotion and sales of product.

2012-2013 Equitable Green Group, Austin, TX

Responsibilities included organizing community outreach and education, and bookkeeping.

2005-2010 Nash's Organic Produce, Sequim, WA

Responsibilities included irrigation of 400 acre vegetable farm, market sales, retail store sales, graphic arts work and general farm labor.

Volunteer and other experience

2014 Current Volunteer: Downtown Commission/Park Board Joint Workgroup on Public Space, Austin, TX

Team member of workgroup to address public space issues in Austin.

2014 Current Volunteer: Blackland Community Development Corporation, Austin, TX

Assisting with designing and building raised wicking beds and a composting system.

2014 Current Volunteer: FarmShare, Austin, TX

Assisting with feasibility study, site analysis and site planning of new non-profit farmer education program.

2011 Alley revitalization project, Olympia, WA

Responsibilities included working with a team of students and various stakeholders including city departments, business owners, and residents to revitalize an alley in downtown Olympia using green design strategies that addressed social, ecological and economic sustainability.

2005-2007 Volunteer: Friends of the Fields, Sequim, WA

Responsibilities included fundraising and promoting community education through cooking workshops, benefits, local festivals and community dinners.

ATTACHMENT 12:

GOOD NEIGHBOR POLICY

ATTACHMENT 6b

City of Austin Good Neighbor Checklist

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

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

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

(1) Preliminary Research

☒ Review the Neighborhood Plan (if applicable)

(2) Neighborhood Notification

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

(3) Pre-Application Engagement

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

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

(4) Application requirements

☒ Provide communications plan

☒ Provide documentation showing the content of the notice, and proof of delivery

☒ Provide signed copy of this checklist.

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

Walter Moreau	WALTER MOREAU	1/27/14
Signed	printed name	date

Southwest Trails Phase II
8500 Highway 71
Austin, TX 78735

Single Point of Contact: Walter Moreau, Executive Director
Foundation Communities, Inc.
3036 S. 1st Street
Austin, TX 78704
(512) 610-4016
walter.moreau@foundcom.org

COMMUNICATIONS PLAN FOR NEIGHBORHOOD ENGAGEMENT

Foundation Communities believes the key to a project's true success is the support and engagement of the surrounding neighborhood and stakeholders. Before any other facets of a development are pursued, Foundation Communities approaches the neighborhood and talks to key stakeholders about the project, target population and shows examples of our projects.

The following steps have been taken to communicate with the neighborhood surrounding the proposed development located at 8500 Highway 71, Austin, TX 78735.

1) **Preliminary Research:**
   - December 2013 – Using the City of Austin's GIS mapping site, FC development staff researched the neighborhood organizations that contain or border the proposed site. We also confirmed the site was located in the *Oak Hill Combined Neighborhood Plan.*
   - December 16, 2013 – FC Development Staff communicated with Carol Gibbs, City of Austin Neighborhood Advisor, to confirm the neighborhood organizations that should be contacted.
   - FC Development staff read through the *Oak Hill Combined Neighborhood Plan* and familiarized ourselves with the Future Land Use Map.
   - We determined that the site is located within the Oak Hill Association of Neighborhood boundaries, but not within any other neighborhood or property association boundary.
2) **Neighborhood Contact:** Foundation Communities believes it is important to make personal contact with the priority neighborhood organizations before a letter notification is received by the organizations.
   - December 13, 2013 - Walter Moreau called Jim Schissler, Chair of the Oak Hill Association of Neighborhoods. Walter explained the proposed project and asked if he could come speak to the neighborhood association. We were scheduled on the OHAN meeting agenda for January 8, 2014.
   - December 13, 2013 – Walter Moreau called Eli Del Angel, the president of the Covered Bridge Property Owners Association. Heard back from Frank Goodlow on January 21, 2014 and were invited to their meeting that evening.
   - January 9, 2014 – A cover story on Southwest Trails Phase II ran in the *Oak Hill Gazette*. (Attached.)
3) **Neighborhood Notification:**
   - The following neighborhoods were sent a public notification of the proposed Southwest Trails Phase II project per the 2014 Qualified Allocation Plan which governs the LIHTC program administered by the Texas Department of Housing and Community Affairs:
     - Oak Hill Association of Neighborhoods

- Covered Bridge Property Owners Association, Inc.
- Oak Hill Neighborhood Plan – COA Liaison
- Oak Hill Neighborhood Plan Contact Team
- Oak Hill Trails Association
- Thomas Springs Alliance

Please see attached notification letter that was sent to all organizations above and proof of mailing.

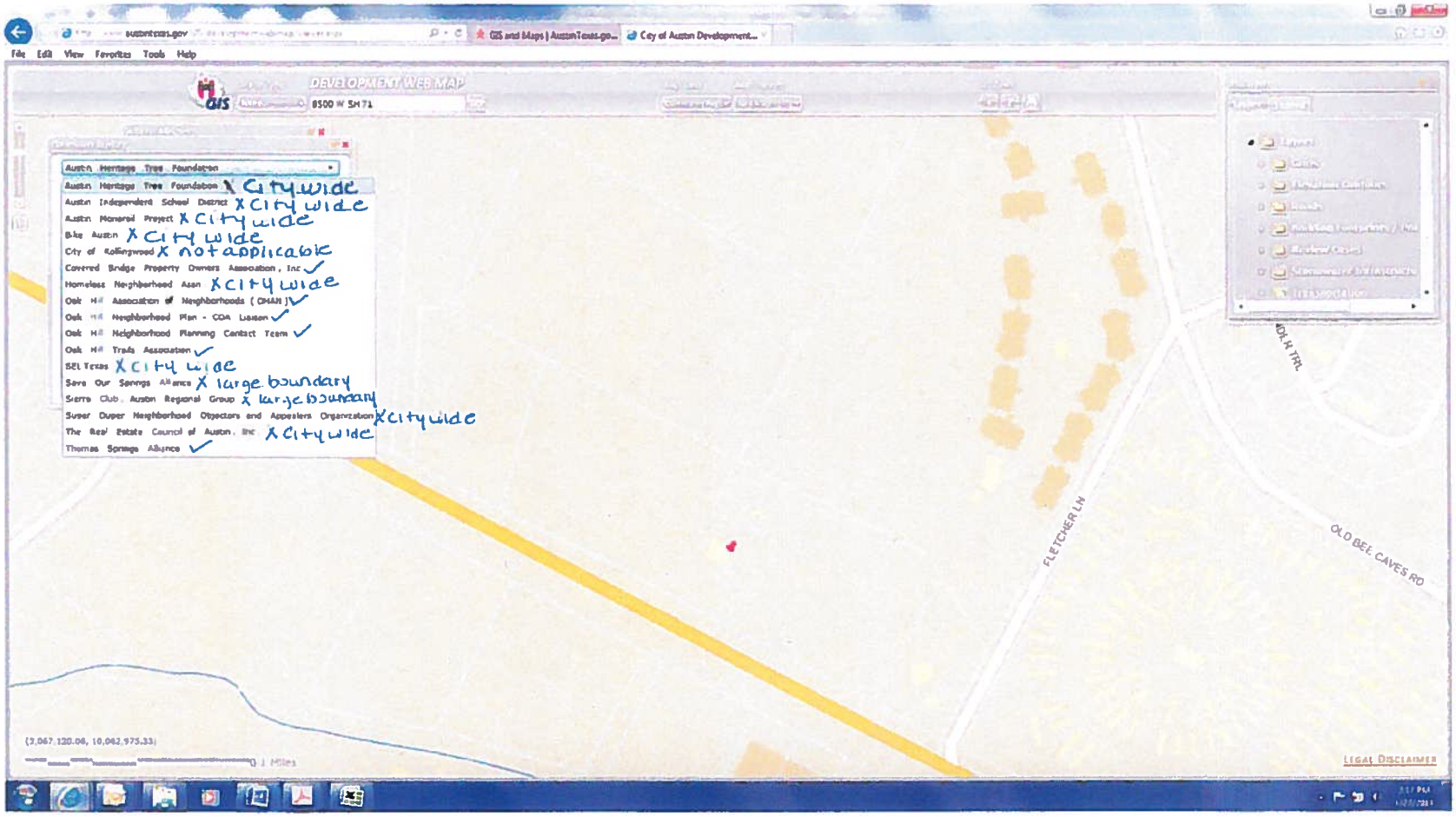
- Owners within 500 ft of Site - The proposed site already has an active zoning application that was filed by the seller of the property (attached.) Notification of the pending zoning application has been completed. Please see attached documentation from City of Austin Development Assistance Center showing that notifications have already been made.

4) **Neighborhood Engagement –** At each of our meetings with the neighborhood, Foundation Communities presents information about our organization, plans for design of the building (architect is usually present at meeting) and we talk about who will live at the property and what services will be offered. We usually invite one of our residents to speak when necessary. We also invite neighborhood members to visit our existing portfolio of properties.
   - January 8 – Attended OHAN Meeting and presented information on the project. A copy of the brochure provided to neighborhood members is attached.
   - January 21, 2014 – Attended Covered Bridge Neighborhood Association meeting and presented information on the project and handed out brochure.
   - January 28, 2014-Will give tour of our Southwest Trails Phase I property to members of both Covered Bridge and Oak Hill Association of Neighborhoods so neighborhood members can see the quality of our projects for themselves.
   - February 12, 2014 – We will attend Oak Hill Neighborhood Association February meeting to present our project again and ask for a vote of support.
   - We will have a web page on our main website – www.foundcom.org - that will contain the most updated information on the project for easy public dissemination.

5) **Implementation/Ongoing Relations**

Foundation Communities, 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.
- We will invite neighborhood members to participate in services programs being offered at our community.
- We will invite and educate neighborhood members on the many ways to volunteer with Foundation Communities.
- We 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.



Neighborhood Organizations registered for the site per the City of Austin's GIS map viewer.

New affordable housing planned for Southwest Austin

January 9, 2014 // 2 Comments

by Bobbie Jean Sawyer

Foundation Communities, a non-profit organization devoted to providing affordable housing throughout the city, is applying for funds to expand Southwest Trails apartments by 60 units on an eight-acre plot of land between Highway 71 and the current location at 8405 Old Bee Caves Road in Oak Hill.

"We've got land under contract that's adjacent to us," said Walter Moreau, executive director of Foundation Communities. "We're just at the beginning stage so we haven't got our site planning and engineering done."

The Southwest Trails apartments, which were completed in 2001 as the first affordable housing in Southwest Austin, are made up of 160 apartments designated for working families in a $20,000 to $40,000 yearly income range. Rent is about $700 per month for a two-bedroom unit, Moreau said.

"Most of our families are working and everybody pays rent. It's not Section 8 housing. It's not public housing," Moreau said. "We think it's really important to still have some very well-maintained, first class affordable housing that can serve Southwest Austin."

Moreau said Southwest Trails has established itself as an integral part of Oak Hill.

"We really love Oak Hill and we've been part of the community. OHAN (Oak Hill Association of Neighborhoods) supported Southwest Trails 12 years ago, so since we're at the beginning of the process, we really are asking for the neighborhood support again," Moreau said. "We're very proud of our track record. We're not coming into the neighborhood from some place else. We've been here."

Affordable housing has been an issue at the forefront of local politics. In November, Austin residents voted in favor of a $65 million affordable housing bond.

Moreau said the vote is indicative of voters' growing awareness of Austin's housing problem.

"For all of our new developments we've had a funding gap. The bonds have helped to fill that gap," Moreau said. "I think this election voters have had more time and paid attention to see how the housing bonds are spent."

Popular Recent Comments Social

New affordable housing planned for Southwest Austin
January 9, 2014 // 2 Comments

Moreau said due to an increased cost of living and higher property taxes, many working families with household incomes less than $50,000 are getting priced out of the city.

"What we're seeing is hardworking families that can't afford the rent here are giving up on Austin and moving out of the region or moving to the suburbs, which then impacts traffic," Moreau said.

In addition to affordable housing, Foundation Communities also provides onsite tutoring for residents and neighborhood kids through the Learning Center.

Isaac Rosales, coordinator at the Southwest Trails Learning Center, said the facility provides educational assistance to about 48 kindergarten through 5th grade students per week, offering after school homework assistance, reading programs and access to a computer lab.

The Learning Center, which employs six full time staff members, also provides English as a Second Language (ESL) classes for adults. The center offers free childcare for the duration of the classes, which are held from 6:30 p.m. to 8:30 p.m. Monday through Thursday.

Judge Susan Steeg, Travis County Precinct 3 Justice of the Peace and president of the Oak Hill Rotary Club, frequently worked with students at the Learning Center as part of the Rotary Club's literacy outreach efforts.

Steeg said the Southwest Trails Learning Center, which is one of 10 centers operated by Foundation Communities, provides invaluable assistance to working parents, helping families balance work and school.

"A lot of these parents are at work until 6 o'clock and then they have to pick up the kids and make dinner and get them ready for the next day. So I thought it was great for them to have the kids ready with their homework already done for the next day," Steeg said. "Working families have a lot to juggle and this was a way that the kids would be able to complete their homework and be able to get that one-on-one help for subjects that they needed help with."

Rosales said the Learning Center not only provides educational assistance, but also helps ease financial stresses on parents.

"Just in the after school program and the summer program, there's humongous money savings, especially for parents that wouldn't necessarily be able to afford childcare, but they have to have childcare because they have to go to work," Rosales said. "That's a gigantic savings for our families and it also lessens the burden on bill-paying."

Rosales also stocks the apartment community's food pantry with food from the Capital Area Food Bank.

"Hard times unfortunately happen," Rosales said. "When you're having to decide between paying a bill or being able to pay your rent and maybe a couple bags of groceries, we are fortunately able to step in and just let them know—especially if you're in an emergency situation—you can come by once a week to get food."

Foundation Communities has an additional project in the works for Southwest Austin. Moreau said the Homestead Apartments, which will include 140 affordable housing units and a Learning Center, is slated for completion in 2015 and will be located on a 29-acre tract of land near the intersection of Slaughter Lane and Brodie Lane.

For more information on Foundation Communities visit www.foundcom.org.

SHARE

SIMILAR POSTS

Oak Hill Park & Ride is moving temporarily to ACC Pinnacle lo ...
December 4, 2013 // 0 Comments

Final ICRC map gives Oak Hill its own City Council district
November 27, 2013 // 1 Comment

Local sports radio station pitches in to help restore flooded lit ...
November 18, 2013 // 0 Comments

Supporters to rally Sunday at the 'Taco Bell' heritage oak tree
November 16, 2013 // 7 Comments

FOUNDATION COMMUNITIES
creating housing where families succeed

3036 South First Street
Austin, TX 78704

tel: 512 447 2026
fax: 512 447 0288

www.foundcom.org

January 10, 2014

Dr. Elayne Lansford
Thomas Springs Alliance
7107 Thomas Springs Road
Austin, TX 78736

Dear Dr. Lansford,

FC Southwest Trails Housing, LP is making an application for 9% Housing Tax Credits with the Texas Department of Housing and Community Affairs for the Southwest Trails Phase II, located at 8500 Highway 71, Austin, Travis County. This New Construction is an apartment community comprised of approximately 60 units of which 100% will be for low-income tenants.

There will be a public hearing to receive public comment on the proposed development. Information regarding the date, time, and location of that hearing will be disseminated at least 30 days prior to the hearing date on the Department's website at (http://www.tdhca.state.tx.us/multifamily/communities.htm) for competitive HTC applications.

Sincerely,

Representative of FC Southwest Trails Housing, LP
Walter Moreau
Executive Director
Foundation Communities
3036 S. 1st Street
Austin, TX 78704
walter.moreau@foundcom.org

NeighborWorks
CHARTERED MEMBER
a Partner Agency of
United Way
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Dr. Elayne Lansford
Thomas Springs Alliance
7107 Thomas Springs Road
Street, Apt. or PO Box
Austin, TX 78736
City, State

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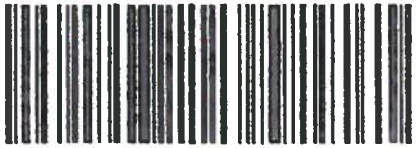

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Thomas Springs Alliance
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Rick Perkins
Oak Hill Association of Neighborhoods
(OHAN)
P.O. Box 90906
Austin, TX 78709

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Rick Perkins
Oak Hill Association of Neighborhoods
(OHAN)
P.O. Box 90906
Austin, TX 78709

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Austin, TX 78704

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Sabrina A. Washburn
Covered Bridge Property Owners Association, Inc.
14050 Summit Drive, #113A
Austin, TX 78728

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Austin, TX 78704

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Brian Reis
Oak Hill Neighborhood Planning Contact Team
6516 Rotan Drive
Austin, TX 78749

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Brian Reis
Oak Hill Neighborhood Planning Contact Team
6516 Rotan Drive
Austin, TX 78749

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Austin, TX 78704

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City, State, Z

Maureen Meredith
Oak Hill Neighborhood Plan – COA
Liaison
P.O. Box 1088
Austin, TX 78767

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FOUNDATION

CERTIFIED MAIL™

60 0001 7582 0406

Maureen Meredith
Oak Hill Neighborhood Plan – COA
Liaison
P.O. Box 1088
Austin, TX 78767

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City, State, ZIP

Rick Perkins
Oak Hill Trails Association
8503 El Rey Blvd.
Austin, TX 78737

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CERTIFIED MAIL™

60 0001 7582 0413

Rick Perkins
Oak Hill Trails Association
8503 El Rey Blvd.
Austin, TX 78737

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JAN 13 2014
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Project Name: Terrace in Oak Hill (formerly called 'West 71 Office Park')

Case Manager: Lee Heckman

Team:

Case Number: C814-2007-0009

Date Filed: Jun 28, 2013

Formal June 28, 2013

Update #: 0

Date Dist: Jul 02, 2013

Comment Due Date: Jul 19, 2013

Discipline	Name
Austin Water Utility Review	Bradley Barron
NPZ Environmental Review	Mike Mcdougal
NPZ Legal Department Review	Janice Collins
NPZ Mapping Review	Mapping Review
NPZ Site Plan Review	Christine Barton-Holmes
NPZ Transportation Review	Shandrian Jarvis
NPZ Comprehensive Planning Review	Kathleen Fox
NPZ Zoning Review	Lee Heckman
NPZ PARD/Planning & Design Review	Chris Yanez
NPZ Drainage Engineering Review	Michael Duval
NPZ Flood Plain Review	Kevin Shunk
Electric Review	David Lambert
Heritage Tree Review	Keith Mars
NPZ Fire Review	Christine Thies

Austin Energy Green Building - Richard Morgan
Environmental Office Chuck Lesnaik
Neighborhood Housing Regina Copic
Zoning Andrew Rivera
Notice Team Debra Sustaita

19

Report run on: 7/1/2013

TO:

FROM: SITE PLAN REVIEW DIVISION CASE #: C814-2007-0009

TYPE/SUBTYP Planned Unit Development (PUD)/Land Plan Amendment

PROJECT: Terrace in Oak Hill (formerly called 'West 71 Office Park')

LOCATION: 8500 W SH 71

CASE MANAGER: Lee Heckman PHONE: 512-974-7604

FILED FOR UPDATE: Jun 28, 2013 COMMENT DUE DATE Jul 19, 2013

TENTATIVE PC DATE: REPORT DATE:

TENTATIVE CC DATE:

LANDUSE:

AREA: 8.9 ACRES (SQ FT) LOTS

EXISTING ZONING: PUD-GO

EXISTING USE:

TRACT	ACRES/SQFT	PROPOSED ZONING	PROPOSED USE
		PUD-MF2	

WATERSHED: Williamson Creek, ,

COUNTY: TRAVIS

JURISDICTIO FULL PURPOSE Full-Purpose

Barton Springs Zone

GRIDS:

WATER: COA

GRIDS:

ELECTRIC: COA

GRIDS:

SEWERAGE: COA

GRIDS:

PROPERTY DESCRIPTION:

PLAT 0402440213

DEED REFERENCE:

VOL./PAGE /

LEGAL DESCRIPTION:

RELATED CASES (if any):

CONTACTS:

SCANNED

Applicant	DOUCET & ASSOCIATES 7401 B HIGHWAY 71 WEST SUITE 160 AUSTIN TX 78735 CONTACT: Ted McConaghy	512-583-2600
Owner	3604 WYLDWOOD ROAD CONTACT: Michael Knepp	512-292-0600
Billed To	KNEPP INCORPORATED 3604 WYLDWOOD RD AUSTIN 78739-4408 CONTACT:	512-292-0600
Billed To	1300 SPYGLASS DR APT 123 AUSTIN TX 78746-7526 CONTACT: Theodore W. McConaghy	512--

SCANNED

Zoning Amendments - Restrictive Covenant, SP Deletion, PUD Amendment, PDA Amendment

APPLICATION FOR ZONING AMENDMENT

#10973254

DEPARTMENTAL USE ONLY

Application Accepted By: Sperez Date: 7/1/13

Case Manager: L Heckman

PROJECT DATA

Amendment to Restrictive Covenant	Yes/No	File No:
Termination of Restrictive Covenant	Yes/No	File No:
Site Plan Deletion/Ordinance Amendment	Yes/No	File No: C814-2007-0009
PDA Amendment	Yes/No	File No:
PUD Amendment	Yes/No	File No: C814-2007-0009

Project Name: The Terrace in Oak Hill (formerly called 'West 71 Office Park')

Project Address (or range): 8500 S.H. 71 West
Austin, TX 78735 Zip:

PROPERTY DESCRIPTION

Subdivision Reference
Name: Approval Date:

Block(s): Lot(s):

Plat Book: Page(s): Document #

Brief Legal Description: A 8.9 acre tract of land, out of the A. Bowles Sur 93, Abs 101, in the City of Austin, the tract more particularly described by metes and bounds in a deed of record in Vol. 1074, Page 178, Deed Records, TC. Tx.

Deed Reference of Deed Conveying the Property to the Present Owner(s):
Volume: Document Numbe Page(s): 2003254026 Sq. Ft.: Acres:

CONTACT INFORMATION

Owner: Michael B. Knepp Signature:

Address: 3604 Wyldwood Rd.

City/State/Zip: Austin, TX 78739 Phone: ( ) 576-4620

Agent: Doucet & Associates, Inc. (Ted McConaghy, MA) Signature:

Address: 7401-B Hwy. 71 W., Ste. 160

City/State/Zip: Austin, TX 78735 Phone: ( ) 426-9326

SCANNED

SUBMITTAL VERIFICATION

My signature attests to the fact that the attached application package is complete and accurate to the best of my knowledge. I understand that proper City staff review of this application is dependent upon the accuracy of the information provided and that any inaccurate or inadequate information provided by me/my firm/etc., may delay the proper review of this application.

PLEASE TYPE OR PRINT NAME BELOW SIGNATURE AND INDICATE FIRM REPRESENTED, IF APPLICABLE

Signature 5-22-13 Date

Ted McConaghy, MA

Name (Typed or Printed)

Doucet & Associates, Inc.

Firm

INSPECTION AUTHORIZATION

As owner or authorized agent, my signature authorizes staff to visit and inspect the property for which this application is being submitted.

PLEASE TYPE OR PRINT NAME BELOW SIGNATURE AND INDICATE FIRM REPRESENTED, IF APPLICABLE

Signature 5-22-13 Date

Ted McConaghy, MA

Name (Typed or Printed)

Doucet & Associates, Inc.

Firm

SCANNED

ZONING

CITY OF AUSTIN
TRAFFIC IMPACT ANALYSIS (TIA) DETERMINATION WORKSHEET

APPLICANT MUST FILL IN WORKSHEET PRIOR TO SUBMITTING FOR TIA DETERMINATION

PROJECT NAME: The Terrace in Oak Hill

LOCATION: 8500 S. H. 71 West

APPLICANT: Doucet & Associates, Inc. (Ted McConaghy) TELEPHONE NO: 512-426-9326

APPLICATION STATUS: DEVELOPMENT ASSESSMENT:_____ ZONING: X SITE PLAN:_____

EXISTING: **FOR OFFICE USE ONLY**

TRACT NUMBER	TRACT ACRES	BLDG SQ.FT.	ZONING	LAND USE	L.T.E CODE	TRIP RATE	TRIPS PER DAY
1	8.9	0	PUD (GO)	Vacant			

PROPOSED **FOR OFFICE USE ONLY**

TRACT NUMBER	TRACT ACRES	BLDG SQ.FT.	ZONING	LAND USE	L.T.E CODE	TRIP RATE	TRIPS PER DAY
1	8.9	56,400	PUD (MF-2)	Multi-Family			505
		59 2-bed units					
		1,900		AA Office			N/A

ABUTTING ROADWAYS **FOR OFFICE USE ONLY**

STREET NAME	PROPOSED ACCESS?	PAVEMENT WIDTH	CLASSIFICATION
S.H. 71 West	Yes		

FOR OFFICE USE ONLY

☐ A traffic impact analysis is required. The consultant preparing the study must meet with a transportation planner to discuss the scope and requirements of the study before beginning the study.

☒ A traffic impact analysis is NOT required. The traffic generated by the proposal does not exceed the thresholds established in the Land Development Code.

☐ The traffic impact analysis has been waived for the following reason: _____

☐ A neighborhood traffic analysis will be performed by the City for this project. The applicant may have to collect existing traffic counts. See a transportation planner for information.

REVIEWED BY: [signature] DATE: 5/28/2013

DISTRIBUTION:
_____FILE _____CAP METRO _____TXDOT _____TRANS. REV. _____TRAVIS CO. _____TRANS DEPT.

TOTALCOPIES:_____

NOTE: A TIA determination must be made prior to submittal of any zoning or site plan application, therefore, this completed and reviewed form MUST ACCOMPANY any subsequent application for the IDENTICAL project. CHANGES to the proposed project will REQUIRE a new TIA determination to be made.

SCANNED

ACKNOWLEDGMENT FORM
CONCERNING
Subdivision Plat Notes, Deed Restrictions, and / or Restrictive Covenants

I, Ted McConaghy, MA have checked for subdivision plat notes, deed notes, deed
(Print name of applicant)

restrictions, and/or restrictive covenants prohibiting certain uses and/or requiring certain development restrictions i.e. land use, height, access, screening etc. on this property, located at:

8500 S.H. 71 West

If a conflict should result with the request I am submitting to the City of Austin due to subdivision plat notes, deed restrictions, and/or restrictive covenants it will be my responsibility to resolve it. I also acknowledge that I understand the implications of use and/or development restrictions that are a result of a subdivision plat notes, deed restrictions, and/or restrictive covenants.

I understand that if requested I must provide copies of any and all subdivision plat notes, deed restrictions, and/or restrictive covenant information which may apply to this property.

Ted McC 5-22-13
(Applicant's signature) (Date)

SCANNED

May 13, 2013

Greg Guernsey, A.I.C.P. – Director
Planning and Development Review Department
City of Austin
505 Barton Springs Rd.
Austin, TX 78704

Re: Agent Authorization letter
The Terrace in Oak Hill
8500 S.H. 71 West

Mr. Guernsey:

As the owner of the property located at 8500 S.H. 71 West, per a Tax Resale Deed (Doc. #2003254026), I am hereby granting Doucet & Associates, Inc. the right to act as Authorized Agents on development applications associated with this property. This includes, but is not limited to, zoning, subdivision/land status, site development permit, and related applications as may be required.

Please call me if you have any questions.

Sincerely,

Michael B. Knepp
Owner, 8500 S.H. 71 West
(512) 576-4620

SCANNED

DOUCET
& ASSOCIATES

7401B Highway 71 West, Suite 160
Austin, TX 78735
Office: 512.583.2600
Fax: 512.583.2601

DoucetandAssociates.com

June 26, 2013

Planning and Development Review Department
Attn: Lee Heckman, AICP
505 Barton Springs Rd., 5th Floor
Austin, TX 78704

Re: Cover Letter
PUD Zoning Amendment
8500 S.H. 71 West
C814-2007-0009

Mr. Heckman:

This is Ted McConaghy, M.A. with Doucet & Associates, Inc. We are the authorized agents for the owner of the property located at 8500 S.H. 71 West. This property was zoned 'PUD' in 2007 per Ordinance #20070726-104 (Case No. C814-2007-0009.) We are seeking a PUD Amendment to modify certain aspects of the approved PUD, in conformance with the LDC 25-2, Article 2, Division 5, Subpart 3, Sec. 3.1.2.

The following items are attached for your review:

- PUD Amendment application and support material
  - Application
  - Summary Letter
  - Variance Request Letter
  - Revised PUD Land Use Plan
  - Submittal Verification and Acknowledgement forms
  - TIA form
  - Field notes
  - Tax certificate
  - Tax map
  - Location map
  - Agent Authorization letter
- Zoning Ordinance No. 20070726-104 (including original PUD Land Use Plan)
- Original PUD Zoning Case info (C814-2007-0009)
  - City Council review sheet
  - Variance Request letter

Please contact me if you have any questions regarding this PUD Amendment application.

Sincerely,

Ted McConaghy, MA
Senior Planner
Doucet & Associates, Inc.

SCANNED

COMMITMENT YOU EXPECT.
EXPERIENCE YOU NEED.
PEOPLE YOU TRUST.

TAX CERTIFICATE NO 1323771

Bruce Elfant
Travis County Tax Assessor-Coll tor
P.O. Box 1748
Austin, Texas 78767
(512) 854-9473

ACCOUNT NUMBER: 04-0244-0213-0000

PROPERTY OWNER:

KNEPP MICHAEL B
3604 WYLDWOOD RD
AUSTIN, TX 78739-4408

PROPERTY DESCRIPTION:

ABS 101 SUR 93 BOWLES A ACR 8.900

ACRES 8.9000 MIN% .000000000000 TYPE

SITUS INFORMATION: 8500 W STATE HY 71

This is to certify that after a careful check of tax records of this office, the following taxes, delinquent taxes, penalties and interests are due on the described property of the following tax unit(s):

YEAR	ENTITY	TOTAL
2012	AUSTIN ISD	*ALL PAID*
	CITY OF AUSTIN (TRAV)	*ALL PAID*
	TRAVIS COUNTY	*ALL PAID*
	TRAVIS CENTRAL HEALTH	*ALL PAID*
	ACC (TRAVIS)	*ALL PAID*
TOTAL SEQUENCE 0		*ALL PAID*

TOTAL TAX:	*ALL PAID*
UNPAID FEES:	* NONE *
INTEREST ON FEES:	* NONE *
COMMISSION:	* NONE *
TOTAL DUE ==>	*ALL PAID*

TAXES PAID FOR YEAR 2012 $4,838.09

ALL TAXES PAID IN FULL PRIOR TO AND INCLUDING THE YEAR 2012 EXCEPT FOR UNPAID YEARS LISTED ABOVE.
The above described property may be subject to special valuation based on its use, and additional rollback taxes may become due. (Section 23.55, State Property Tax Code).
Pursuant to Section 31.08 of the State Property Tax Code, there is a fee of $10.00 for all Tax Certificates.

GIVEN UNDER MY HAND AND SEAL OF OFFICE ON THIS DATE OF 05/13/2013

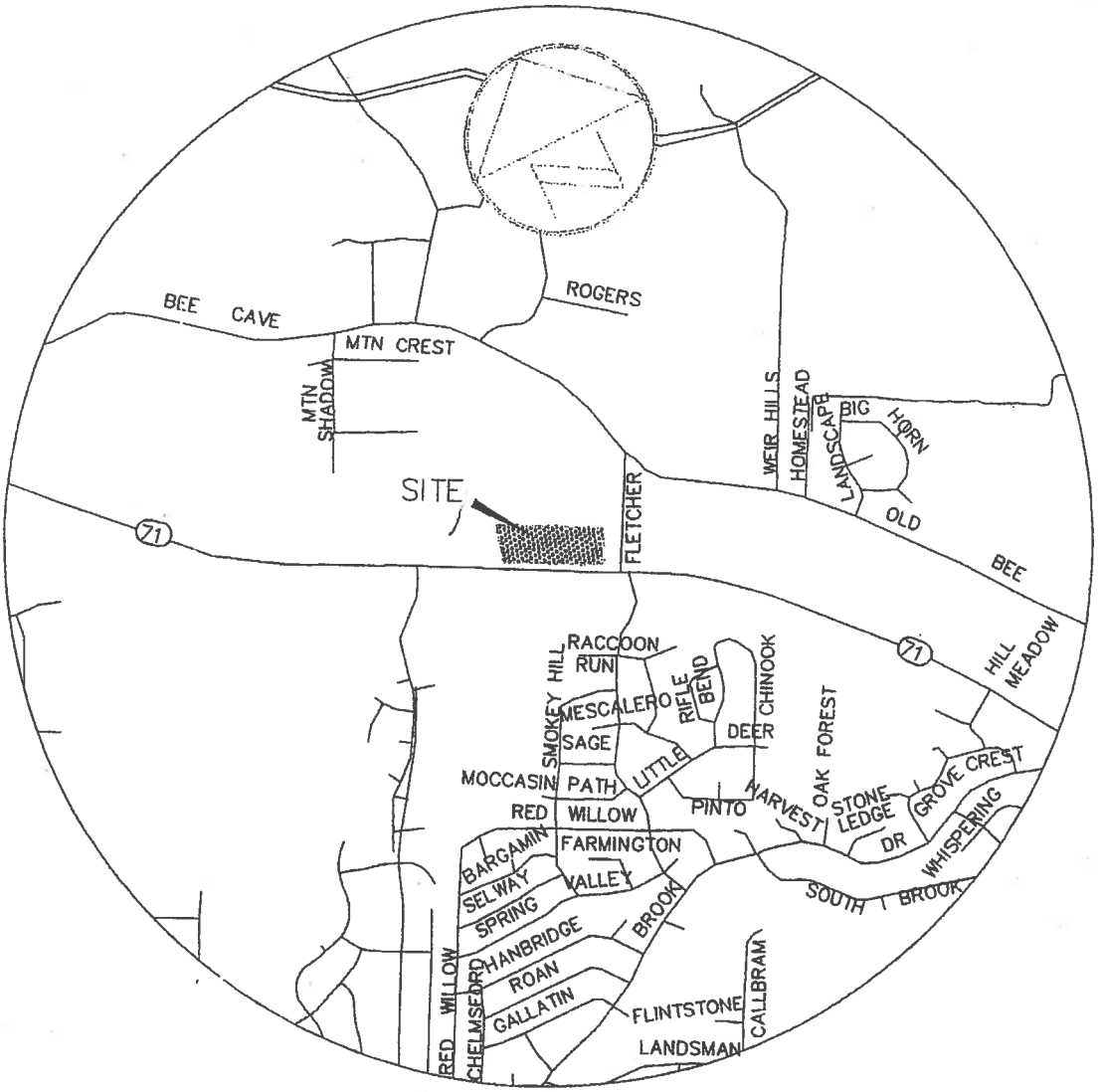
Fee Paid: $10.00

Bruce Elfant
Tax Assessor-Collector

By: Sirie Martin DeOca

MONTESS printed on 05/13/2013 @ 12:16:15:66

SCANNED



LOCATION MAP
NOT TO SCALE

SCANNED

8500 SH 71

Imagery: 2012

1 inch = 2,000 feet

N

0 1,000 2,000 6,000 Feet

SCANNED

Chaparral

Professional Land Surveying, Inc.
Surveying and Mapping

Office: 512-443-1724
Fax: 512-389-0943

3500 McCall Lane
Austin, Texas 78744

8.921 ACRES
AUGUSTINE BOWLES SURVEY NO. 93

A DESCRIPTION OF 8.921 ACRES OF LAND (APPROXIMATELY 388,600 SQ. FT.) OUT OF THE AUGUSTINE BOWLES SURVEY NO. 93, SITUATED IN TRAVIS COUNTY, TEXAS, AND BEING THE SAME PROPERTY DESCRIBED AS 7.9 ACRES OF LAND OUT OF AN 8.9 ACRE TRACT OF LAND AND 1.0 ACRE OF LAND OUT OF AN 8.9 ACRE TRACT OF LAND DESCRIBED IN VOLUME 2047, PAGE 178 OF THE DEED RECORDS OF TRAVIS COUNTY, TEXAS AND CONVEYED TO MICHAEL B. KNEPP BY TAX RESALE DEED, DATED OCTOBER 28, 2003 AND RECORDED IN DOCUMENT NO. 2003254026 OF THE OFFICIAL PUBLIC RECORDS OF TRAVIS COUNTY, TEXAS; SAID 8.921 ACRE TRACT BEING MORE PARTICULARLY DESCRIBED BY METES AND BOUNDS AS FOLLOWS:

BEGINNING at a calculated point in the north right-of-way line of State Highway 71 (150' right-of-way), being at the southwest corner of the said 8.921 acre tract, and being also at the southeast corner of Lot 1, Southwest Trails, a subdivision of record under Document No. 200000300 of the Plat Records of Travis County, Texas, from which a concrete highway monument found in the north right-of-way line of State Highway 71, at engineer's centerline station 1719+86.53, bears North 62°00'40" West, a distance of 841.63 feet;

THENCE North 15°28'33" East departing said right-of-way line, along the common line of the 8.921 acre tract and said Lot 1, at a distance of 0.83 feet passing a 1/2" rebar found, and continuing for a total distance of 380.93 feet to a 1/2" rebar found in the south line of Lot 3, Southwest Trails, at the northwest corner of the 8.921 acre tract, being the northeast corner of said Lot 1, from which another 1/2" rebar found bears South 50°13'26" West, a distance of 0.34 feet;

THENCE along the north line of the 8.921 acre tract, being in part, the south line of said Lot 3, and in part, the south line of a 19.687 acre tract described in a Warranty Deed to Central Texas/ SWA Mutual Housing Corporation recorded under Document No. 2001001683 of the Official Public Records of Travis County, Texas, the following two (2) courses and distances:

1. South 61°59'36" East, a distance of 1042.18 feet to a 1/2" iron pipe found;

2. South 25°43'11" East, a distance of 60.68 feet to a 1/2" iron pipe found at the north corner of a 0.996 acre tract described in a Certificate Regarding Mergers to 7-Eleven recorded in Document 2013011903 of the Official Public Records of Travis County, Texas, from which a 1/2" rebar found bears North 22°20'58"

SCANNED

West, a distance of 0.81 feet;

THENCE South 28°41'58" West, along the east line of the 8.921 acre tract, being the northwest line of the said 0.996 acre tract, at a distance of 335.12 feet passing a 1/2" iron pipe found, and continuing for a total distance of 335.39 feet to a calculated point in the north right-of-way line of State Highway 71, from which a concrete highway monument found in the north right-of-way line of State Highway 71, at engineer's centerline station 1745+61.69, bears South 62°03'29" East, a distance of 729.21 feet;

THENCE with the north right-of-way line of State Highway 71, being the south line of the 8.921 acre tract, the following two (2) courses and distances:

1. North 62°03'29" West, a distance of 345.93 feet to a concrete highway monument found at engineer's centerline station 1734+68.49;

2. North 62°00'40" West, a distance of 658.46 feet to the **POINT OF BEGINNING**, containing 8.921 acres of land, more or less.

Surveyed on the ground April 11, 2013. Bearing Basis: Grid Azimuth for Texas Central Zone, 1983/93 HARN values from LCRA control network.

Robert C. Watts, Jr.
Registered Professional Land Surveyor
State of Texas No. 4995

STATE OF TEXAS REGISTERED ROBERT C. WATTS, JR. 4995 PROFESSIONAL LAND SURVEYOR

4-18-13

SCANNED

SECTION 10 – PROJECT DESCRIPTION FORM

A project description form, attached as Exhibit A, must be submitted with a subdivision, site plan, and building permit application. A project description form must also be submitted with a water or wastewater service extension request.

EXHIBIT A
PROJECT DESCRIPTION FORM

The purpose of this form is to provide information that may clarify the nature of the project. Clarification may affect the City's determination on the application of Chapter 245 to the project. However, the form is not intended to affect the status of a project in progress, unless there are changed circumstances. This form does not preclude presentation of additional information to assist in the Chapter 245 determination. The information contained in this form will not result in any waiver of a Chapter 245 claim. The right to make a Chapter 245 claim, notwithstanding the information below, is reserved to the applicant.

Is the property currently developed? No If yes, how _____

_____

_____

Permit number: _____ **Submittal Date:** _____

Permit type: Preliminary Plan_____; Final Plat_____; Site Plan _____;

Building Permit _____; Water or wastewater service extension request _____

Legal Description/Subdivision Reference: 8.921 acres, Augustine Bowles Survey No 93

Lot(s) ID_____

Please check the appropriate project description for this lot within the city limits:

___ No defined project

___ Residential Mixed Use (contains a mixture of residential uses)

___ Commercial Mixed Use (contains a mixture of one or more commercial, industrial and/ or civic uses)

___ Commercial and Residential Mixed Use (contains a mixture of one or more residential, commercial, industrial and/ or civic uses)

___ Residential Class I (one or more of the residential uses permitted in the SF-5 or more restrictive base zoning districts)

_X_ Residential Class II (one or more of the residential uses permitted in the SF-4A or less restrictive base zoning districts)

___ Commercial Class I (commercial uses containing at least 50% Administrative and Business Office, Medical Offices, Professional Office ("Office Uses")

___ Commercial Class II (commercial uses containing no more than 50% Office Uses)

___ Industrial

___ Civic

___ Other use not listed. Specify: _____

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Please check the appropriate project description for this lot within the city's ETJ:

___ Mixed Use ___ Commercial ___ Civic

___ Residential ___ Industrial

FURTHER COMMENTS DESCRIBING PROJECT (OPTIONAL):

_____

_____

_____

Owner or Authorized Representative:

I certify that this Project Description Form is true and accurate

Print Name Ted McConaghy

Signature Ted McGy w/ Doucet & Assoc. **Date:** 6-26-13

Address 7401-B Hwy 71 W., Ste 160 Austin TX 78735

Phone/Fax 512-583-2617 582-583-2601

SCANNED

INTAKE SUBMITTAL CHECKLIST
ORDINANCE AMENDMENTS

City Of Austin Planning and Development Review Department

505 Barton Springs Blvd. Austin, TX 78704 Ph. 974-2689, 974-2681, 974-7208 or 974-2350 Fax 974-2620

Departmental Use Only:

File Number:_____ Date Issued:_____

Intake Specialist:_____ Date:_____

Applications Subject to this Checklist:

- Restrictive Covenant Amendments
- Site Plan Deletions (Partial or Total)
- Ordinance Amendments (PDA Agreements, etc.)

Information Required for Submittal:

✓ 1. Completed application form with appropriate signatures

✓ 2. ZAP, PC or CC approval is required for this process; submit full size tax maps (1"=100') showing all properties within **500'** of the redlined site area (the entire tract must be redlined).

✓ 3. Completed and signed TIA Determination Form

WA 4. TIA revision fee, if applicable

✓ 5. Letter addressed to the Planning Commission or Zoning and Platting explaining what the amendment is for, i.e. if it is a site plan deletion, an explanation as to why the deletion is requested

✓ 6. Signed Submittal Verification and Inspection Authorization

✓ 7. Legible 4" x 4" Location map on a separate 8½" x 11" sheet

✓ 8. Current Tax Certificate

✓ 9. Written authorization from the owner for the agent, if applicable

✓ 10. Subject to: ZAP_____ **or** PC ✓ Project Description Form

✓ 11. Project Description Form

SCANNED

Determination of
Planning Commission or Zoning & Platting Commission
Assignment

I, Ted McConaghy owner or authorized agent for the following project.

Name of project: Terrace in Oak Hill

Address of project: 8500 S.H. 71 W

Case Number: _____

Check One:

✓ have verified that this project ***does*** fall within the boundaries of an approved neighborhood plan or a proposed plan as defines in 25-1-46(D).

Name of neighborhood plan Oak Hill Combined

Commission assigned: **Planning Commission**

_____ have verified that this project ***does not*** fall within the boundaries of an approved neighborhood plan.

Commission assigned: **Zoning and Platting Commission**

I understand if I have not accurately determined if my project falls inside or outside the boundaries of an approved neighborhood plan, I may experience delays in processing my project through the appropriate commission.

Owner or Agent: Ted McConaghy Intake Date: 6-28-13

SCANNED

City of Austin

P.O. Box 1088, Austin, Texas 78767

RECEIPT

Receipt No.: 5816509 **Payment Date:** 06/28/2013 **Invoice No.:** 5832519

Payer Information

Company/Facility Name:

Payment Made By: Theodore W. McConaghy
1300 SPYGLASS DR APT 123
AUSTIN TX 78746-7526

Phone No.: (512) -

Payment Method: Check

Payment Received: $62.24

Amount Applied: $62.24

Cash Returned: $0.00

Comments: CHECK 1804

Additional Information

Department Name: Neighborhood Planning and Zoning

Receipt Issued By: Crystal Lopez

Receipt Details

FAO Codes	Fee Description	Internal Ref. No.	Address	Permit/Case No.	Amount
8131-6807-1113-4066	Development Services Surcharge	10973254	8500 W SH 71	2013-067406-ZC	$62.24
				Total	**$62.24**

SCANNED

Printed: 07/01/13 03:51 PM

City of Austin

P.O. Box 1088, Austin, Texas 78767

RECEIPT

Receipt No.: 5816509 **Payment Date:** 06/28/2013 **Invoice No.:** 5832519

Payer Information

Company/Facility Name:

Payment Made By: Theodore W. McConaghy
1300 SPYGLASS DR APT 123
AUSTIN TX 78746-7526

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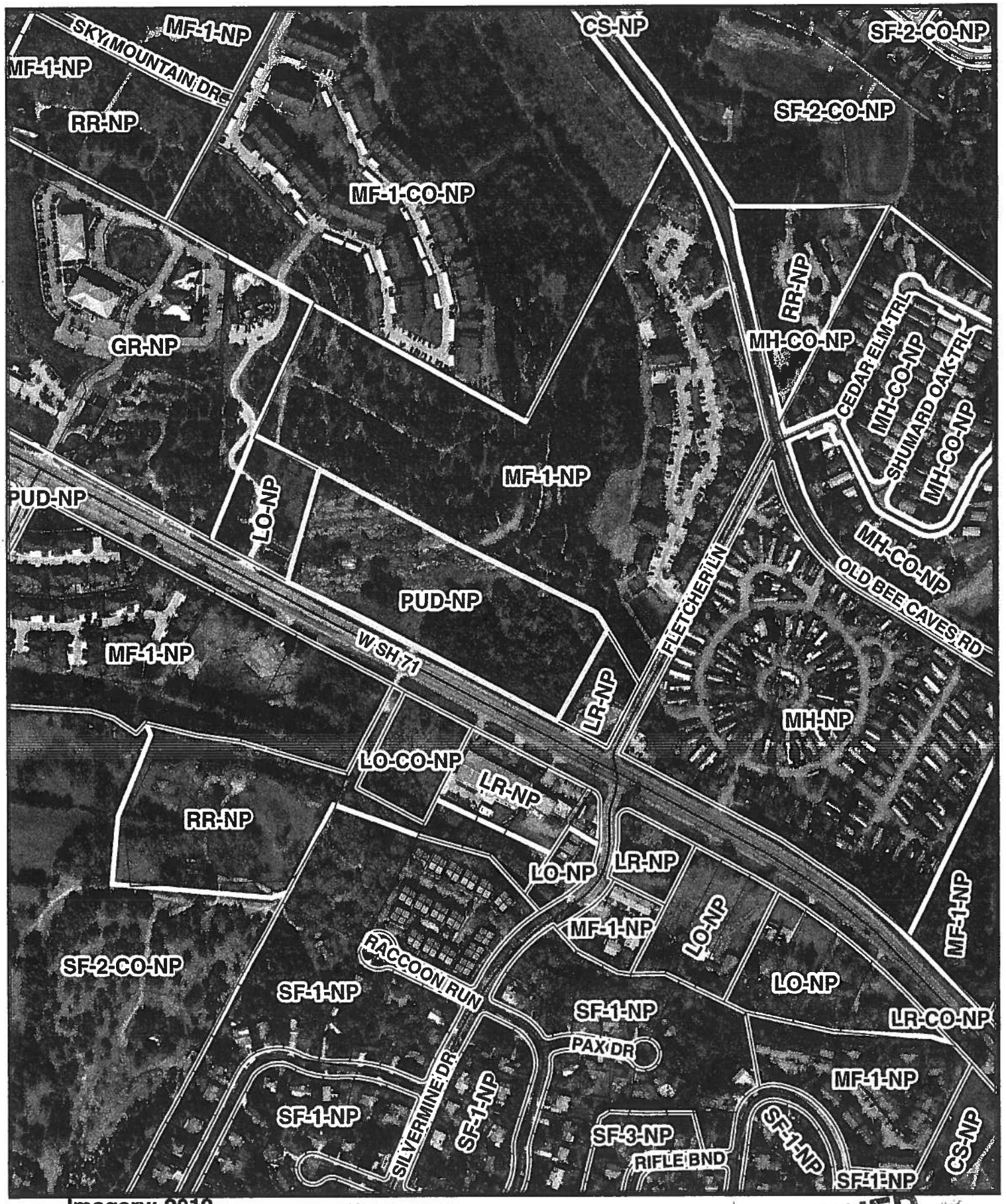
				Total	**$62.24**

SCANNED

Printed: 07/01/13 03:51 PM

8500 SH 71



Imagery: 2012

1 inch = 400 feet

N

0 250 500 1,000 1,500 Feet

SCANNED

FOLDER DETAILS

Permit/Case	Reference File Name	Description	Sub Type	Work Type	Project Name	Status	Application Date	Issue Date	Expir Da
2013-067406 ZC	C814-2007-0009.01	The applicant is proposing to amend the exisitng PUD from PUD (GO) to PUD (MF-2)	Planned Unit Development (PUD)	Land Plan Amendment	Terrace in Oak Hill (formerly called 'West 71 Office Park')	In Review	Jun 28, 2013		Jun 26, 2014

Related Folder

FOLDER INFO

Information Description	Value
Smart Housing?	No
Land Development Jurisdiction	Full-Purpose
Zoning Application Initiated by	MUD
Case Manager	Lee Heckman
Project Name	Terrace in Oak Hill (Formerly called 'West 71 Office Park')
Acres	8.9
Neighborhood Plan Area ?	Yes
Traffic Impact Analysis Required?	Not Required
Traffic Impact Analysis Submitted?	No
ZC Existing Land Use	Vacant
ZC Proposed Land Use	Multifamily
Existing Zoning	PUD-GO
Proposed Zoning	PUD-MF2
Application Initiated by?	Other
Application Date	Jun 28, 2013
Project Street Address	8500 S.H. 71 West
Comments Due Date	Nov 1, 2013

PEOPLE DETAILS

Desc.	Organization Name	Address	City	State	Postal	Phone1
Applicant	Doucet & Associates (Ted McConaghy)	7401 B HIGHWAY 71 WEST SUITE 160	Austin	TX	78735	(512)58 2600
Billed To	Knepp Incorporated	3604 WYLDWOOD RD	AUSTIN		78739-4408	(512)29 0600
Billed To	(Theodore W. McConaghy)	1300 SPYGLASS DR APT 123	AUSTIN	TX	78746-7526	(512

FOLDER FEE

Fee Description	Fee Amount	Balance
Regular Rezoning Fee	$1,108.00	$0.00
Sign Fee	$69.00	$0.00
Sign Fee	$69.00	$0.00
Sign Fee	$69.00	$0.00
Notification/Renotification	$241.00	$0.00
Development Services Surcharge	$62.24	$0.00

PROCESSES AND NOTES

Process Description	Status	TOD	Schedule Date	Start Date	End Date	Assigned Staff	# of Atte
NPZ Comprehensive Planning Review	Approved		Jun 28, 2013	Jul 8, 2013	Jul 8, 2013	Kathleen Fox (512-974-7877)	
NPZ Drainage Engineering Review	No Review Required		Oct 22, 2013	Nov 1, 2013	Nov 1, 2013	Michael Duval (512-974-2349)	
Site Plan Review	Closed		Oct 22, 2013	Nov 8, 2013	Nov 8, 2013	Christine Barton-Holmes (512-974-2788)	

Staff Report	Open				Lee Heckman (512-974-7604)
Zoning Application Review	Open	Oct 22, 2013			Case Manager Review
Zoning Application Review	Closed	Jul 1, 2013		Oct 22, 2013	Lee Heckman (512-974-7604)
Heritage Tree Review	Closed	Jun 28, 2019	Aug 16, 2013	Aug 16, 2013	Keith Mars (512-974-2755)
Awaiting Update	Closed	Oct 22, 2013	Oct 22, 2013	Oct 22, 2013	Intake Group
Case Manager Log	Open				Lee Heckman (512-974-7604)
Posting Sign at Site	Open	Jul 2, 2013			Zoning Inspector
Initial Distribution	Closed	Jul 1, 2013	Jul 1, 2013	Jul 1, 2013	Intake Group
NPZ Environmental Review	Informal Update Req'd	Oct 22, 2013	Nov 8, 2013	Nov 8, 2013	Mike Mcdougal (512-974-6380)
NPZ Environmental Review	Rejected	Jun 28, 2013	Jul 24, 2013	Jul 24, 2013	Mike Mcdougal (512-974-6380)
NPZ Legal Department Review	Closed	Jun 28, 2013		Oct 22, 2013	
NPZ Site Plan Review	Approved	Jun 28, 2013	Jul 19, 2013	Jul 19, 2013	Christine Barton-Holmes (512-974-2788)
NPZ Zoning Review	Open	Oct 22, 2013			Lee Heckman (512-974-7604)
Early Notification	Closed	Jun 28, 2013	Jul 19, 2013	Jul 19, 2013	Debra Sustaita (512-974-2193)
NPZ PARD/Planning & Design Review	Rejected	Oct 22, 2013	Nov 1, 2013	Nov 1, 2013	Marilyn Shashoua (512-974-9372)
Submittal Intake	Closed	Jun 28, 2013	Jun 28, 2013	Jul 1, 2013	Intake Group
Austin Water Utility Review	Closed	Jun 28, 2013	Jul 2, 2013	Jul 2, 2013	Bradley Barron (512-972-0078)
NPZ Transportation Review	Approved	Jun 28, 2013	Jul 22, 2013	Jul 22, 2013	Shandrian Jarvis (512-974-2628)
Electric Review	Closed	Jun 28, 2013	Jul 23, 2013	Jul 23, 2013	David Lambert (512-322-6109)
NPZ Mapping Review	Approved	Jun 28, 2013	Jul 5, 2013	Jul 5, 2013	Stacy Meeks (512-974-3279)
Update Distribution	Closed	Oct 23, 2013	Oct 22, 2013	Oct 22, 2013	Shari Pape (512-974-2689)

FOLDER ATTACHMENT

Description	Detail	
C814-2007-0009.01	Filed 6/28/13 Formal 6/28/13	View Attachment
C814-2007-0009.01-Update #1	Filed 10/22/2013	View Attachment

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FOUNDATION COMMUNITIES
creating housing where families succeed

Foundation Communities Proposal: Build an additional 60 to 70 apartments to serve working families as a second phase of Southwest Trails.

Who is Foundation Communities?

- Local nonprofit founded in 1990
- Owner and manager of 14 communities around Austin, all built in cooperation with local neighborhood associations
- Provider of free after-school and summer youth programs, as well as financial stability and healthy living programs
- United Way Capital Area partner agency
- Neighborhood Excellence Award winner from Bank of America

M Station
2906 E. MLK Blvd

Who will live in this new community?

- Families with an average income of approximately $30,000
- Families looking for affordable homes with amenities and close proximity to work and play

Trails at the Park
815 Slaughter Ln

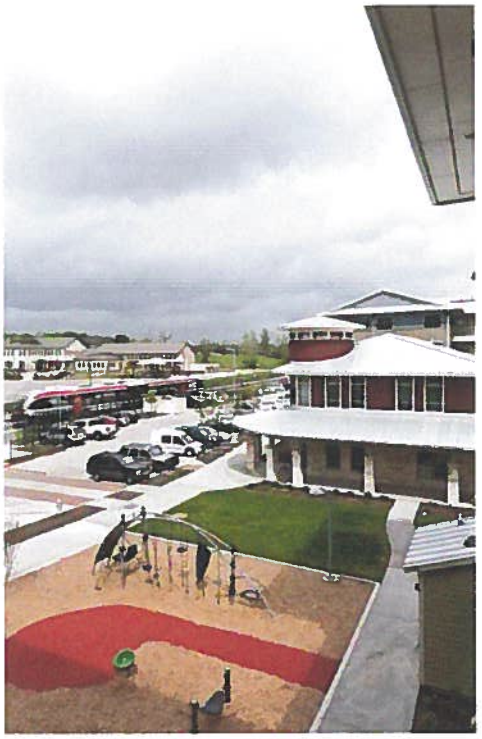
Onsite Community Features

- After school tutoring and summer programs for children
- Wide range of adult education and services:
  - Computer labs
  - Tax preparation
  - Money management classes & savings programs
  - ESL and GED courses
  - Fitness and nutrition classes
  - Gardening and green workshops

All programming is free and open to the public based on space and funding availability.

Management Practice

- Strict leasing criteria and enforcement of lease
- Zero tolerance for criminal activity
- Long-term ownership and management
- Extraordinary track record of success
- On site support services
- We are NOT PUBLIC HOUSING, SECTION 8, OR A HOMELESS SHELTER
- All residents must pay rent



M Station

"Yes" in Our Back Yard

Studies indicate conclusively that affordable housing has little or no effect on neighboring property values. None of our communities in Austin have hurt surrounding property values. These neighborhoods support Foundation Communities:

Austin Interfaith
Blackland Neighborhood Association
Far South Austin Neighborhood Association
Galindo Elementary Neighborhood Association
Guadalupe CDC
Downtown Austin Alliance
McKinley Heights Neighborhood Association
Mueller Neighborhoods Coalition
South Lamar Neighborhood Association
Southwood Neighborhood Association
St. Johns Neighborhood Association
Chestnut Neighborhood Association
Austin Heights Neighborhood Association
Downtown Austin Neighborhood Association

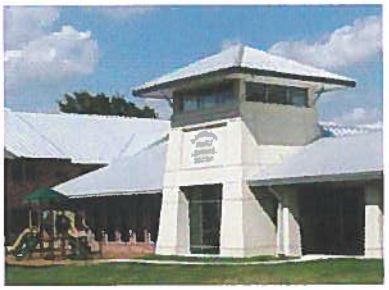
Tours and More Information

We look forward to sharing more information with you and asking for the Oak Hill Association of Neighborhoods' (OHAN) support. Please join us for a tour of Southwest Trails:

Tuesday, January 28 – 3:30-5:00pm or **Tuesday, February 4 – 6:00–7:30pm**

RSVP to Alyah Khan, Communications Coordinator at 512.610.4009 or alyah.khan@foundcom.org

M Station Learning Center



Sierra Vista Learning Center

Southwest Trails Leasing Office

Southwest Trails
Learning Center
Southwest Trails Phase II
Old Bee Caves Rd
71
Renobeth Cir
Silvermine Dr
© 2013 Google
Imagery Date: 10/31/2013

TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS

www.tdhca.state.tx.us

Rick Perry
GOVERNOR

BOARD MEMBERS
J. Paul Oxer, *Chair*
Juan S. Muñoz, PhD, *Vice Chair*
Leslie Bingham-Escareño
Tom H. Gann
J. Mark McWatters
Robert D. Thomas

April 30, 2014

Writer's direct phone # 512-475-1676
Email: jean.latsha@tdhca.state.tx.us

James Schissler
President
Oak Hill Association of Neighborhoods
5701 S Mopac #834
Austin, TX 78709

RE: LETTER FROM YOUR NEIGHBORHOOD ORGANIZATION FOR QUANTIFIABLE COMMUNITY PARTICIPATION POINTS FOR SOUTHWEST TRAILS PHASE II (TDHCA #14069)

Dear Mr. Schissler:

The Texas Department of Housing and Community Affairs ("Department") has received the documentation you submitted for purposes of scoring Quantifiable Community Participation ("QCP") points, in accordance with §11.9(d)(4) of the Qualified Allocation Plan ("QAP"), for the above referenced application.

The Department has reviewed the information provided and has determined that OAK HILL ASSOCIATION OF NEIGHBORHOODS is eligible to submit statements that could qualify for points on an application pursuant to §11.9(d)(4) of the QAP. We received such statement from your organization with respect to the above referenced application, and it has been awarded 8 points.

The Department appreciates your participation in the public comment process. If you have any questions relating to the score awarded, please do not hesitate to contact me at 512.475.1676 or by email at jean.latsha@tdhca.state.tx.us.

Sincerely,

Jean Latsha
Director of Multifamily Finance

JML

ATTACHMENT 13:
SUPPORTIVE SERVICE RESUMES

JULIAN HUERTA

Julian.huerta@foundcom.org

OBJECTIVE

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

EMPLOYMENT EXPERIENCE

Director of Programs; Foundation Communities, 1998 to present

Develop and direct educational and social service programs that assist families residing in affordable housing communities to increase their self-sufficiency.
Hire, train and supervise professional staff at multiple sites.
Research and author grant proposals to public and private sources to fund social service programs.
Collect participation and outcomes data on educational and family support programs, conduct program assessments, and submit reports to funding agencies and board of directors.
Collaborate with other community-based organizations and public agencies to maximize opportunities available to residents.

Executive Director; Literacy Austin, 1996 – 1997

Provided leadership for all programs, hired and supervised staff, and prepared and implemented annual budget in order to achieve agency mission as defined in conjunction with volunteer board of directors.
Directed public relations, community outreach and fund raising initiatives, including proposal writing, corporate and individual solicitations and special events.
Collaborated with other community-based organizations, United Way and Community Action Network partners, and citizen groups to coordinate and maximize services to disadvantaged residents of Travis County.

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

Collected and analyzed data from multiple education and human service programs and submitted reports to funding agencies, senior managers and board of directors.
Oversaw eligibility determination, assessment and enrollment of participants according to contract requirements.
Hired, trained and supervised Information Systems, Intake and clerical staff.
Participated in the evaluation of agency programs, including designing and conducting research on client outcomes.
Assisted with the development of funding proposals to public and private sources.
Administered local area network, installed and maintained computer software and provided user training and support.

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

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

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

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

EDUCATION

Master of Science, Community and Regional Planning: University of Texas at Austin 1993.

Bachelor of Arts, Political Science; University of the Incarnate Word, 1987.

OTHER SKILLS

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

Speak, read and write Spanish.

COMMUNITY INVOLVEMENT

Community Sabbatical Grantee, University of Texas Humanities Institute

Chairperson, Austin Asset Building Coalition

Member of the Board of Directors, Marywood Children and Family Services

Licensed Foster Parent, Texas Department of Protective and Regulatory Services

Mario Cortez

[redacted]

Professional Experience

Front Steps, Inc., Austin Texas — *7/04 – present*

Keep Austin Housed AmeriCorps Program Coordinator

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

Foundation for the Homeless, Inc., Austin, Texas — *7/03 – 7/04*

Director of Social Services

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

Woodside Trails Therapeutic Camp, Smithville, Texas — *1/03 – 7/03*

MSSW Student Intern

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

Foundation for the Homeless, Inc., Austin, Texas

Intake Manager — *6/02 – 7/03*

Passages Case Manager — *10/97 – 5/02*

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

American Institute for Learning, Austin, Texas — *9/96 – 5/97*

BSW Student Intern

- Served as counselor intern for GED classroom and the Career Resource Center.
- Provided educational and general counseling for culturally diverse, at-risk youth.
- Facilitated adolescent male support group (ages 16-18) with an emphasis on gang related topics.
- Created and edited student involved newsletter for the Career Resource Center.

Helping Our Brothers Out, Inc., Austin, Texas — *7/93 – 12/95*

Client Services Specialist

- Administered direct client services and provided crisis intervention to general homeless population.
- Developed and maintained database that documented governmental benefits for approximately two thousand clients.
- Assisted with recruitment, orientation and supervision of agency volunteers.
- Maintained monthly reports for client services, volunteer participation, and community service workers.

Education

Master of Science in Social Work — *8/03*

The University of Texas at Austin, Austin, Texas

Concentration: Clinical

Bachelor of Social Work — *5/97*

The University of Texas at Austin, Austin, Texas

Generalist Practice

Honors & Affiliations

- Butler Award nominee (Keep Austin Housed) for True Spirit of Collaboration (recipients not yet announced) — *2007*
- Certified Field Instructor for The University of Texas School of Social Work — *2004*
- Phi Alpha National Social Work Honor Society — *2003*
- The Honor Society of Phi Kappa Phi — *2003*
- Social Services Case Management Network, Executive Committee Member — *2003 – 2006*
- Caring Forever Award, Community award presented by Shepard of the Hills Presbyterian Church — *2002*
- Homeless Task Force/Ending Community Homelessness Coalition (ECHO) — *1998 – present*

Salary Requirement

$50,000

Erika Leos

[redacted]

Work Experience

October 2008-present **Foundation Communities** *Financial Coaching Coordinator* Austin, TX

- Developed training and resource materials for Volunteer Financial Coaches and clients
- Maintain accuracy and timeliness of training and resource materials
- Conduct training for over 100 Volunteer Financial Coaches each year
- Coordinate the program's day-to-day operations
  - manage appointments through the program's scheduling system for over 300 clients a year
  - serve as a resource for volunteers with questions about financial issues
- Administer a payday loan alternative sub-program
- Administer a college savings incentive sub-program
- Compile data and write reports for program funders

June 2004-October 2008 **Foundation Communities** *Adult Education Coordinator* Austin, TX

- Taught English as a Second Language (ESL) to adults at two Foundation Communities Learning Centers
- Developed activities, materials and assessments for ESL class students
- Recruited, trained and managed volunteer ESL instructors
- Taught Money Management course for adults using Foundation Communities' curriculum, "Making More Sense of Your Dollar," in English and Spanish
- Provided individual credit counseling to participants in the Money Management course

June 2003-May 2004 **Century Motorcars** *Insurance Specialist* Austin, TX

- Verified that all vehicles financed by Century Motorcars were properly insured
- Issued orders for repossession of cars that were not properly insured
- Collected and recorded car payments
- Contacted clients who were behind on car payments or who allowed insurance coverage to lapse, and contacted their references

June 2002-May 2004 **Foundation Communities** *Youth Program Assistant/ESL Instructor* Austin, TX

- Provided a positive, supportive environment for the children of low income families after school and during the summer at the Sierra Ridge Learning Center
- Assisted children in the After School Program at with homework
- Led physical, educational and recreational activities for children in the After School and Summer Programs
- Taught English as a Second Language to adults at two Foundation Communities' Learning Centers

Sep 1998-May 2002 **Pentacon Industrial Group** *Sales Assistant* Austin, TX and El Paso, TX

- Helped finance all four years of college through part-time work at Pentacon
- Operated specialized distribution software to confirm purchase order accuracy
- Maintained filing system up to date and in order

Volunteer Activities

Jan-April 2005 **Foundation Communities' Community Tax Centers** *Tax Preparer* Austin, TX

- Prepared and e-filed personal income tax forms for low income families and individuals at two Community Tax Centers free of charge
- Distributed information about banking services to unbanked clients
- Translated information for Spanish-speaking tax payers

Skills

Language

- Fluent in Spanish (oral and written)

Computer Knowledge

- Fully proficient in Microsoft Word, PowerPoint, Excel, Outlook, and Windows XP
- Experienced in managing data in Microsoft Access

Personal Skills

- Well organized
- Excellent oral and written communication skills

Education

May 2002 **The University of Texas at Austin**
Bachelor of Business Administration, Marketing

Honors and Activities

Presidential Achievement Scholarship

- Earned and maintained the four-year scholarship from UT through academic achievement

1999-2000 **Hispanic Business Students Association**
Executive Vice President

- Received *Most Outstanding Organization* award from UT Leadership Board
- Coordinated events for Professional Development Committee
- Coordinated events for Recruitment and Retention Committee
- Participated in Corporate Mentor program

1999-2000 **National Hispanic Business Association**
University of Texas at Austin Representative

- Helped coordinate the 10th annual NHBA Leadership Conference
- Coordinated joint activities for NHBA and HBSA

KAREN LYONS SERNA

PROFESSIONAL EXPERIENCE

Foundation Communities – Austin, Texas
2003- Present

Director of Asset Building Programs 2008 – Present

Lead Foundation Communities' programs aimed at helping low- to moderate-income individuals and families increase their understanding of financial issues and acquire assets that contribute to long-term financial stability. Provide oversight to the Community Tax Centers Program, the Financial Coaching Program, FAFSA Program, Financial Education Classes, and various savings initiatives which collectively serve nearly 18,000 clients per year. Lead a staff of eight.

IDA Program Coordinator 2003 - 2008

Managed all aspects of the Individual Development Account (IDA) Program. Instructed 12-hour homebuyer education course in English and Spanish. Provided technical assistance to emerging IDA Programs. Advocated for asset building policy on the local, state, and national level.

Casa Marianella – Austin, Texas
1999-Present

Board of Directors, President 2004 – 2010

Coordinate and plan annual benefit dinner. Lead board in making organizational policy decisions. Recruit and train new board members. Lead monthly board meetings.

Assistant Director 2002-2003

Lead purchase of property to use for a women and children's shelter. Developed programming for the women and children's shelter. Grant writing and fundraising.

Language Program Coordinator 2000-2002

Managed the English as a Second Language and Spanish Literacy Program.

Operations Coordinator, *Full-time AmeriCorps Volunteer* 1999-2000

Provided case management to residents living in the shelter.

La Fuente Learning Center – Austin, Texas
2003 – 2008

English as a Second Language Instructor

Instructed evening classes to Spanish-speaking students. Monitored and tracked student performance and progress. Developed and implemented lesson plans.

The Austin Academy – Austin, Texas
2001 - 2002

Adult Education Instructor

Instructor of Adult Basic Education and English as a Second Language students preparing for the GED examination.

Crockett High School, Austin, Texas
2001

Biology Teacher

Developed and executed lesson plans. Attended to individual student needs and concerns.

KAREN LYONS SERNA

PRESENTATIONS

National Community Tax Coalition Conference, San Antonio, Texas, 2009
Topic: Asset Building Hubs: Bridging the Financial Mainstream Gap

CPPP William P. Hobby Policy Conference, Austin, Texas, 2008
Topic: The Role of State Policy and Advocacy in Building Assets and Wealth

Barbara Jordon Forum, Austin, Texas, 2007
Topic: The Great Divide: Wealth and Poverty

RAISE Texas Asset Building Summit, Dallas, Texas, 2006
Topic: Statewide Expansion of Individual Development Accounts and Matched Savings Programs

National Conference on Rural Housing, Washington D.C., 2004
Topic: Marketing and Recruitment Strategies for Individual Development Account Programs

National IDA Learning Conference, New Orleans, Louisiana, 2004
Topic: Preparing for Project Closeout: The Express Individual Development Account Program

Texas IDA Network Conference, Austin, Texas, 2004
Topic: Statewide Individual Development Account Initiatives

EDUCATION, CERTIFICATIONS AND SKILLS

Master of Science in Organizational Leadership and Ethics, 2011
St. Edward's University – Austin, Texas

Non-Profit Leadership Program for Emerging Leaders, 2007
Bank of America

Certified Volunteer Income Tax Preparer for VITA Program, 2005 – 2009
Internal Revenue Service

Certification of Professional Recognition in Homebuyer Education and Training, 2004
NeighborWorks

English as a Second Language Teacher Certification, 2003
State of Texas

Secondary Biology Teaching Certification
State of Pennsylvania (1999), State of Texas (2001)

Bachelor's Degree in Biology, 1999
Lycoming College – Williamsport, Pennsylvania

Oral and written proficiency in Spanish

ATTACHMENT 14:

SUPPORTIVE SERVICE BUDGET

Supportive Service Budget
Southwest Trails Phase II

Sources	**Year 1**	**Year 2**	**Year 3**	
Property Cash Flow	$60,000	$61,800	$63,654	
Foundations and Corporations	$7,000	$7,210	$7,426	
TOTAL SOURCES	**$67,000**	**$69,010**	**$71,080**	
Uses				**Notes**
Resident Service Coordinator	$35,000	$36,050	$37,132	one full-time position
Adult Education Coordinator	$18,000	$18,540	$19,096	one part-time position
Taxes and Benefits	$10,600	$10,918	$11,246	20% of salary
Supplies/Printing	$1,000	$1,030	$1,061	for client meetings and classes
Training/Travel/Mileage	$1,000	$1,030	$1,061	professional education
Direct Aid to Clients	$1,400	$1,442	$1,485	Bus passes, work search expenses, etc.
TOTAL	**$67,000**	**$69,010**	**$71,080**	

ATTACHMENT 15:

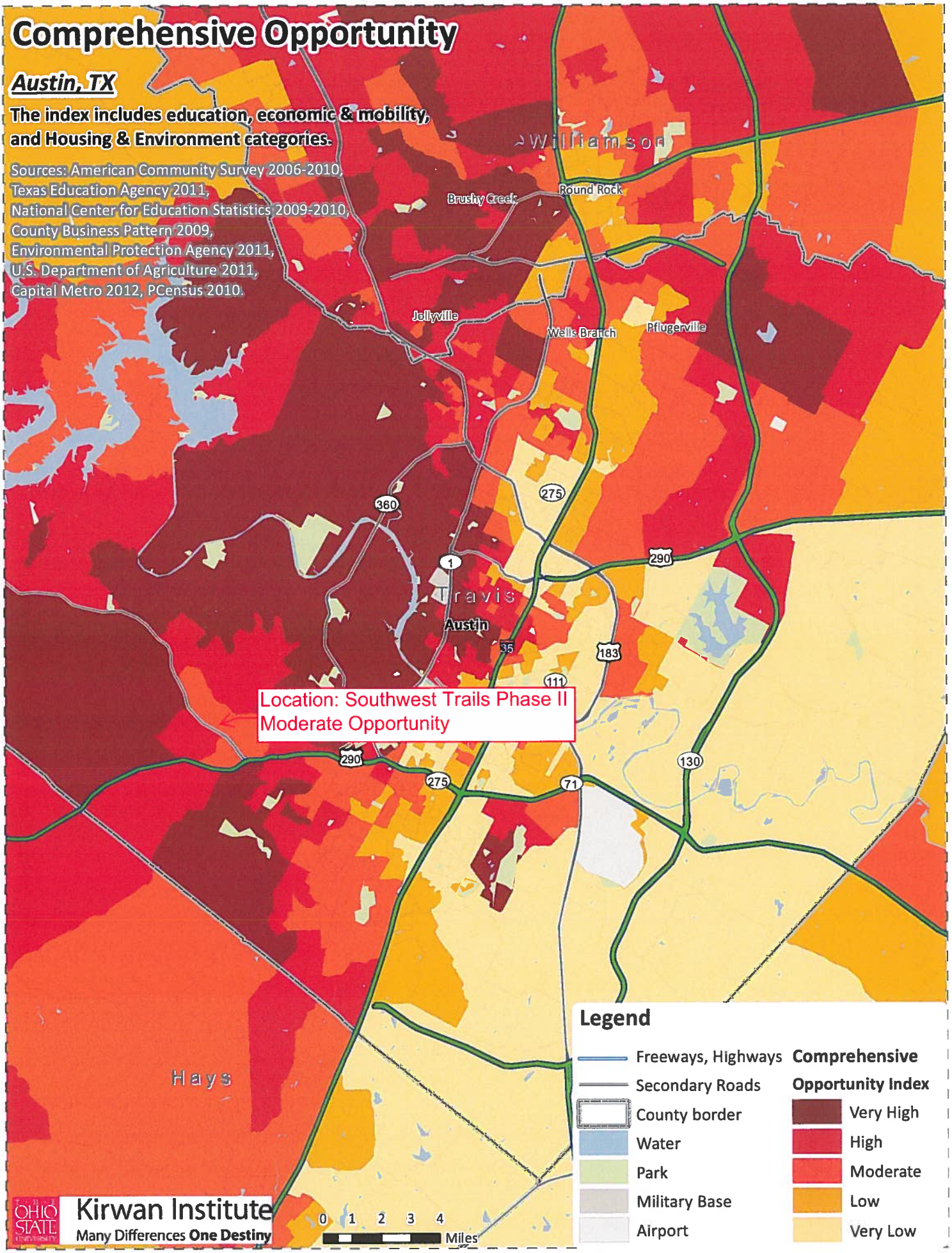
OPPORTUNITY MAP DOCUMENTATION

Comprehensive Opportunity

Austin, TX

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

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



Kirwan Institute
Many Differences **One Destiny**

ATTACHMENT 16:

OPERATING PROFORMA

TABLE D: OPERATING PROFORMA			
Unit Size (BR/BA)	Number of Units	Monthly Rental Income	Annual Rental Income
(1/1) 705 Sq Ft	12	$5,680	$68,160
	29	$15,178	$182,136
	17	$10,187	$122,244
FULL OCCUPANCY ANNUAL INCOME			$372,540
Less Vacancy Loss @ 7.50%			($27,941)
Other Income			$11,003
GROSS ANNUAL INCOME			$355,603

Inflation Factor - Income	2%
Inflation Factor - Expenses	3%

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 10	Year 15	Year 20	Year 25	Year 30
Gross Annual Income	$355,603	$362,715	$369,969	$377,368	$384,916	$424,978	$469,210	$518,046	$571,964	$631,495
EXPENSES										
Utilities	$35,422	$36,485	$37,579	$38,707	$39,868	$46,218	$53,579	$62,113	$72,006	$83,474
Insurance	$16,000	$16,480	$16,974	$17,484	$18,008	$20,876	$24,201	$28,056	$32,525	$37,705
Maintenance/Repair/Service Contracts	$45,148	$46,502	$47,898	$49,334	$50,814	$58,908	$68,290	$79,167	$91,777	$106,394
Turnover	$6,750	$6,953	$7,161	$7,376	$7,597	$8,807	$10,210	$11,836	$13,721	$15,907
Property Taxes	$38,305	$39,454	$40,638	$41,857	$43,113	$49,979	$57,940	$67,168	$77,866	$90,268
Management	$66,186	$68,172	$70,217	$72,323	$74,493	$86,358	$100,112	$116,058	$134,543	$155,972
Marketing	$2,475	$2,549	$2,626	$2,704	$2,786	$3,229	$3,744	$4,340	$5,031	$5,832
Maintenance Reserve	$17,400	$17,922	$18,460	$19,013	$19,584	$22,703	$26,319	$30,511	$35,371	$41,004
Administrative	$39,108	$40,281	$41,490	$42,734	$44,016	$51,027	$59,154	$68,576	$79,499	$92,161
Management Fee	$20,676	$21,296	$21,935	$22,593	$23,271	$26,977	$31,274	$36,255	$42,030	$48,724
Supportive Services	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
TOTAL EXPENSES	$287,470	$296,094	$304,977	$314,126	$323,550	$375,083	$434,824	$504,080	$584,367	$677,442
NET OPERATING INCOME (NOI)	$68,133	$66,620	$64,992	$63,242	$61,366	$49,895	$34,386	$13,965	($12,403)	($45,947)
Sources of Funds & Debt Service										
TOTAL ANNUAL Debt Service (DS)	$1.00	$1.00	$1.00	$1.00	$1.00	$1.00	$1.00	$1.00	$1.00	$1.00
Cash-flow after Debt Service (CF = NOI – DS)	$68,132	$66,619	$64,991	$63,241	$61,365	$49,894	$34,385	$13,964	($12,404)	($45,948)
Debt Coverage Ratio (DCR = NOI/DS)	68132.50	66620.45	64991.92	63241.99	61365.56	49894.76	34385.78	13965.31	(12403.01)	(45947.07)