

**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: Villages of Ben White

Project Address: 7000 East Ben White Boulevard Zip Code: 78741

Total # units in project/property: 183 Census Tract Number: 48453002312

Total # units to be assisted with RHDA Funding: 183

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

Acquisition  Rehabilitation  New construction  Refinance  Rent Buy-Down

Amount of funds requested: 1,000,000 Terms Requested: 40 year amortization, 0% int.  
10 year term

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

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

Austin Affordable Housing Corporation  **Developer**  **Consultant/Other**  
Name Applicant is (please check appropriate box):

1124 S IH35  
Street Address

Austin TX, 78704 512-477-4488  
City State, Zip Telephone

Ron Kowal 512-477-4488 ronk@hacanet.org  
Contact Person Contact Telephone E-mail address

[REDACTED] [REDACTED]  
Federal Tax ID Number D-U-N-S Number (REQUIRED - Visit [www.dnb.com](http://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.**

Austin Affordable Housing Corporation [Signature]  
Legal Name of Developer/Entity Signature of Authorized Officer

Vice President 11/3/14  
Title Date

LDG Multifamily, LLC  
Name

Developer

Consultant/Other

Applicant is (please check appropriate box):

1469 S. 4<sup>th</sup> Street

Street Address

Louisville

City

KY, 40208

State, Zip

502-931-5795

Telephone

Justin Hartz

Contact Person

502-931-5795

Contact Telephone

jhartz@ldgdevelopment.com

E-mail address

[REDACTED]  
Federal Tax ID Number

[REDACTED]  
D-U-N-S Number (REQUIRED - Visit [www.dnb.com](http://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.**

LDG Multifamily, LLC

Legal Name of Developer/Entity



Signature of Authorized Officer

Manager

Title

11-3-14

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?      \_\_\_ Yes      x No

If “Yes,” what level of restriction is intended?

\_\_\_ No smoking anywhere on the property, inside or outside

\_\_\_ No smoking Inside residents’ units

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

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

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

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

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

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

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

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

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

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

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

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

**A. Numbers of proposed PSH Units:**

183 Total Number of Units in project

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

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

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

NUMBER OF UNITS \_\_\_\_\_

Individuals or families headed by individuals that are:

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

NUMBER OF UNITS \_\_\_\_\_

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

NUMBER OF UNITS \_\_\_\_\_

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

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



- b. have experienced persistent instability as measured by frequent moves over such period; and
- c. can be expected to continue in such status for an extended period of time because of chronic disabilities, chronic physical health or mental health conditions, substance addiction, histories of domestic violence or childhood abuse, the presence of a child or youth with a disability, or multiple barriers to employment.

NUMBER OF UNITS \_\_\_\_\_

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

NUMBER OF UNITS \_\_\_\_\_

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

NUMBER OF UNITS   1  

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

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

- a. Describe the tenant population, income levels, and services, if any, to be provided to or made available to residents.
- b. Include the type of structure (multi-family or single-family), number and size of units in square feet.
- c. Indicate whether the property is occupied at the time this application is being submitted.
- d. Indicate whether the project meets the requirements of the City's Vertical Mixed-Use (VMU) Ordinance, or is in a Planned-Unit Development (PUD) or Transit Oriented Development (TOD), or is located less than .25 miles from a transit stop (not just a transit route).
- e. Indicate whether the project will preserve existing affordable rental units.
- f. If there are existing structures, provide documentation from the taxing authority or another third-party source indicating the year the structure was built.
- g. Indicate the number of units reserved for Housing Choice Voucher holders (Section 8).
- h. Indicate the number of units that are or will be made accessible and adaptable for persons with mobility, sight or hearing disabilities.
- i. Demonstrate the Project's compatibility with current Neighborhood Plan (if applicable).
- 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.

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

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

**5. Site Control and Demonstration of Value**

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

**6. Zoning**

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

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

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

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

- a. **Project management:** Justin Hartz was the Project Manager over LDG’s entire Texas portfolio, which includes 13 developments.
- b. **Market analysis:** Apartment MarketData, LLC is a 3<sup>rd</sup> party provider that provides market studies for each of our projects.
- c. **Site selection and control:** Justin Hartz oversees site selection and negotiates with owners and brokers to secure site control.
- d. **Planning and construction:** Justin Hartz oversees planning and construction for all Texas developments. We currently work with a 3<sup>rd</sup> party design/build firm as a part our planning and construction team. Weber Group, Inc. has worked on all of our Texas complexes along with our construction firm Xpert Design & Construction, LLC.
- e. **Design, architecture and engineering:** Justin Hartz entertains proposals and engages all services provided by architects and engineers.
- f. **Legal and accounting:** We utilize the services of Coats Rose for legal services and Novogradac for accounting services. Both LDG Multifamily LLC and AAHC have in-house accounting departments with extensive affordable housing knowledge.
- g. **Federal funding rules and:** Both LDG and AAHC have extensive knowledge of federal funding rules. We have developments funded with federal funds including HOME Funds, CDBG and HUD 221(d)4 and 223(f).
- h. **Other funding source rules (e.g. Low Income Housing Tax Credits):** Both LDG and AAHC have extensive knowledge of other funding source rules. We have been successful with rewards and development of projects with Low Income Housing Tax Credits, Private Activity Tax Exempt Bonds, TAX Credit Assistance Program (TCAP) and Section 1602 Program.

	<b>Name and Contact Information</b>	<b>MBE? (Mark X if Yes)</b>	<b>WBE? (Mark X if Yes)</b>	<b>Non- profit? (Mark X if Yes)</b>
Owner	Austin Affordable Housing Corporation Ron Kowal 512-477-4488, ronk@hacanet.org			<b>x</b>
Developer(s)	Austin Affordable Housing Corporation Ron Kowal 512-477-4488, ronk@hacanet.org LDG Multifamily, LLC Justin Hartz 502-931-5795, jhartz@ldgdevelopment.com			<b>AAHC is NFP</b>
Architect	Kentucky Architecture Studio LLC Anthony Butler 502-589-8007 tony@studioaarch.com			
Engineer	Conley Engineering Carl Conley 512-328-3506, cconley@conleyengineering.com			
Construction Lender	Redstone Company Cody Langeness 212-297-1800;			

	clangeness@redstoneco.com			
Tax Credit Syndicator	R4 BWS Acquisition LLC Jay Siegel 617-502-5946 jsegel@r4cap.com			
Attorney	Coats Rose Yale & Lyman PC William Walter 512-684-3842; wwalter@coatsrose.com			
Accountant	Novogradac Company LLP Kyle Zochert 512-340-0420; kyle.zochert@novoco.com			
General Contractor	Xpert Design & Construction LLC Justin Hartz 502-931-5795; jhartz@ldgdevelopment.com			
Consultant (if Applicable)	<b>N/A</b>			
Property Management Provider	Capstone Real Estate Services, Inc. Christie Powell 512-646-6700; <a href="mailto:Christie.powell@capstonemanagement.com">Christie.powell@capstonemanagement.com</a>			
Market Analyst	Apartment Market Data, LLC Kirk Shell 512-262-7627 Kirt02@hotmail.com			
Surveyor	Landmark Surveying, LP 512-328-7411		<b>x</b>	

**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.

	<b>DATE(S)</b>
Acquisition and/or holding	<b>9/2014</b>
Environmental and/or historic review (AHFC)	<b>5/2014</b>
Securing and packaging project financing	<b>5/2014</b>
Construction Specifications and Cost estimates	<b>4/2014</b>
Construction Bids	<b>5/2014</b>
Construction Start	<b>9/2014</b>
Anticipated Draws (list all)	<b>10/2015</b>
End Construction	<b>10/2015</b>
Start of Rent-up	<b>6/2015</b>
Completion & Operation	<b>9/2016</b>

**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.

- 170 \_\_\_\_\_ Units adaptable for persons with mobility disabilities
- 13 \_\_\_\_\_ Units accessible for persons with mobility disabilities
- \_\_\_\_\_ Units adaptable for persons with sight and hearing disabilities
- 4 \_\_\_\_\_ 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.

Most recently, LDG Multifamily, LLC developed Villas at Colt Run located in Houston, Texas and Paddock at Norwood in Austin, Texas. Villas at Colt Run is a 130 unit multifamily development funded with Private Activity Tax-Exempt bonds, 4% Low Income Housing Tax Credits and HOME Funds awarded by the City of Houston. Paddock at Norwood

is a 228 unit multifamily development co-developed with Strategic Housing Finance Corporation. The project was funded with Private Activity Tax Exempt bonds and 4% Low Income Housing Tax Credits. Both projects are currently under construction. LDG's portfolio also includes projects financed with 9% Low-Income Housing Tax Credits. LDG's entire Texas portfolio is managed by Capstone Real Estate Services, Inc. LDG's in-house asset manager previously worked for Capstone and works closely with Capstone to ensure successful operation and compliance at the property.

**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.

<b>DETAILED PROJECT BUDGET</b>				
	<b>Cost</b>	<b>Prior award of RHDA Funds (if any)</b>	<b>RHDA Funds Requested</b>	<b>Description or Comments</b>
<b>PREDEVELOPMENT</b>				
Appraisal	6500	0	0	
Environmental Review	2500	0	0	
Engineering	160000	0	0	
Survey	15000	0	0	
Architectural	808919	0	0	
<b>TOTAL PREDEVELOPMENT</b>	<b>992,919</b>	<b>0</b>	<b>0</b>	
<b>ACQUISITION</b>				
Site and/or Land	1500000	0	0	
Structures	0	0	0	
Other (specify)	0	0	0	
<b>TOTAL ACQUISITION</b>	<b>1,500,000</b>	<b>0</b>	<b>0</b>	
<b>HARD COSTS</b>				
Infrastructure	0	0	0	
Site work	2524331	0	0	
Demolition	0	0	0	
Concrete	1898072	0	0	
Masonry	993335	0	0	
Rough carpentry	2448059	0	0	
Finish carpentry	650885	0	0	
Waterproofing & Insulation	893407	0	0	
Roofing & Sheet Metal	994196	0	0	
Plumbing/Hot Water	1155955	0	0	
HVAC	789405	0	0	
Electrical	969310	0	0	
Doors/Windows/Glass	828704	0	0	
Lath & Plaster/ Drywall & Acoustical	1341876	0	0	
Tile work	0	0	0	
Soft & Hard Floor	0	0	0	
Paint/Decorating/Blinds/Shades	0	0	0	
Specialties/Special Equipment	375779	0	0	
Cabinetry/Appliances	257570	0	0	
Carpet	0	0	0	
Other (Please specify)	2388248	0	0	Construction General Requirements, Overhead, Profit
Construction Contingency	838032	0	0	
<b>TOTAL CONSTRUCTION</b>	<b>19,347,164</b>	<b>0</b>	<b>0</b>	
<b>SOFT &amp; CARRYING COSTS</b>			<b>0</b>	

Legal	300000	0	0	
Audit/Accounting	10000	0	0	
Title/Recording	125000	0	0	
Architectural (Inspections)	6000	0	0	
Construction Interest	1049625	0	0	
Construction Period Insurance	130000	0	0	
Construction Period Taxes	0	0	0	
Relocation	0	0	0	
Marketing	0	0	0	
Davis-Bacon Monitoring	10000	0	0	
Other: (Specify)	92500	0	0	Market analysis, soils report, feasibility report, contingency
Other Construction/Perm Loan Costs	583300	0	0	Application fees, origination fees,
Other Financing Fees	855768	0	0	Tax credit fees, credit enhancement fees, underwriting & issuance fees, syndication costs, tax opinion
Developer Fees	3400000	0	0	
Reserves	1000458	0	0	
<b>TOTAL PROJECT BUDGET</b>	<b>29,402,734</b>	<b>0</b>	<b>1,000,000</b>	

**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.).

<b>TABLE A: SOURCES OF FUNDS SUMMARY</b>					<b>Intended Use of Funds (Predevelopment, Acquisition, Construction, Soft Costs)</b>
	Term	Interest Rate	Amount	Evidence (Deed, Sales Contract)	
Owner Equity (tax credit equity)	<b>0</b>	<b>0%</b>	<b>10,548,062</b>	<b>LOI/Committed</b>	<b>Predevelopment, construction, soft costs</b>
Private Financing (List Lenders)					
Redstone Company	<b>40</b>	<b>6.00%</b>	<b>15,160,000</b>	<b>LOI/Committed</b>	<b>Predevelopment, Acquisition, Construction, soft costs</b>
Other Sources (List Below)					
Deferred Developer Fee	<b>15</b>	<b>0%</b>	<b>2,694,672</b>	<b>Committed</b>	<b>Predevelopment, construction, soft costs</b>
<b>Proposed RHDA Funds</b>	<b>10</b>	<b>0%</b>	<b>1,000,000</b>	<b>Requesting</b>	<b>construction</b>
<b>TOTAL</b>			<b>29,402,734</b>		

<b>TABLE B: USES OF FUNDS SUMMARY</b>	
	Total Cost
	Cost/Unit

Predevelopment	<b>992,919</b>	<b>5,426</b>
Acquisition	<b>1,500,000</b>	<b>8,197</b>
Hard Costs	<b>19,347,164</b>	<b>105,722</b>
Soft & Carrying Costs	<b>7,562,651</b>	<b>41,326</b>
TOTAL	<b>29,402,734</b>	<b>160,670</b>

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

<b>TABLE C: PERCENTAGE OF RHDA FUNDS</b>	
<b>RHDA Funds</b>	<b>1,000,000</b>
<b>Other Funds</b>	<b>28,402,734</b>
<b>Total Project Cost</b>	<b>29,402,734</b>
<b>RHDA Funds ÷ Total Project Cost=</b>	<b>3.40</b>

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

<b>TABLE D: OPERATING PROFORMA</b>			
<b>Unit Size (BR/BA)</b>	<b>Number of Units</b>	<b>Monthly Rental Income</b>	<b>Annual Rental Income</b>
<b>FULL OCCUPANCY ANNUAL INCOME</b>			
<b>Less Vacancy Loss (Indicate % and Amount of Loss</b>			
<b>GROSS ANNUAL INCOME</b>			

<b>Inflation Factor - Income</b>	
<b>Inflation Factor - Expense</b>	

	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
<b>Gross Annual Income</b>					
<b>EXPENSES</b>					
Utilities					
Insurance					
Maintenance/Repair					
Property Taxes					
Management					
Marketing					
Maintenance Reserve					
Other (specify)					
Other (specify)					



<b>TOTAL EXPENSES</b>					
<b>NET OPERATING INCOME (NOI)</b>					
<b>Sources of Funds &amp; Debt Service</b>					
<b>TOTAL ANNUAL Debt Service (DS)</b>					
<b>Cash-flow after Debt Serv (CF = NOI - DS)</b>					
<b>Debt Coverage Ratio (DCR = NOI/DS)</b>					

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

**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. **See Tab 15 for a description of the supportive services.**
- b. The number and types of residents/clients expected to be served annually. **The number of residents served will fluctuate based on the occupancy of the complex. Because this is a senior development, we anticipate the type of residents to be served to be seniors and persons with disabilities.**
- c. Describe the developer’s experience and qualifications in providing the services to be offered. **The Housing Authority of the City of Austin dedicates four of its 19 development to housing the senior and disabled population. In addition to those four sites, all 19 of HACA’s communities include senior citizens. Services HACA currently provide to senior residents include Senior Mayfest, Health and Safety Fairs and Elders Living Well Program.**
- d. If services are not provided by the developer of the project, include a description of the organization(s) providing the services and a memorandum of understanding or some other type of agreement that indicates the relationship between the developer and service provider. **Services will be provided by HACA.**
- 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.
- 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. **Please see operating budget.**
  - 2. Budget: Include a supportive services budget which reflects current and anticipated funding and expenses associated with the provision of services for three (3) years.

**ATTENTION:**

**Please submit with the Application a completed “self-evaluation” using the following Scoring Criteria.**

**RHDA PROGRAM  
SCORING CRITERIA**

**REQUIRED INFORMATION:**

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

**EVALUATION CRITERIA:**

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

**CORE VALUES POINTS**

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

Score

**1. AFFORDABLE UNITS** (maximum 25 points)   10   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

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

Score

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

**25 points:** Affordability period is:

  X   99 years;

**OR**

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

Score

**3. GEOGRAPHIC DISPERSION** (maximum 25 points) 10

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

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

**INITIATIVES AND PRIORITIES POINTS**

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

Score

**4. PERMANENT SUPPORTIVE HOUSING (PSH)** (maximum 25 points) 10

**25 points:** "Housing First" model.

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

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

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

Score

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

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

Score

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

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

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

Score

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

**10 points:** Project is:

\_\_\_\_\_ located in a Vertical Mixed-Use (VMU) Corridor; or  
 \_\_\_\_\_ a Planned-Unit Development (PUD); or  
 \_\_\_\_\_ located within a Transit-Oriented Development (TOD) area, or  
10 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) 10

**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)** 4 \_\_\_\_\_

- 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 \_\_\_\_\_

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

Score

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

**New construction**

**2 points each; maximum 10 points**

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

**Acquisition and Rehab**

**2 points each; maximum 10 points**

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

**Acquisition of Completed Units**

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

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

Score

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

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

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

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

Score

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

**15 points:**

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

**10 points:**

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

**5 points:**

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

Score

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

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

**TOTAL SCORE** 150





## 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 Austin Affordable Housing Corporation (file number [REDACTED]), a Domestic Nonprofit Corporation, was filed in this office on September 10, 2003.

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 20, 2014.



*NANDITA BERRY*

Nandita Berry  
Secretary of State

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date:

**AUG 17 2004**

AUSTIN AFFORDABLE HOUSING CORP  
PO BOX 6159  
AUSTIN, TX 78762

Employer Identification Number:

DLN:

17053068013034

Contact Person:

GARY L BOTKINS

ID# 31463

Contact Telephone Number:

(877) 829-5500

Accounting Period Ending:

March 31

Public Charity Status:

509(a)(3)

Form 990 Required:

No

Effective Date of Exemption:

September 10, 2003

Contribution Deductibility:

Yes

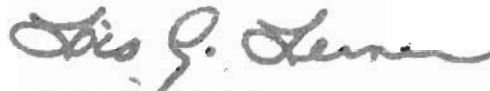
Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

Sincerely,



Lois G. Lerner  
Director, Exempt Organizations  
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)

Letter 947 (DO/CG)



## Office of the Secretary of State

### Certificate of Fact

The undersigned, as Secretary of State of Texas, does hereby certify that the document, Application for Registration for LDG Multifamily, LLC (file number [REDACTED]), a KENTUCKY, USA, Foreign Limited Liability Company (LLC), was filed in this office on January 31, 2007.

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 20, 2014.



*NANDITA BERRY*

Nandita Berry  
Secretary of State

**Villages of Ben White**  
**Development Narrative**

The Villages of Ben White, to be located at 7000 E. Ben White Boulevard, Travis County, Austin, Texas is a new construction multifamily development comprised of 183 senior units in one contiguous interior corridor residential building on approximately 11.32 acres. The Development will serve senior, homeless and disabled residents with the following area median income, unit mix and square footages.

<b>AMI (MFI)</b>	<b># OF UNITS</b>	<b># OF BDRMS</b>	<b># OF BATHS</b>	<b>SQ. FOOTAGE</b>	<b>TOTAL SQ. FOOTAGE</b>
60%	46	1	1.0	635	35,560
30%	1	1	1.0	710	710
50%	16	1	1.0	714	4,284
60%	100	2	2.0	957	111,012
60%	18	2	2.0	1148	2,296
30%	2	2	2.0	1136	2,272

A total of 19 units will be RHDA-assisted units occupied by households with incomes at or below 50% of the area median income for the Austin-Round Rock MSA.

The project includes (13) fully-accessible units and (170) adaptable units for persons with mobility disabilities, in accordance with the Uniform Federal Accessibility Standard (UFAS), which is the national standard for accessible features of dwelling units which utilize federal funds. Additionally, 2% of the units will be accessible for persons with hearing or visual disabilities. All of the remaining first floor units are designed per the design guidelines of the Fair Housing Act. The FHA guidelines include accessible building/unit entrances on an accessible route, useable doors 32” clear width and clear maneuvering spaces in kitchens and bathrooms.

The total development cost of the property is approximately \$29,402,734. The project will secure a construction/permanent loan from Redstone in the approximate amount of \$15,160,000 from the sale of federal tax-exempt bonds. The sale of Federal Housing Tax Credits will generate \$10,548,062 of investor capital from R4 Capital. The Developer will defer \$2,694,672 of its Developer Fee. \$1,000,000 of loan financing from the City of Austin is intended to be used to finance construction of the project. The loan is anticipated to be at zero percent interest for a term of 10 years. The applicant is in the process of finalizing all financing commitments from the lender and investor.

One supportive housing unit will be reserved for a homeless veteran utilizing the HUD Veterans Affairs Supportive Housing (VASH) Program. The program combines Housing Choice Voucher rental assistance for homeless Veterans with case management and clinical services provided by the Department of Veterans Affairs. The Housing Authority of the City of Austin dedicates four of its 19 development to housing the senior and disabled population. In addition to those four sites, all 19 of HACA's communities include senior citizens. Services HACA currently provide to senior residents include Senior Mayfest, Health and Safety Fairs and Elders Living Well Program. All Austin Affordable Housing Corporation (AAHC) properties participate in single-stream recycling programs. Residents are invited several times a year to participate in seminars on energy efficiency and water savings techniques to implement in their homes. Through partnerships with neighborhood banks, the sites provide free basic money management training which includes check-book balancing, household budgeting and savings opportunities. Additionally, the sites host semi-annual job fairs, in which local businesses such as restaurants, retailers, grocery stores, banks and early childhood education facilities are invited. Partnerships have also been formed with ACC campuses to educate residents on resume preparation and basic interview techniques. AAHC and its residents also support various service projects each year including Turkeys Tackling Hunger, Toys for Tots, Blue Santa and Coats for Kids as well as annual school supply drives and Red Cross donation drives.

The sites also offer services through CARES teams designed to meet the life needs of residents and provide additional support to the staff. Resident Care includes providing a caring touch during times such as life transitions, job loss, the birth of a baby, etc., which can be critical times in the life of a resident and ultimately affect their housing decisions. Tuesday Tutoring, Zumba, Cookie Swap, Blanket Drive were some of the events held in 2013.

In addition, each apartment staff hosts:

- Various health-awareness seminars focusing on proper nutrition and exercise habits
- "Spring" themed events from Easter egg hunts to sessions with home & finance organization experts
- "Welcome to Summer" parties in which the Fire Department representatives visit each site, conducting fire-safety awareness visits allowing residents an opportunity to tour a working fire and rescue vehicle and receive fire-safety tips
- "National Night Out" Parties including food, games and prizes with visits from the Austin Police Department, Austin Fire Department and Travis County Sheriff's office
- Financial Literacy Awareness week in April, partnering with Financial Fitness Greater Austin to offer financial literacy classes

AAHC's staff also offers the following programs to Housing Authority of the City of Austin (HACA) public housing and Section 8 residents:

- Six-Star Program – See Attached Flyer
- Down Payment Assistance Program – See Attached Flyer
- Equity CLT Program – See Attached Flyer

Currently, the nearest Capital Metro Transit Stop is within .25 miles of the property. As an added service to the residents, Capital Metro and Austin Affordable Housing Corporation are collaboratively working to place a stop within the property.

The property is new construction and will be unoccupied at the time this application is submitted. It does not meet the requirements of the City's Vertical Mixed-Use (VMU) Ordinance, Planned-Unit Development (PUD) or Transit Oriented Development (TOD). There are no units reserved for Housing Choice Voucher holders at this time.



## VASH (Veterans Affairs Supportive Housing) Summary

The HUD-Veterans Affairs Supportive Housing (HUD-VASH) program combines Housing Choice Voucher (HCV) rental assistance for homeless Veterans with case management and clinical services provided by the Department of Veterans Affairs (VA). VA provides these services for participating Veterans at VA medical centers (VAMCs) and community-based outreach clinics.

Every year since 2008, HUD and VA have awarded HUD-VASH vouchers based on geographic need and public housing agency (PHA) administrative performance. The allocation process for HUD-VASH vouchers is a collaborative approach that relies on three sets of data: HUD's point-in-time data submitted by Continuums of Care (CoCs), VAMC data on the number of contacts with homeless Veterans, and performance data from PHAs and VAMCs. After determining which areas of the country have the highest number of homeless Veterans, the VA Central Office identifies VA facilities in the corresponding communities. HUD then selects PHAs near to the identified VA facilities, taking into consideration the PHAs' administrative performance, and sends the PHAs invitations to apply for the vouchers. Currently, the Housing Authority of the City of Austin has 355 VASH vouchers.

Updated information can be found at the VASH portal on the HUD website: [http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/programs/hcv/vash](http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/hcv/vash)

### Process to receive VASH assistance

1. The VA determines initial eligibility for the program. The VA identifies eligible homeless veterans and refers the veteran to the Housing Authority.
2. Veterans locate a unit to lease in the private rental market. The VA's caseworker helps with the housing search and finding services to help veterans move into a new unit.
3. Veterans pay approximately 30% of their adjusted income to the property owner and the Housing Authority of the City of Austin pays the remaining rent to the owner on the first of the month. Rental assistance provided follows the regular Housing Choice Voucher rules and guidelines.
4. Each unit assisted is required to pass a housing quality standards inspection.

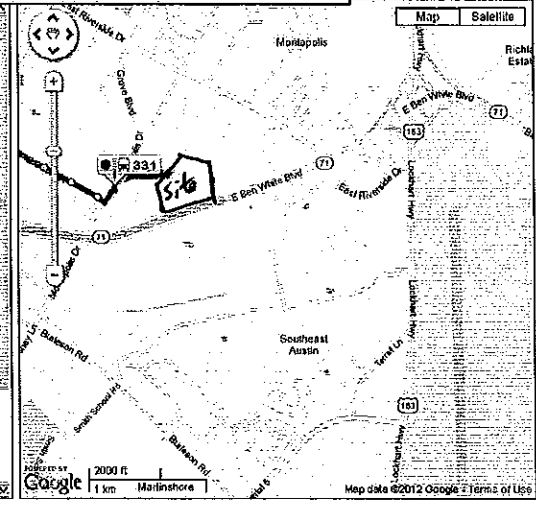
### History of VASH vouchers allocated to the Housing Authority of the City of Austin

Effective date	# of units
11/1/2013	50
7/1/2013	35
4/1/2012	100
8/1/2011	50
7/1/2010	50
10/1/2009	70
Total vouchers	<b>355</b>



Trip from STOP #2230 (2800 MONTOPOLIS & OLTORF) to MCDONALD'S - E BEN WHITE on 8/27/2012 departing after 12:02 PM

Location: (street address, intersection, landmark or stop #)  
 Starting: ● STOP #2230 (2800 MONTOPOLIS & OLTORF)  
 Ending: ●  
 Depart now  Time: 12:02 PM + 15 minutes  
 Date: 8/27/2012 + 1 day  
 Set advanced options  
 Show:  Map  Service Area  Transit Hubs  Bike Paths  
**GO** **RESET**



Itinerary 1 | Itinerary 2 | Itinerary 3

All times are estimated. Please arrive at transit stop 5 to 10 minutes early.

<b>331-OLTORF-WB</b>		
Depart: 2800 MONTOPOLIS & OLTORF		11:05 AM
Arrive: 2502 OLTORF & PLEASANT VALLEY		11:11 AM
Transfer:		
<b>300-GOVALLE-SB</b>		
Depart: 2502 OLTORF & PLEASANT VALLEY		11:21 AM



Schedules and Maps

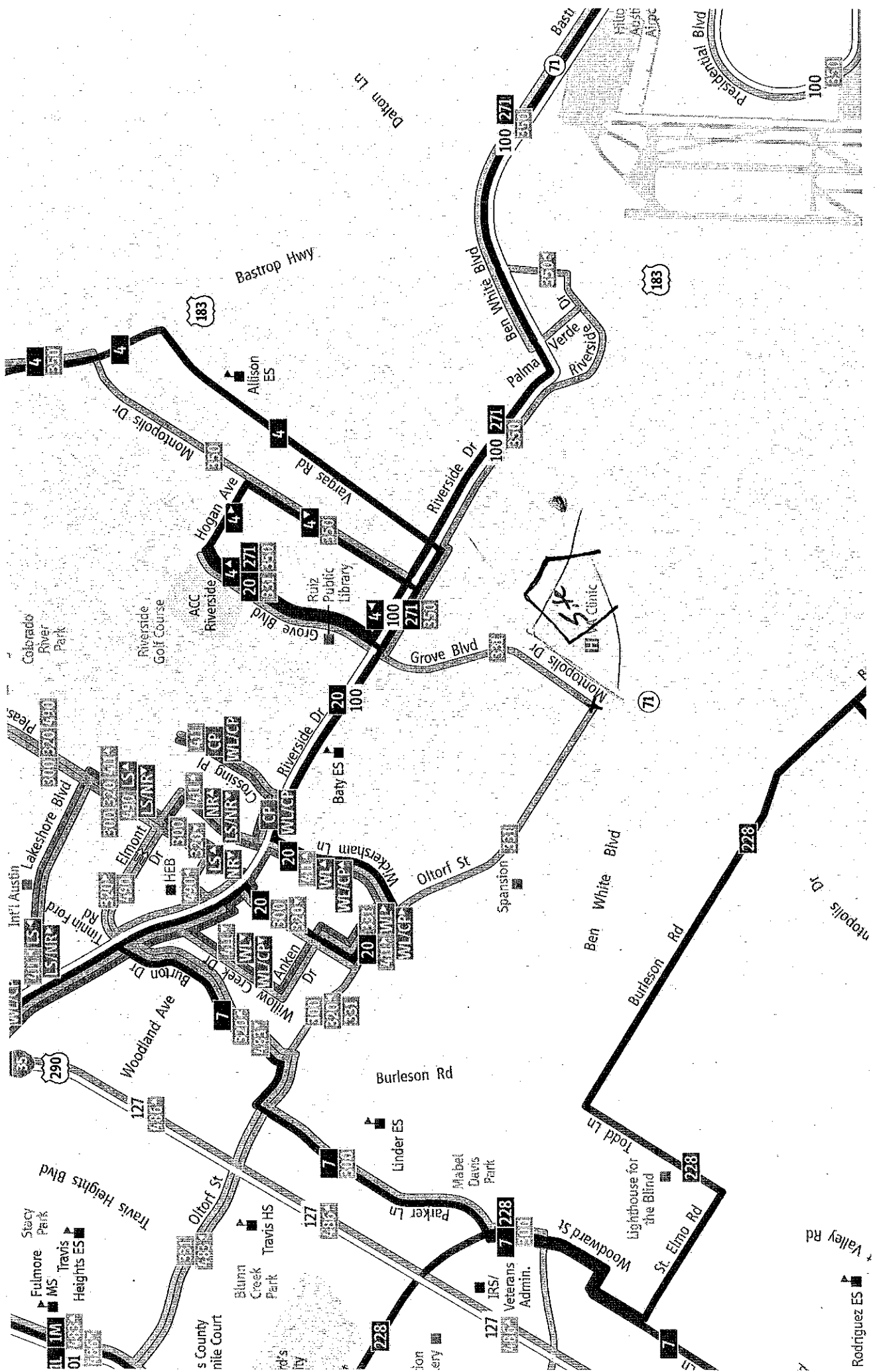
- MetroBike
- MetroRail
- UT Shuttles
- Schedule Book

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- Leadership
- Data and Statistics
- Finance and Audit Info
- Sunset Commission Progress Report
- Media Center
- Jobs at Capital Metro

Public Involvement

- Board Meetings
- Community Involvement
- Access Advisory Committee
- Customer Satisfaction Advisory Committee
- Contact Us



# CITY OF AUSTIN DEVELOPMENT WEB MAP



## Legend

-  Lot Lines
-  Streets
-  Building Footprints
-  Named Creeks
-  Lakes and Rivers
-  Parks
-  County

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 THE CITY OF AUSTIN FOR THE SOLE PURPOSE OF GEOGRAPHIC REFERENCE. NO WARRANTY IS MADE BY THE CITY OF AUSTIN REGARDING SPECIFIC ACCURACY OR COMPLETENESS.

Trip Planner

Schedule / Next Trip

Service Nearby



Trip Planner: Get step by step travel directions for using Capital Metro routes

Location: (street address, intersection, landmark or stop #)

Starting: 6310 E BEN WHITE BLVD

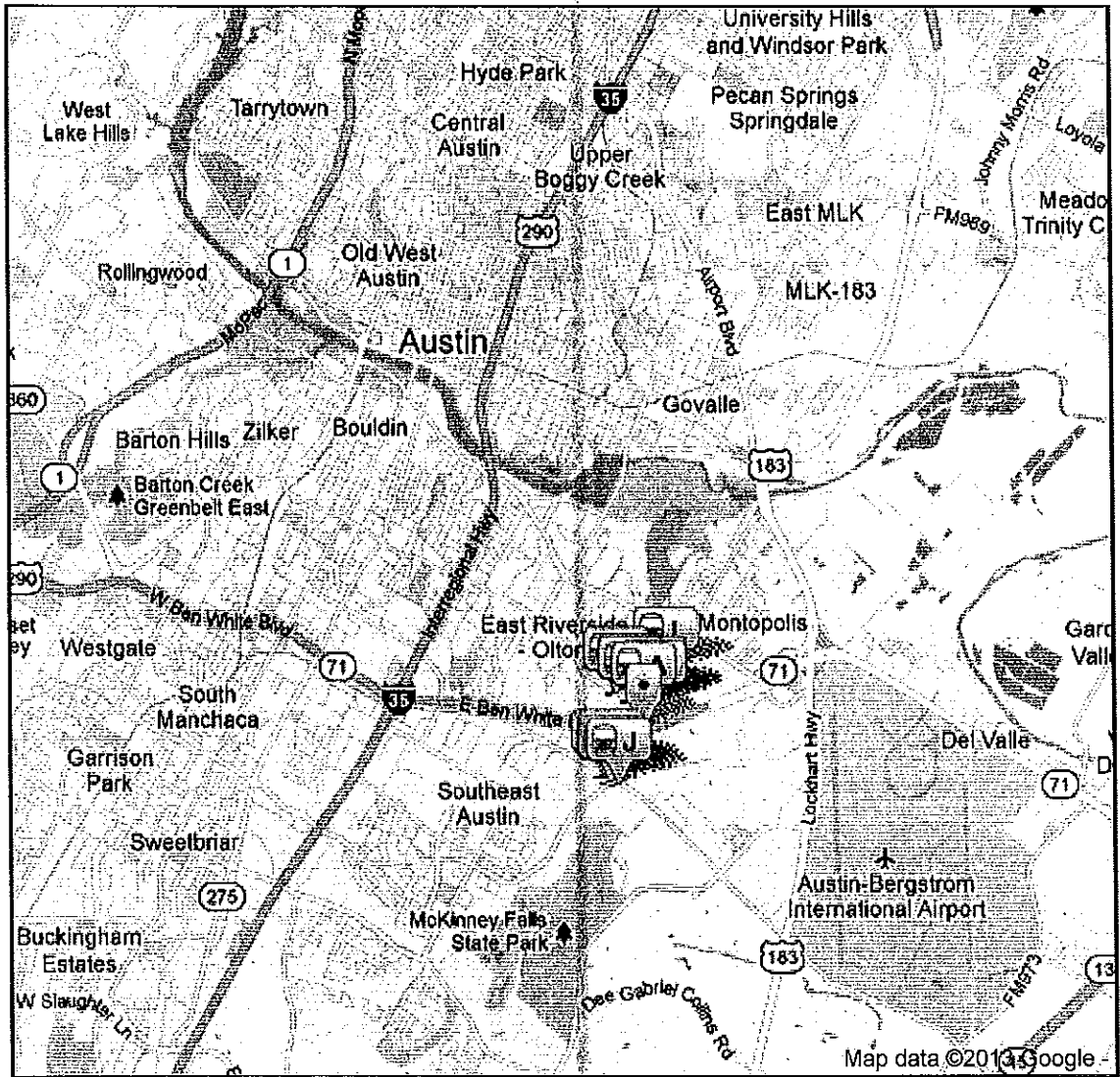
Ending:

Depart

Show:

No transit stops were found within the specified walking distance. Here are the nearest stops to your location:

-  6220 OLTORF & MONTOPOLIS *0.21mi*
-  2821 MONTOPOLIS & OLTORF *0.26mi*
-  6101 OLTORF & ALVIN DEVANE *0.29mi*
-  2800 MONTOPOLIS & OLTORF *0.3mi*
-  6100 OLTORF & MONTOPOLIS *0.32mi*
-  6001 OLTORF & ALVIN DEVANE *0.44mi*
-  6000 OLTORF & MONTOPOLIS *0.45mi*
-  MONTOPOLIS/BURLESON02 *0.54mi*
-  BURLESON & MONTOPOLIS *0.57mi*
-  BURLESON & STASSNEY *0.58mi*
-  MONTOPOLIS/BURLESON *0.6mi*
-  2410 GROVE & MONTOPOLIS *0.61mi*





Yahoo Search

**Travis CAD**

**Property Search Results > 445975 CSK PARTNERS LLC for Year 2014**

**Property**

**Account**

Property ID: 445975 Legal Description: LOT 2 BLK A TRAVIS 51 ADDN NO 2  
 Geographic ID: 0315110217 Agent Code: ID:1492635  
 Type: Real  
 Property Use Code:  
 Property Use Description:

**Location**

Address: 7016 E BEN WHITE BLVD Mapsco: 646E  
 AUSTIN, TX 78741  
 Neighborhood: #71E Map ID: 031511  
 Neighborhood CD: #71E

**Owner**

Name: CSK PARTNERS LLC Owner ID: 1389128  
 Mailing Address: % Ownership: 100.0000000000%  
 4320 INDUSTRIAL DR  
 FORT SMITH , AR 72916-9194

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: CSK PARTNERS LLC  
 % Ownership: 100.0000000000%  
 Total Value: N/A

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
02	CITY OF AUSTIN	N/A	N/A	N/A	N/A
03	TRAVIS COUNTY	N/A	N/A	N/A	N/A

06	DEL VALLE ISD	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	4.1340	180077.04	65340.00	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	\$1,035,443	0	1,035,443	\$0	\$1,035,443
2012	\$0	\$264,333	0	264,333	\$0	\$264,333
2011	\$0	\$264,333	0	264,333	\$0	\$264,333
2010	\$0	\$264,333	0	264,333	\$0	\$264,333
2009	\$0	\$264,333	0	264,333	\$0	\$264,333

### Deed History - (Last 3 Deed Transactions)

#	Deed Date	Type	Description	Grantor	Grantee	Volume	Page	Deed Number
1	1/1/2011							
2	8/30/2007	CD	CORRECTION DEED	BEN WHITE LAND L P	CSK PARTNERS LLC			2008086429TR
3	8/30/2007	SW	SPECIAL WARRANTY DEED	BEN WHITE LAND L P	CSK PARTNERS LLC			2007164924TR

**Questions Please Call (512) 834-9317**

This site requires cookies to be enabled in your browser settings.

**This year is not certified and ALL values will be represented with "N/A".**

**Travis CAD**

**Property Search Results > 292079 CSK PARTNERS LLC for Year 2013**

**Property**

**Account**

Property ID: 292079      Legal Description: LOT 1 BLK A TRAVIS 51 ADDN NO 2  
 Geographic ID: 0315110209      Agent Code: ID:1492635  
 Type: Real  
 Property Use Code:  
 Property Use Description:

**Location**

Address: 7000 E BEN WHITE BLVD      Mapsco: 646E  
 TX 78741  
 Neighborhood: #71E      Map ID: 031511  
 Neighborhood CD: #71E

**Owner**

Name: CSK PARTNERS LLC      Owner ID: 1389128  
 Mailing Address:      % Ownership: 100.0000000000%  
 4320 INDUSTRIAL DR  
 FORT SMITH , AR 72916-9194  
 Exemptions:

**Values**

(+) Improvement Homesite Value: + \$0  
 (+) Improvement Non-Homesite Value: + \$0  
 (+) Land Homesite Value: + \$0  
 (+) Land Non-Homesite Value: + \$1,493,323 Ag / Timber Use Value  
 (+) Agricultural Market Valuation: + \$0 \$0  
 (+) Timber Market Valuation: + \$0 \$0  
 -----  
 (=) Market Value: = \$1,493,323  
 (-) Ag or Timber Use Value Reduction: - \$0  
 -----  
 (=) Appraised Value: = \$1,493,323  
 (-) HS Cap: - \$0  
 -----  
 (=) Assessed Value: = \$1,493,323

**Taxing Jurisdiction**

Owner: CSK PARTNERS LLC  
 % Ownership: 100.0000000000%  
 Total Value: \$1,493,323

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax
01	AUSTIN ISD	1.242000	\$119,466	\$119,466	\$1,483.77
02	CITY OF AUSTIN	0.502700	\$1,493,323	\$1,493,323	\$7,506.93
03	TRAVIS COUNTY	0.494600	\$1,493,323	\$1,493,323	\$7,385.97
06	DEL VALLE ISD	1.470000	\$1,373,857	\$1,373,857	\$20,195.70
0A	TRAVIS CENTRAL APP DIST	0.000000	\$1,493,323	\$1,493,323	\$0.00
2J	TRAVIS COUNTY HEALTHCARE DISTRICT	0.129000	\$1,493,323	\$1,493,323	\$1,926.38
68	AUSTIN COMM COLL DIST	0.094900	\$1,493,323	\$1,493,323	\$1,417.16
Total Tax Rate:		3.933200			
Taxes w/Current Exemptions:					\$39,915.91

Taxes w/o Exemptions: \$39,915.93

**Improvement / Building**

No improvements exist for this property.

**Land**

#	Type	Description	Acres	Sqft	Eff Front	Eff Depth	Market Value	Prod. Value
1	LAND	Land	2.0000	87120.00	87120.00	0.00	\$500,940	\$0
2	LAND	Land	22.7820	992383.00	992383.00	0.00	\$992,383	\$0

**Roll Value History**

Year	Improvements	Land Market	Ag Valuation	Appraised	HS Cap	Assessed
2014		N/A	N/A	N/A	N/A	N/A
2013		\$0	\$1,493,323	0	1,493,323	\$0 \$1,493,323
2012		\$0	\$1,080,000	0	1,080,000	\$0 \$1,080,000
2011		\$0	\$1,080,000	0	1,080,000	\$0 \$1,080,000
2010		\$0	\$1,080,000	0	1,080,000	\$0 \$1,080,000
2009		\$0	\$1,080,000	0	1,080,000	\$0 \$1,080,000

**Deed History - (Last 3 Deed Transactions)**

#	Deed Date	Type	Description	Grantor	Grantee	Volume	Page	Deed Number
1	1/1/2011							
2	8/30/2007	CD	CORRECTION DEED	7000 BEN WHITE BLVD LP	CSK PARTNERS LLC			2008086429TR
3	8/30/2007	SW	SPECIAL WARRANTY DEED	7000 BEN WHITE BLVD LP	CSK PARTNERS LLC			2007164924TR

**Questions Please Call (512) 834-9317**

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Database last updated on: 1/17/2014 3:36 AM

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**Travis CAD**

**Property Search Results > 292078 CSK PARTNERS LLC for Year 2013**

**Property**

**Account**

Property ID: 292078      Legal Description: 2.5020A OF LOT 1 A H C ADDN  
 Geographic ID: 0315110208      Agent Code: ID:1492635  
 Type: Real  
 Property Use Code:  
 Property Use Description:

**Location**

Address: E BEN WHITE BLVD      Mapsco: 646E  
 TX 78741  
 Neighborhood: #71E      Map ID: 031511  
 Neighborhood CD: #71E

**Owner**

Name: CSK PARTNERS LLC      Owner ID: 1389128  
 Mailing Address:      % Ownership: 100.0000000000%  
 4320 INDUSTRIAL DR  
 FORT SMITH , AR 72916-9194  
 Exemptions:

**Values**

(+) Improvement Homesite Value: + \$0  
 (+) Improvement Non-Homesite Value: + \$0  
 (+) Land Homesite Value: + \$0  
 (+) Land Non-Homesite Value: + \$626,675 Ag / Timber Use Value  
 (+) Agricultural Market Valuation: + \$0 \$0  
 (+) Timber Market Valuation: + \$0 \$0  
 -----  
 (=) Market Value: = \$626,675  
 (-) Ag or Timber Use Value Reduction: - \$0  
 -----  
 (=) Appraised Value: = \$626,675  
 (-) HS Cap: - \$0  
 -----  
 (=) Assessed Value: = \$626,675

**Taxing Jurisdiction**

Owner: CSK PARTNERS LLC  
 % Ownership: 100.0000000000%  
 Total Value: \$626,675

Entity	Description	Tax Rate	Appraised Value	Taxable Value	Estimated Tax	
02	CITY OF AUSTIN	0.502700	\$626,675	\$626,675	\$3,150.30	
03	TRAVIS COUNTY	0.494600	\$626,675	\$626,675	\$3,099.54	
06	DEL VALLE ISD	1.470000	\$626,675	\$626,675	\$9,212.12	
0A	TRAVIS CENTRAL APP DIST	0.000000	\$626,675	\$626,675	\$0.00	
2J	TRAVIS COUNTY HEALTHCARE DISTRICT	0.129000	\$626,675	\$626,675	\$808.41	
68	AUSTIN COMM COLL DIST	0.094900	\$626,675	\$626,675	\$594.72	
Total Tax Rate:		2.691200				
					Taxes w/Current Exemptions:	\$16,865.09
					Taxes w/o Exemptions:	\$16,865.08

**Improvement / Building**

No improvements exist for this property.

**Land**

#	Type	Description	Acres	Sqft	Eff Front	Eff Depth	Market Value	Prod. Value
1	LAND	Land	2.5020	108987.00	0.00	0.00	\$626,675	\$0

**Roll Value History**

Year	Improvements	Land Market	Ag Valuation	Appraised	HS Cap	Assessed
2014	N/A	N/A	N/A	N/A	N/A	N/A
2013	\$0	\$626,675	0	626,675	\$0	\$626,675
2012	\$9,518	\$261,569	0	271,087	\$0	\$271,087
2011	\$9,518	\$261,569	0	271,087	\$0	\$271,087
2010	\$9,518	\$435,948	0	445,466	\$0	\$445,466
2009	\$9,518	\$435,948	0	445,466	\$0	\$445,466

**Deed History - (Last 3 Deed Transactions)**

#	Deed Date	Type	Description	Grantor	Grantee	Volume	Page	Deed Number
1	1/1/2011							
2	8/30/2007	CD	CORRECTION DEED	BEN WHITE LAND L P	CSK PARTNERS LLC			2008086429TR
3	8/30/2007	SW	SPECIAL WARRANTY DEED	BEN WHITE LAND L P	CSK PARTNERS LLC			2007164924TR

**Questions Please Call (512) 834-9317**

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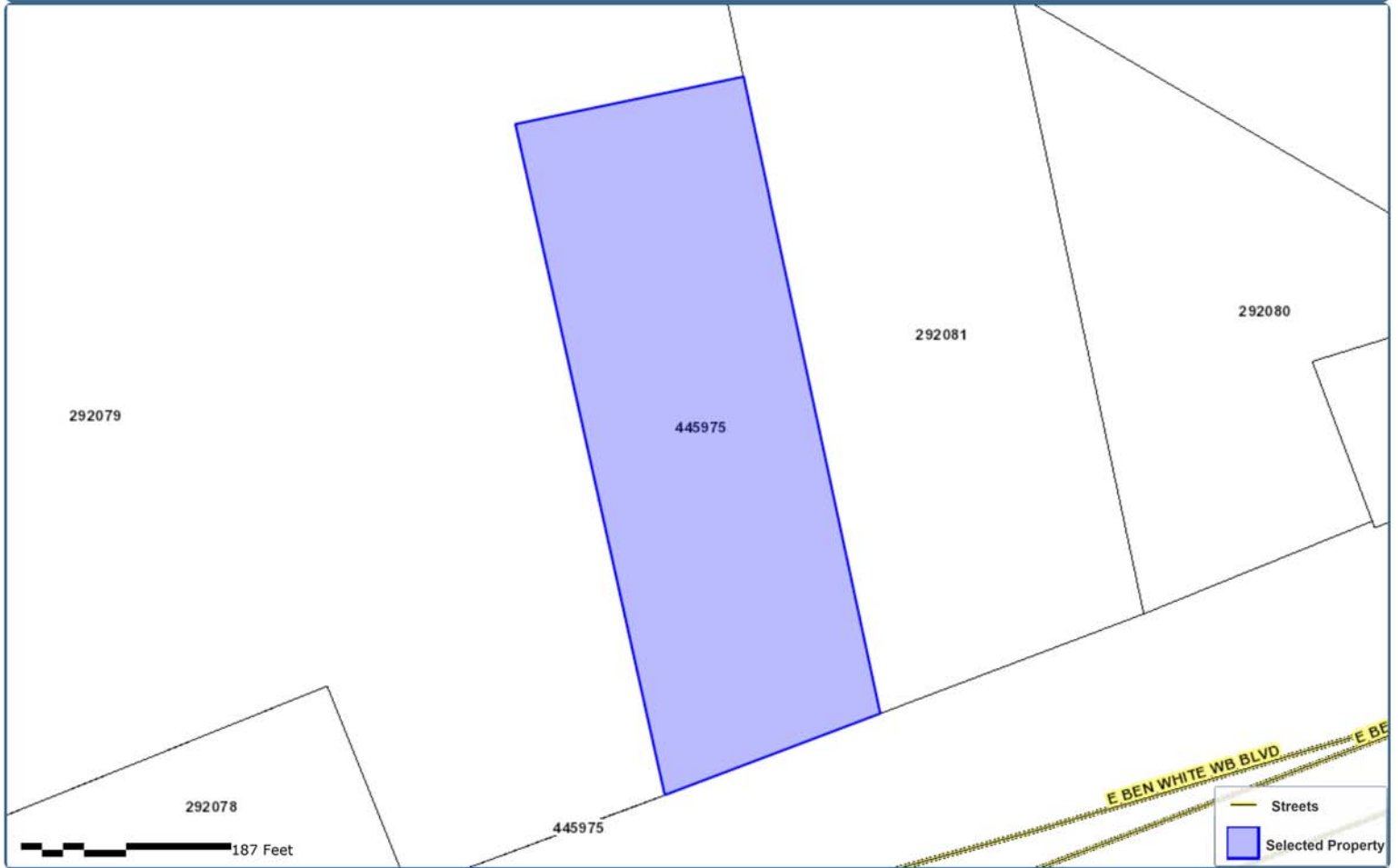
Website version: 1.2.2.3

Database last updated on: 1/17/2014 3:36 AM

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## Travis CAD - Map of Property ID 445975 for Year 2013



### Property Details

#### Account

Property ID: 445975  
Geo ID: 0315110217  
Type: Real

Legal Description: LOT 2 BLK A TRAVIS 51 ADDN NO 2

#### Location

Situs Address: 7016 E BEN WHITE BLVD AUSTIN, TX 78741  
Neighborhood: #71E  
Mapsc0: 646E  
Jurisdictions: 0A, 02, 03, 06, 2J, 68

#### Owner

Owner Name: CSK PARTNERS LLC  
Mailing Address: , 4320 INDUSTRIAL DR, , FORT SMITH, AR 72916-9194

#### Property

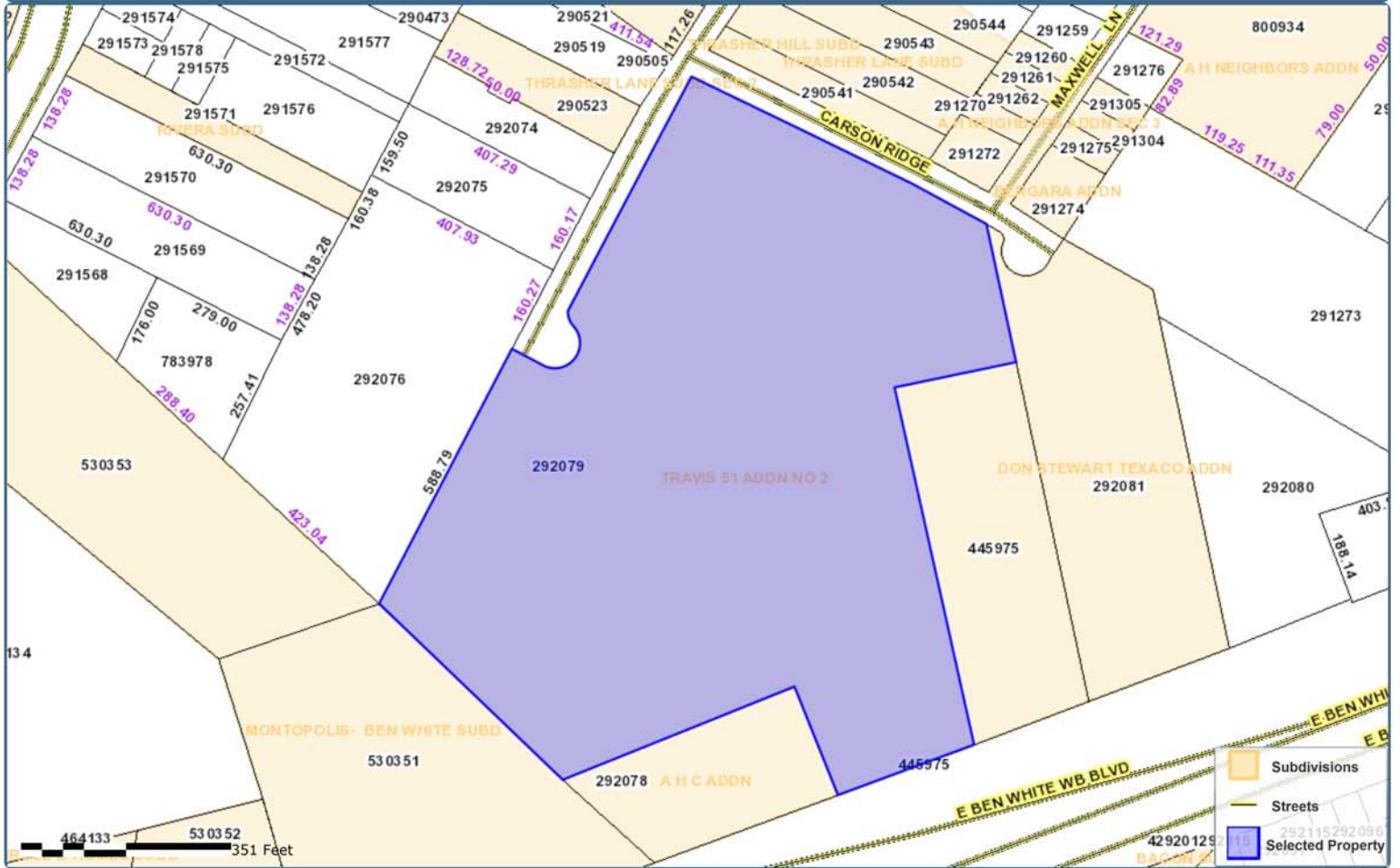
Appraised Value: N/A

<http://propaccess.traviscad.org/Map/View/Map/1/445975/2013>

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# Travis CAD - Map of Property ID 292079 for Year 2013



## Property Details

### Account

Property ID: 292079  
 Geo ID: 0315110209  
 Type: Real

Legal Description: LOT 1 BLK A TRAVIS 51 ADDN NO 2

### Location

Situs Address: 7000 E BEN WHITE BLVD TX 78741  
 Neighborhood: #71E  
 Mapsco: 646E  
 Jurisdictions: 0A, 01, 02, 03, 06, 2J, 68

### Owner

Owner Name: CSK PARTNERS LLC  
 Mailing Address: , 4320 INDUSTRIAL DR, , FORT SMITH, AR 72916-9194

### Property

Appraised Value: N/A

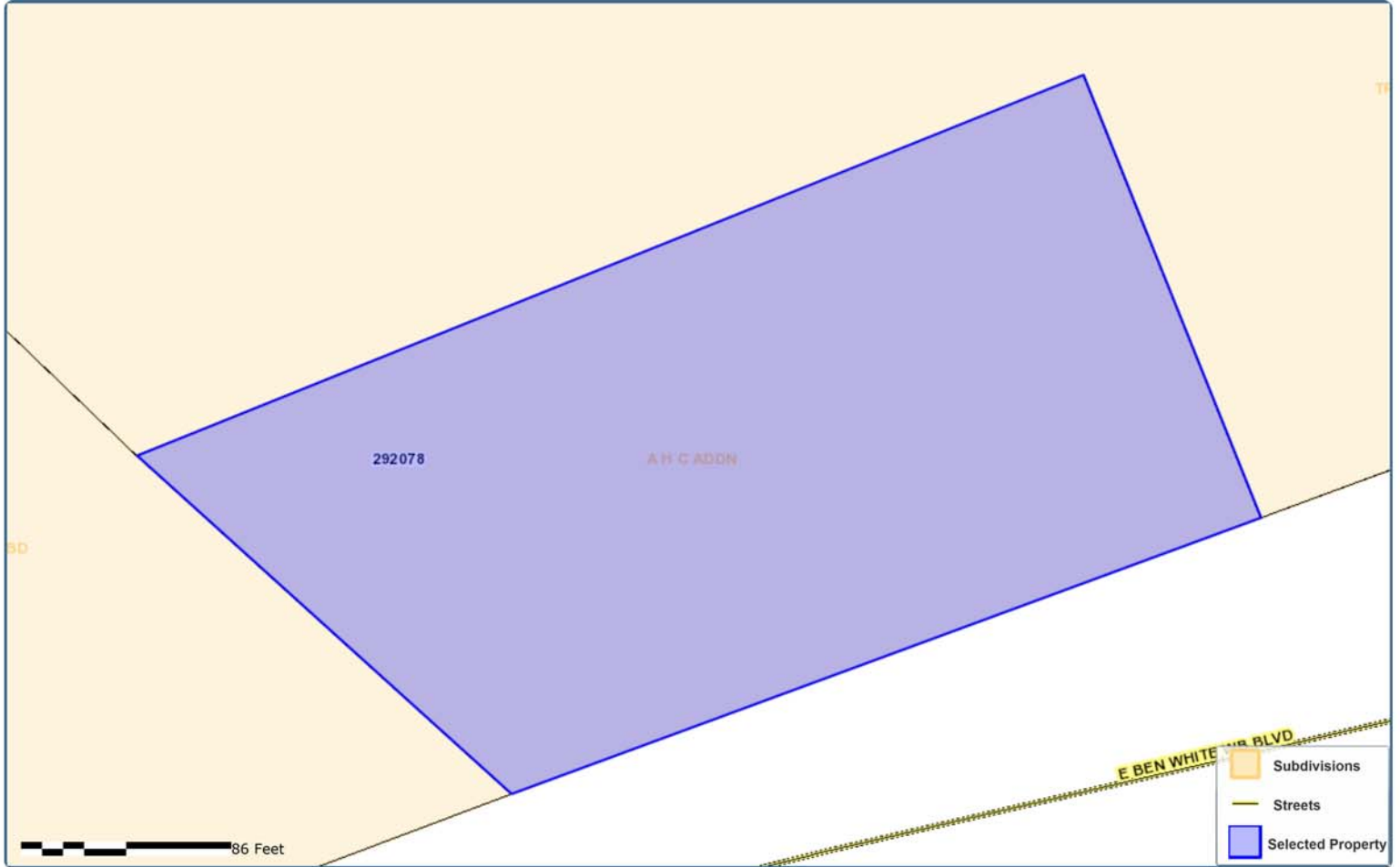
<http://propaccess.traviscad.org/Map/View/Map/1/292079/2013>

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## Travis CAD - Map of Property ID 292078 for Year 2013



### Property Details

#### Account

Property ID: 292078  
Geo ID: 0315110208  
Type: Real

Legal Description: 2.5020A OF LOT 1 A H C ADDN

#### Location

Situs Address: E BEN WHITE BLVD TX 78741  
Neighborhood: #71E  
Mapsc0: 646E  
Jurisdictions: 0A, 02, 03, 06, 2J, 68

#### Owner

Owner Name: CSK PARTNERS LLC  
Mailing Address: , 4320 INDUSTRIAL DR, , FORT SMITH, AR 72916-9194

#### Property

Appraised Value: N/A

<http://propaccess.traviscad.org/Map/View/Map/1/292078/2013>

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Map Disclaimer: This tax map was compiled solely for the use of TCAD. Areas depicted by these digital products are approximate, and are not necessarily accurate to mapping, surveying or engineering standards. Conclusions drawn from this information are the responsibility of the user. The TCAD makes no claims, promises or guarantees about the accuracy, completeness or adequacy of this information and expressly disclaims liability for any errors and omissions. The mapped data does not constitute a legal document.



# CITY OF AUSTIN - ZONING VERIFICATION LETTER

For questions concerning zoning compliance or any development criteria contact the Development Assistance Center of the City of Austin at (512) 974-6370.

This letter is to verify that the parcel listed is covered by the listed zoning classification on the date the letter was created.

## Party Requesting Verification

Name: Rochelle Gilbert  
Mailing Address:  
9054 Southernwood Way  
Indianapolis, IN 46231

## Tax Parcel Identification Number

Agency: TCAD  
Parcel ID: 0315110217

## Zoning Classification(s)

Find definitions at <http://www.austintexas.gov/page/zoning-districts>

CS-MU-NP

## Zoning Case Number(s)

Look up case info at [https://www.austintexas.gov/devreview/a\\_queryfolder\\_permits.jsp](https://www.austintexas.gov/devreview/a_queryfolder_permits.jsp)

C14-2011-0169

## Zoning Ordinance Number(s)

Look up ordinances at <http://austintexas.gov/edims/search.cfm>

20120405-085 & Amending Ordinance 20120607-015

For Address Verification visit:

<http://austintexas.gov/addressverification>

To access zoning ordinance documentation visit:

<http://austintexas.gov/edims/search.cfm>

To access zoning overlay documentation (Land Development Code Chapter 25-2 Division 6) visit:

<http://austintexas.gov/department/austin-city-code-land-development-code>

<http://austintexas.gov/department/zoning>

This letter was produced by the City of Austin Communication Technology Management Department on behalf of the Planning and Development Review Department.

I, Richard Sigmon, of the Communications and Technology Management Department for the City of Austin, do hereby certify that the above information reflects the data and records on file in this office.

12/3/2013

729214



# CITY OF AUSTIN - ZONING VERIFICATION LETTER

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Mailing Address:  
9054 Southernwood Way  
Indianapolis, IN 46231

## Tax Parcel Identification Number

Agency: TCAD  
Parcel ID: 0315110209

## Zoning Classification(s)

Find definitions at <http://www.austintexas.gov/page/zoning-districts>

CS-MU-NP

## Zoning Case Number(s)

Look up case info at [https://www.austintexas.gov/devreview/a\\_queryfolder\\_permits.jsp](https://www.austintexas.gov/devreview/a_queryfolder_permits.jsp)

C14-2011-0169

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<http://austintexas.gov/department/austin-city-code-land-development-code>

<http://austintexas.gov/department/zoning>

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12/3/2013

729215



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CS-MU-NP

## Zoning Case Number(s)

Look up case info at [https://www.austintexas.gov/devreview/a\\_queryfolder\\_permits.jsp](https://www.austintexas.gov/devreview/a_queryfolder_permits.jsp)

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<http://austintexas.gov/department/zoning>

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12/3/2013

729213



# City of Austin

P.O. Box 1088, Austin, TX 78767  
[www.cityofaustin.org/housing](http://www.cityofaustin.org/housing)

## Neighborhood Housing and Community Development Department

September 21, 2012

### S.M.A.R.T. Housing Certification

**Ben White Development, LP: 7000 East Ben White Blvd– The Point at Ben White (id #65351)**

TO WHOM IT MAY CONCERN:

Ben White Development, LP (development contact: Justin Hartz 502-638-0534 ext. 29; [jhartz@ldgdevelopment.com](mailto:jhartz@ldgdevelopment.com)) has submitted a S.M.A.R.T. Housing application for the construction of a **252 unit multi-family** development at **7000 East Ben White Blvd.** 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 (252 units) will serve households at or below 60% 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  
Building Permit  
Concrete Permit  
Electrical Permit  
Mechanical Permit  
Plumbing Permit

Site Plan Review  
Misc. Site Plan Fee  
Construction Inspection  
Subdivision Plan Review  
Misc. Subdivision Fee  
Zoning Verification

Land Status Determination  
Building Plan Review  
Parkland Dedication (*by separate ordinance*)

In addition, the development must:

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

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

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

Javier V. Delgado  
Neighborhood Housing and Community Development

Cc: Laurie Shaw, Capital Metro  
Maureen Meredith, PDRD  
M. Simmons-Smith, PDRD  
Kath. Murry, Austin Energy  
Robby McArthur, AWU

Bryan Bomer, AEGB  
Gina Copic, NIICD  
Chris Yanez, PARD  
Heidi Kasper, AEGB  
Danny McNabb, WPDR

Hillary Granda, PDRD  
Susan Kincl, NIICD  
Stephen Castleberry, PDRD  
George Zapalac, PDRD  
Debra Fonseca, PDRD



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

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Statements](#)[Board of Commissioners](#)[Awards and Accomplishments](#)**[Austin Affordable Housing  
Corporation](#)**[Contact Us](#)[Dggwlrqdc#qir](#)[Waiting Lists](#)[Landlord Information](#)[Press Room](#)[Community Resources](#)[Report Housing Fraud](#)[Southwest Housing](#)[Compliance Corporation](#)[Public Notices](#)[HACA Scholarship  
Foundation](#)[Dxwlrq#iirugdedh#k rxvlqj#F rusrudwlrq](#)

Austin Affordable Housing Corporation, AAHC, a non-profit subsidiary of HACA, ensures and preserves quality, affordable housing opportunities and continues to pursue entrepreneurial endeavors. AAHC oversees the following components:

[K rp hrz qhuvkls](#)

First-time homebuyers who are residents of the Public Housing or the Housing Choice Voucher Programs, have the opportunity to be awarded \$10,000 towards the down payment of a home. The [Homeownership Program](#) loan is given on a first-come, first-serve basis as funding for the program continues. Loan applicants must first be qualified for homeownership and contribute a minimum of \$2,500 towards the purchase of the home. The best part about the program is that the downpayment assistance loan is forgiven after five years if the homeowner is not in default.

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AAHC owns and operates one retail shopping center, Eastland Plaza. The shopping center is currently 100 percent occupied. The majority of the occupants renting a space at Eastland Plaza are large, publicly traded corporations. A few of the occupants include: Walgreens, Subway, Pizza Hut, Shoe Show and Citi-Trends. AAHC owns and operates five residential real-estate properties: Bent Tree Apartments, Sterling Village Apartments, Sweetwater Apartments, Leisure Time Village Apartments, and Park at Summers Grove.

[Vl{0vwdu#J hvlg hqw#Surjudp](#)

The [Six-Star Resident Program](#) is intended for those who are ready to move out of public housing, but have not met all the qualifications to purchase a home. Once the family is housed in the Six-Star Program, all public housing assistance is discontinued. The Six-Star Resident Program's participants have a choice to reside at one of AAHC's apartments homes at a lower rate than the fair market rental rate. The program must be completed within three years. The rent amount increases slightly every year until the fair market rental rate is reached.

[Hp hujlqj#Hqwhusulvhv](#)

Located in Eastland Plaza, Emerging Enterprises Business Development Resource Center is an innovative nucleus for entrepreneurs. The resource center was formed to meet the need of those who have the desire to start a business, and provide them with the means and skills to own and operate a successful business. Emerging Enterprises provides office space, materials, computers, and classes in business management.

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RONALD J. KOWAL



EDUCATION:

- 1979-83 Texas A&M University, College Station, Texas  
BBA in Management with extra course work in Finance and Accounting. Four-year Lettennan and two-year Team Captain in tennis.
- 1985 Real Estate License
- 1987 Real Estate Brokers License
- 1990 HUD and RTC Certified

WORK EXPERIENCE:

- 2003-Present THE HOUSING AUTHORITY CITY OF AUSTIN  
Vice-President of Housing Development/Asset Management responsible for the day to day management of multi-family and commercial assets including marketing, risk management, accounting, and merchandising of a portfolio of 1,000 multi-family and residential rental units as well as 150,000sf of office space and 88,000sf of retail space in addition to creation, implementation and management of financial literacy and homeownership opportunities for HACA's residents of Public Housing and Housing Choice Vouchers.
- 1995-2003 RE/MAX HEART OF TEXAS REALTORS  
Multi-million dollar producer specializing in residential and commercial real estate brokerage and tenant representation.
- 1987-95 PERION PROPERTY MANAGEMENT  
President/Owner of self-started property management company with a portfolio including commercial property, multi-family housing, single-family housing, and homeowner associations. Worked directly with investors in buying, selling and managing their properties, funds distribution, and rehabilitation projects. Operations included complete offering of property management services, including management of a strong support staff of on-site managers, maintenance personnel and contractors.
- 1987-89 LOCKE-SWEATMAN INVESTMENTS  
Operations Manager with duties including payroll, regulation of cash flow of all accounts, financial preparation and record-keeping of all operating accounts for C.P.A., and marketing of all properties including the design and presentation of marketing packages. Consulted by owners in the analysis of multi-family and commercial projects for future acquisition.
- 1984-89 AUSTIN COMMERCIAL VENTURES  
Coordinate management activities, including budgeting, accounting, decision-making, and overall responsibility for multi-family apartments, R V and mobile home parks and multi-use mini-storage facilities. Other tasks included the planning, pre-development, and management of five raw land tracts. Liaison between general contractor and managing partners in the complete development and construction finish-out of 382 unit mini-storage facility. Responsibilities included weekly reviews of the project and the handling and approval of construction draws with accountability to interim lender.

PERSONAL: Age: 50, Health: Excellent, non-smoker; married, three children

REFERENCES UPON REQUEST.





## **MICHAEL GREGORY GERBER**

President & CEO  
1124 S. IH 35  
Austin, TX 78704  
(512) 447.7788

[michaelgerber@hacanet.org](mailto:michaelgerber@hacanet.org)



### **PROFESSIONAL EXPERIENCE**

#### **HOUSING AUTHORITY OF THE CITY OF AUSTIN, Austin, Texas**

##### ***PRESIDENT & CEO, Sept. 2012 - present***

Responsible for the management operation and activities of the Housing Authority of the City of Austin, and two subsidiaries – Southwest Housing Compliance Corporation and Austin Affordable Housing Corporation. For 75 years, HACA has been a leader in providing safe, healthy, and affordable housing options in the Austin community. Each day, HACA serves more 19,000 people at 18 public housing properties and through the Housing Choice Voucher and other assisted housing programs. Through an array of community partnerships, HACA provides workforce, education, life skills and other self-sufficiency programs. For the past 13 years, HACA has been designated a “High Performer” through HUD’s Public Housing Assessment System (PHAS), as well as receiving a perfect 104 percent score through HUD’s Section Eight Management Assessment Program. Through our subsidiary, Southwest Housing Compliance Corporation, HACA serves as HUD’s Performance Based Contract Administrator for Project-Based Section 8 properties in Texas and Arkansas. SHCC currently has oversight responsibility for 859 Housing Assistance Payment contracts, representing 61,066 Project-Based Section 8 units throughout those states. Through Austin Affordable Housing Corporation, HACA has developed an inventory of nearly 1000 units of multifamily housing, serving the broader affordable housing needs of the community.

#### **STRATEGIC SOLUTIONS GROUP, Austin, Texas**

##### ***PRESIDENT, July 2011 – Sept. 2012***

The Strategic Solutions Group works with non-profit and community organizations in Texas and across the country to support and expand their ability to provide affordable housing and supportive services for low and moderate income persons.

#### **TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS, Austin, Texas**

##### ***EXECUTIVE DIRECTOR, May 2006- June 2011***

Responsible for the management, operations, and activities of the Texas Department of Housing and Community Affairs (TDHCA). TDHCA is the state agency focused on affordable housing, community services, energy assistance, colonia housing, disaster recovery housing and other federal and state programs. The Department administers over \$3 billion (including disaster recovery and federal American Recovery and Reinvestment Act funds) through for-profit, non-profit, and local government partnerships to deliver local housing and community-based opportunities and assistance to low income Texans.

As Executive Director, provided proactive leadership and strategic direction to 300+ staff in the administration of complex federal and state housing finance and community services programs, including homebuyer and homeownership assistance, single family and rental housing development, rental housing and home rehabilitation assistance, weatherization and utility assistance, colonia housing programs, disaster recovery housing assistance, poverty and homelessness prevention, and foreclosure relief.

#### **OFFICE OF TEXAS GOVERNOR RICK PERRY, Austin, Texas**

##### ***GOVERNOR'S ADVISOR (Office of Budget, Policy and Planning), September 2004- May 2006***

Advised the Governor on general government issues, including matters related to the Texas Department of Housing and Community Affairs, the Texas Workforce Commission, the Texas Building and Procurement Commission, and the One Star Foundation (Governor's Office on Faith and Community-based Initiatives). Responsible for monitoring, analyzing, and helping shape legislation, developing policy and budget proposals, meeting with external interest groups and evaluating agency performance.



**U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT, Washington, D.C.**  
***DIRECTOR OF LEGISLATIVE AND EXTERNAL AFFAIRS (Office of Public and Indian Housing)***  
**February 2003- September 2004**

As a political appointee of President George W. Bush, responsible for providing strategy and management advice to the Assistant Secretary for Public and Indian Housing to achieve the priorities of the Bush administration. The Office of Public and Indian Housing (PIH) oversees the administration of the nation's public housing, Housing Choice Voucher / Section 8 rental assistance, and Native American housing programs. The scope of PIH's authority comprised more than 60% of HUD's annual operating budget of approximately \$31 billion.

Specifically, responsible for advancing PIH's legislative priorities, including strategy development and execution, preparing testimony, and responding to Congressional inquiries and requests. Developed press and communication strategies for PIH priorities. As part of the senior leadership team, worked to manage and coordinate deputy assistant secretaries and division directors to advance and implement the administration's policy goals. Advised the Assistant Secretary and assumed a lead role in working to address issues faced by severely troubled housing authorities.

**BILL CHRISTIAN FOR CONGRESS**

***CAMPAIGN CONSULTANT, November 2002- February 2003***

Worked with the candidate to analyze issues and trends leading to the development of fundraising, media, and policy strategies.

**OFFICE OF U.S. CONGRESSWOMAN JUDY BIGGERT (R-Illinois), Washington, D.C.**

***LEGISLATIVE DIRECTOR, October 2001 - October 2002***

Provided management and oversight of Congresswoman Biggert's legislative activities, including policy analysis, research, and developing strategies to implement her legislative agenda. Managed legislative assistants and correspondents, drafted and analyzed bills and amendments, prepared testimony and floor speeches, and generated press opportunities. Managed all issues before the House Education and Workforce Committee, as well as appropriations, foreign policy, trade, and immigration issues.

**OFFICE OF U.S. SENATOR KAY BAILEY HUTCHISON (R-Texas), Washington, D.C.**

***LEGISLATIVE ASSISTANT, January 1997- October 2001***

Developed and implemented strategies to accomplish Senator Hutchison's legislative goals, drafted and analyzed legislation and amendments, prepared testimony and floor speeches, generated press opportunities and drafted press releases. Specifically, managed all policy and funding issues before four appropriations subcommittees (CommerceJustice-State, VA-HUD-Independent Agencies, Energy and Water Development, and Treasury-General Government) and accomplishing the Senator's objectives through the appropriations process. Also, responsible for energy policy, international trade, NASA/space science and technology, international narcotics/drug policy, immigration, and U.S.Mexico border issues.

**OFFICE OF U.S. SENATOR PHIL GRAMM (R-Texas), Washington, D.C.**

***SPECIAL ASSISTANT FOR STATE PROJECTS, July 1992- January 1997***

***DIRECTOR OF COALITIONS, July- September 1996, (Gramm '96 Campaign -Dallas, Texas)***

***LEGISLATIVE CORRESPONDENT, August 1990- July 1992***

## **EDUCATION**

### **MARYMOUNT UNIVERSITY, Arlington, Virginia**

Master of Business Administration (Concentration in Business Strategy and Marketing)

### **THE GEORGE WASHINGTON UNIVERSITY, Washington, D.C.**

Bachelor of Arts (Political Science)

## **OTHER ACTIVITIES**

### **TEXAS LYCEUM, Director, 2010- present**

The Texas Lyceum explores issues and works to develop the next generation of leaders in the State of Texas.

### **COVENANT HOUSE WASHINGTON, Board of Directors, 2001 - 2004**

Covenant House provides food, shelter, emergency assistance and support to at-risk, homeless and runaway youth in the Washington, DC area.

### **PRESIDENTIAL INAUGURAL COMMITTEE, Office of Public Liaison, January 2001**



### Narrative of LDG Development, LLC

LDG Development, LLC “LDG” has been developing rental housing, as well as affordable housing communities (with 9% housing credits and Tax Exempt Bonds w/ 4% credits) for over 15 years. Chris Dischinger and Mark Lechner formed LDG in 1994. From 1994 thru 2002 they started the company by acquiring/ developing / building and managing apartments and single-family homes. During this time LDG also acquired and managed some commercial real estate. In 2002 LDG saw an opportunity to enter the Housing Tax Credit program. Using this model as a springboard LDG has developed 4,732 units in Virginia, Indiana, Kentucky, Louisiana and Texas. LDG largest presence is in Texas with 2,277 units developed. Due to the large presence in Texas, a new office was opened in March 2013 in Austin, TX.

LDG has an excellent reputation in each of the communities it serves, as well as with the various State Housing Agencies. We strive to identify superior locations, develop high-quality housing and place qualified on-site 3<sup>rd</sup> party management.

We have also developed an internal Asset Management Program to monitor the key aspects of each of our developments, beginning with the construction phase through stabilization. After stabilization, the focus of our Asset Management Program is to monitor both the financial and operational performance of the development against agreed-upon benchmark and standards, as well as assure that all compliance reporting is completed timely and in accordance with IRS and State Housing Agency requirements.



# STUDIO A architecture

1371 Bardstown Rd, Louisville, KY 40204, T:502.589.8007, F:502.589.8004  
2525 Harrodsburg Road, Suite 105, Lexington, KY. 40504, T.859. 983.6760, www.studioaarch.com

## Who We Are/ Our Services

Studio A Architecture is a full service Architectural Firm with offices in Louisville, KY and Lexington, KY. Our Services include:

- Pre Design:
  - Site Evaluations
  - Site Layout Studies
  - Programming
  - Existing Facility Surveys
  - Client Representation
  - Contractor Selection
  - Sustainable Design Evaluation
- Schematic Design
- Construction Documents
- Bidding/ Negotiations
- Construction Administration
- Project Closeout Services
- Post Occupancy Survey



## Our Experience

Since first opening our doors ten years ago, we have been fortunate to have an opportunity to work on a wide variety of projects – from a small tenant fit-up to a \$25,000,000 multi-use center; complex medical or municipal facility. Our staff of 6 graduate architects has years of experience in planning and design of Retail, Office, Multi-Family, Hotel and Healthcare Facilities. Our recent projects include developments shown on this page as well as the following:

- Retail:
  - Westport Village Shopping Center, Louisville, KY
  - Shively Center Renovation, Louisville, KY
  - Liquor Barn Stores – Multiple Locations KY, IN,
  - Kroger Stores – Multiple Locations KY, TN, IN, IL
- Bank branches
  - US Bank – Multiple Locations - KY, TN, ND
  - First Capital Bank – Multiple Locations KY
- Multi-Family
  - Muses Apartment Complex, New Orleans, LA
  - Ashby Lane Apartment Homes, Louisville, KY
  - Ben White Apartments, Austin, TX
  - Colt's Run Apartments, Houston TX
  - Towne Place Mall, Elizabethtown, KY
  - Steeple Chase Apartments, Houston, TX
  - Front Gate Apartments, Louisville, KY
  - The Edge at Liberty Green, Louisville, KY
- Senior Housing
  - Brookstone , Louisville, KY
  - Floral Gardens, Houston, TX
  - Ben White, Senior Living, Austin, TX
- Assisted Living/ Memory Care
  - Hallmark House – Multiple Locations
  - Ashgrove Woods Assisted Living/ Memory Care, Nicholasville, KY
  - Robinbrooke Assisted Living/ Memory Care, Elizabethtown, KY
  - Trace Assisted Living/ Memory Care, Covington LA





**SPRINGHURST HEALTH AND REHAB ADDITION/ RENOVATIONS**  
**Proposal for Architectural Services**  
**3001 Hurstbourne Pkwy, Louisville, KY 40241**

**Hotels:**

Holiday Inn Express – Multiple Locations KY, IN  
Holiday Inn – Multiple Locations KY, IN  
Candlewood Suites – Multiple Locations KY, IN  
Four Points, Louisville, KY  
Home2Suites, Louisville, KY  
Hilton Garden Inn, Pikeville, KY  
Hampton Inn, Huntington, WV  
Fairfield Inn and Suites, Beckley, WV

**Office Buildings:**

Goldberg and Simpson Office Building, Louisville, KY  
Meridian Office Building, Louisville, KY  
ZirMed office building (interior fit-up), Louisville, KY  
Trinity Plaza, New Albany, IN  
Park Place, Clarksville, IN

**Dealerships:**

Oxmoor Toyota Dealership, Louisville, KY  
Mann Toyota Dealership, Prestonsburg, KY  
Hyundai of Louisville, Louisville, KY

**Medical:**

Norton Healthcare Campus at Shively Center, Louisville, KY  
Women First of Louisville/ Baptist Healthcare, Louisville, KY  
Imaging Centers – Multiple Locations

**Miscellaneous:**

Kosair Shriners Temple, Louisville, KY  
Louisville, Fire Station 21, Louisville, KY



**Licensing and Insurance**

Studio A Architecture is currently licensed and working in KY, IN, WV, OH, TN, IL, MO, LA, TX and carries \$3,000,000 professional liability insurance.

**Professional Membership**

AIA – American Institute of Architects  
NCARB - National Counsel of Architectural Registration Boards

**Environmentally Friendly Design**

Should the clients express a desire for the principles of Sustainable Architectural and Engineering design to be incorporated in the upcoming project, our team Member firms include LEED® Accredited Professionals to assist in design and future LEED® certification of the proposed Facility..

**Summary**

We pride ourselves on the long-term relationships we establish with our clients. We can be counted on to provide high quality professional service at all times. We look forward to the opportunity to work with you in the near future.

*Quality Design on Time and on Budget*



# CAPSTONE

## REAL ESTATE SERVICES, INC.

*"Our mission is to enhance our client's investments and create quality living and working environments."*

### PROFILE

Capstone Real Estate Services, Inc. is a full-service, third-party management firm presently managing approximately **33,000 multi-family units and 500,000 square feet of commercial space**. Founded in 1969, Capstone maintains 12 offices across 7 states and employs approximately 1,000 people in the field of property management, and our portfolio extends to over 95 cities. The size of our portfolio ranks us as the **10<sup>th</sup> largest** third-party management firm in the nation.

◆Austin ◆Abilene ◆Albuquerque ◆Brownsville ◆Corpus Christi ◆Dallas ◆El Paso ◆Miami ◆Houston ◆Laredo ◆Indianapolis ◆San Antonio

**Neither Capstone nor its principals owns, buys or sells investment real estate and we have no conflicts with our clients' interests in this regard.** This distinguishes us from many competing firms and enables us to provide the personalized service each property deserves, without the distraction that ownership can cause. Consequently, we focus on the client's goals beginning with take-over. **Third-party real estate management** is the business on which we have built our reputation, and we are committed to providing the highest standards of service and integrity to our clients.

### PROPERTY MANAGEMENT SERVICES

#### Pre-Acquisition Due Diligence Services

Interior Walk Through, Market Analysis, Operating Projections, Lease File Review, Exterior Observations

#### New Development Planning

Project Design Consulting, Marketing Consulting, Lease-up Specialists

#### Full Service Property Management

Traditional Multifamily Housing, Student Housing, Seniors Housing, Military Housing, Renovation Supervision, Manufactured Home Parks, Homeowners Associations, High/Mid Rises, Office, Retail

### NEW CONSTRUCTION

Capstone's apartment new construction management experience is extensive. The firm's new development background includes project design consulting, pre-construction planning, décor consulting, promotion and full lease-up for **125+ properties totaling over 28,000 units in 58 cities and 6 states since 1994**. Our objective is to reach full occupancy and maximize the bottom line in the shortest time possible in accordance with the owner's investment parameters. About **75% of our lease-ups have been completed in 9 months or less** and a full **51% have been completed in 6 months or less**.

### VALUE ADDED & REPOSITIONING EXPERIENCE

Real estate assets require periodic improvements, repairs, or in some cases, a complete re-positioning. Capstone understands this facet of investment ownership and has maintained a personnel base with the knowledge, expertise, and experience to assist our clients when such projects are contemplated. **Coordinating the rehab process with the management of the property is essential, and Capstone has perfected our role in this process to ensure operational goals are either met or exceeded.** We have a proven track record of successful repositionings that have continued to earn us praise from our clients, residents, and industry peers.

A large number of management contracts awarded to Capstone consist of older properties formerly challenged by their specific market or circumstance. Whether that challenge was due to poor management, deferred maintenance, or the desire to re-position, **Capstone was hired to make a difference.** In fact, in recent years Capstone managed properties have undergone comprehensive rehabs ranging from \$125,000 to over \$3 million. We are the recognized leader in this field.

### AFFORDABLE HOUSING

Capstone has significant experience with affordable housing units. Currently, Capstone manages affordable communities totaling over **17,000 units**, which ranks us as the **14th largest affordable housing** management company in the country. This includes the LIHTC Program, Tax Exempt Bond, Home Programs, Project-Based Section 8, the RTC/AHDP Affordable Housing Program, Military Rent-Restricted, etc. To better serve our clients, Capstone has a Compliance Department to effectively

monitor properties it manages with governmental reporting requirements. We understand the importance of being “in compliance” and the process that accompanies it.

## COMMERCIAL

Capstone’s Commercial Division manages approximately 500,000 square feet of space. Our experience includes every property type from office buildings, retail centers, industrial parks and warehouse facilities to downtown buildings, neighborhood centers and malls. Our comprehensive experience in commercial real estate and our commitment to building relationships with clients, tenants, and the brokerage community provides results for our clients’ investments.

## PROFESSIONAL PERSONNEL DEVELOPMENT

The key to quality client service is motivated and well-trained personnel. Our **training department** conducts extensive monthly seminars to each of our regional offices covering:

- ◆ Leasing & Marketing
- ◆ Risk Management
- ◆ Resident Retention
- ◆ Fair Housing
- ◆ Accounting Software
- ◆ Performance Evaluation

Our corporate-wide incentive program, “Accelerating Income Monthly” (AIM), rewards on-site staff for increasing the property’s economic occupancy. The program aligns on-site staff, District Manager and Owner objectives into one concise statement; increase property income and value.

## ACCREDITATIONS

Accredited Management Organization (AMO®), Institute of Real Estate Management (IREM®)  
Certified Property Manager (CPM®), Certified Public Accountant (CPA), Accredited Resident Manager (ARM®)  
Certified Apartment Manager (CAM®), Certified Occupancy Specialist (COS®), Assisted Housing Professional (AHP)  
Tax Credit Specialist (TCS), Housing Credit Certified Professional (HCCP®), National Compliance Professional (NCP)  
Certified Professional of Occupancy (CPO), Continuing Certified Credit Compliance Professional (C4P)

## LEVERAGED EXPENSE CONTROL

Capstone’s National Accounts has saved our clients millions of dollars by leveraging our portfolio with the industry’s most recognized vendors. We have negotiated highly competitive contracts and volume discounts for the recurring top expenses a community has, such as property insurance, utilities, flooring, maintenance supplies, paint supplies, office supplies, among many more. Our auditing program recaptures expenses such as utility bill overages, residents’ electricity, and through a thorough waste management review. Our clients enjoy the assurance that routine operating expenses are closely monitored and significantly discounted through Capstone’s National Accounts.

- ◆ Volume Purchasing Program
- ◆ Negotiated Service Contracts Software
- ◆ Master Insurance Program
- ◆ Utility Management
- ◆ Operating Revenue Enhancement Programs

## EXECUTIVE OFFICERS

James W Berkey, *President*  
Hugh A. Cobb, *Chief Operating Officer*  
Matthew C. Lutz, *Executive Vice President*  
Grant Berkey, *Senior Vice President*  
Steven Roach, *Vice President*

Regional Vice Presidents: Joy Lamb, Jim Weissmiller, Sam Shannon, Janie Clinkscales, Clay Klatt, Deborah Wiatrek, Michael Hendricks

**Our experience works for you.**

## CONTACT INFORMATION

**Hugh A. Cobb, Chief Operating Officer**  
**[hugh.cobb@capstonemanagement.com](mailto:hugh.cobb@capstonemanagement.com)**

210 Barton Springs Road, Suite 300, Austin, Texas 78704  
(512) 646-6700 (512) 646-6798 fax  
[www.capstonemanagement.com](http://www.capstonemanagement.com)



ACCREDITED  
MANAGEMENT  
ORGANIZATION



CERTIFIED  
PROPERTY  
MANAGER®

# Theresa Ebner, CAPS CAM

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**PROFILE** A seasoned professional and effective leader with a proven ability to exceed expectations:

- ✓ Well rounded package with a skill set that has an unique blend of analytical, sales, financial and leadership skills.
- ✓ Solution oriented
- ✓ Motivator and Team Builder
- ✓ Ability to identify problem and turn around the situation
- ✓ Forward thinker with the ability to convey a clear understanding and achieve the goal

## EMPLOYMENT

2011 – Present

**Regional Asset Manager**

LDG Development

Newly created position to oversee the fee management companies for southern properties to ensure properties are maximizing financial returns and perform market research to set performance goals and guidelines to achieve underwriting requirements for the management companies. Current portfolio consists of 9 sites or 1,658 units and overseeing 3 regional managers with the fee management company. Initial goals were to convert 3 existing properties to permanent financing and ensure management companies complete the 4 new construction lease-up on schedule, budgets and ensure tax credit compliance.

### *Key Achievements*

- Converted site to permanent financing 1 property and other 2 are positioned to convert by mid-2012. Increased occupancy by 29% on 1 site with-in 6 months
- Implemented for the management companies a standard of expectation, reporting and deadlines. This increased cash collections by 6.8% on stabilized properties will pushing delinquency down. Goal is to close monthly at 2% delinquency and currently 3 properties have achieved goal.
- Created reporting that reflects key operations metrics.
- Collaborated with the accounting and development teams to ensure reporting deadlines are achieved on time error free.
- Currently developing reporting dashboard and establishing a call center for lease-up properties.

2005 – 2011

**Regional Property Manager**

Capstone Real Estate Service  
& AIMCO

Six years of regional property manager experiences that is both Conventional and Tax Credit. The portfolios' averaged 11 properties or 2,100 units with 66 employees and 16 direct reports. Have the ability to step in and adapt to the situation and turn the challenge around. Responsible for all aspect of the property's operations from the people, product, price and promotion while finding ways to streamline expense and optimizing income.

### *Key Achievements*

- Completed 6 new construction leases up in 5 years- Capstone
- Maximized Cash Flow through rent increase and concession reduction. AIMCO ended year 7% better than budget and Capstone stabilized properties an average of 9% better than budget.
- Found solutions for glitches during software implantation and how to use data the new software provided by collaborating with the training department and implementation team for company-wide solutions.
- Create and implemented for Austin Region a telephone techniques class. Shop scores increase by 6%- Capstone
- Capstone-given challenged portfolio to turn around and stabilize. Then would transition portfolio to different regional.

1999 – 2005

**Director of Sales and Marketing**

AIMCO

- Portfolio ranged from 12 properties or 2,900 to 58 properties or 7,100 units
- Developed and beta tested resident retention program; sections of program was implemented as a company standard.
- Identified and monitor occupancy trends, forecasts, and economic conditions that may impact community performance.
- Reduced marketing expenses in the San Antonio market by \$30k, while maintaining occupancy
- Developed, trained and ensured implementation of sales training



## **EDUCATION**

**St. Edward's University**, Austin TX- Bachelor of Business Administration, Major-Marketing

**Austin Apartment Association** - Certified Apartment Property Supervisor Designation

**Austin Apartment Association** - Certified Apartment Manager Designation

## Company: About the Firm

**Novogradac & Company LLP** is a national certified public accounting and consulting firm headquartered in San Francisco, Calif. with offices in metro Atlanta, Ga.; Detroit, Mich.; Kansas City, Mo.; St. Louis, Mo.; Seattle, Wash.; and Washington, D.C.; as well as in Austin, Texas; Dover, Columbus and Cleveland, Ohio; Boston, Mass.; Portland, Ore.; New York, N.Y.; and Long Beach, Calif. The firm maintains clients in a broad range of industries with a major emphasis in the real estate sector, providing publicly and privately held national and multinational enterprises with a full spectrum of audit, tax, valuation, trust and litigation support and general consulting services.

Novogradac & Company LLP offers cost-effective audit, tax and consulting services to a variety of industries and clients, including nonprofits, government agencies, development and construction companies, real estate investment companies and securities firms. Examples of general consulting services include preparation of financial forecasts, pro formas, business advisory consulting services, tax consulting and tax compliance assistance, risk management services, litigation trust fund services, cost segregation reports, defeasance transaction services and miscellaneous agreed-upon procedures reports. We take care to understand fully the nature of our clients' businesses and can provide tax and accounting advice as needed throughout the assignment.

The firm works extensively in the affordable housing, community development and renewable energy fields, providing tax, accounting, audit and valuation services to affordable housing developments. A snapshot of our services includes compiling financial forecasts used to support partnership agreements, preparing partnership returns and Schedules K-1 for investors and performing financial statement audits. We also prepare tax credit applications, perform final cost certification audits and perform carryover allocation (10 percent test) audits as they relate to various state housing agency and IRS requirements. In addition, we provide valuation services such as market studies, feasibility analysis and appraisal services for fair market rate and affordable housing developments.

The firm's energy practice includes work involving renewable energy tax credits, specifically the production tax credit for wind and the investment tax credit for solar, providing consulting, tax, accounting and auditing to renewable energy projects. We serve a variety of participants in the renewable energy industry, including developers, investors and installers, providing them with services such as compiling financial forecasts used to support partnership agreements, preparing partnership returns and Schedules K-1 for investors, and performing financial statement audits. We also perform final cost certification audits in connection with various investor requirements.

Novogradac & Company LLP is a proven leader in the New Markets Tax Credit (NMTC) program, a significant public and private partnership created to encourage investors to make investments in distressed communities and promote economic improvement through the development of successful businesses in these communities. We offer consulting and tax services for NMTC investors, for-profit and nonprofit developers, community development entities (CDEs), accountants, government agencies and others whose goal is to create successful strategies for the building and revitalization of thriving communities. Our tax and accounting professionals can help in deal-structuring, CDE certification applications, NMTC allocation applications, annual audit and tax services, creation of compliance programs, investor negotiations, structuring private letter ruling requests, creation of financial pro formas and investment due diligence.

The firm offers new and experienced historic rehabilitation tax credit developers a broad range of professional services to assist with the challenges within the historic tax credit (HTC) arena. Our HTC team is committed throughout the development and application process to developing and implementing innovative solutions to underlying tax, structuring, compliance and business issues encountered in complicated deals. We base our services on comprehensive knowledge of and broad experience with complex tax, accounting, business and transactional issues inherent in financing and developing HTC rehabilitation projects. Our work in the HTC industry includes various services in connection with the investment tax credit under IRC section 47 and state HTC programs including transaction, tax and compliance consulting; accounting services; and investor services and consulting.

The firm has consulted for 23 years on thousands of real estate projects and maintains client relationships with the leading affordable housing sponsors in the industry. Our value-added services and solutions are based on innovative thinking and effective implementation and are the foundation on which we have developed the critical resources necessary to provide outstanding professional services. We are dedicated to meeting client needs in a thorough, efficient and creative manner.

Novogradac & Company partners have published numerous affordable housing industry related articles in national newspapers and highly regarded trade journals. They are the authors of the Low-Income Housing Tax Credit Handbook, the nation's leading authoritative guide to affordable housing development; they also write and publish the Tax-Exempt Bond Handbook: A Tax Credit Practitioners Guide to Using Tax-Exempt Bonds for Low-Income Housing Tax Credit Projects; LIHTC Property Management book; New Markets Tax Credit Handbook; Historic Rehabilitation Handbook; and Renewable Energy Tax Credit Handbook, as well as other comprehensive tax credit finance reference books. The firm also publishes the Novogradac Journal of Tax Credits, a full color, monthly publication offering news, features and commentary on the low-income housing tax credit (LIHTC), LIHTC

compliance, valuation and tax-exempt bond housing industries as well as coverage of new markets, renewable energy and HTC and HUD programs. Our professionals also keep our clients and other industry practitioners up to date on the latest news, issues and trends in these industries through weekly podcasts and breaking news alerts. Clients and friends are encouraged to follow us on Twitter and the Novogradac blog.

Novogradac & Company LLP sponsors affordable housing, renewable energy and real estate-related conferences coast to coast. These conferences attract hundreds of the industry's leading experts and participants nationwide. We also conduct workshops and webinars on a variety of affordable housing, new markets and renewable energy related topics. Because of their industry expertise, our professionals are invited regularly to speak at seminars and conferences throughout the country. Many are former associates of international accounting and appraisal firms.

Novogradac & Company LLP is ranked by *Accounting Today* and *Inside Public Accounting* as one of the top 50 accounting firms in the nation.



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#### Industries & Practices

#### Testimonials

"The attorneys at Coats Rose possess a unique understanding of complex construction law combined with rare deep understanding of how commercial construction goes together in the real world. Those skills taken in combination have deftly served Dyad to avoid many common pitfalls of our competitors."

**- Rick Trask Owner Dyad Construction, L.P**

"Coats Rose attorneys have always handled our account as if we were their only client; and their wisdom, candor and availability makes the Coats Rose team our first choice when legal matters arise."

**- Gregory Smith, PE Executive Vice President, Partner Jamail & Smith Construction**

"Coats Rose and I have worked together on many matters, and they have always been very thorough, efficient and readily available to provide legal services... I appreciate the expertise Coats Rose provides in construction and

business related matters, and their ability to provide and convey that knowledge quickly and efficiently."

**- Donald R. Boehm**

"Thank you (Timothy Green, Director, Public Finance Law) for all your hard work to help us bring together two municipalities that were long overdue in becoming one. We are blessed as a commUNITY to embark on a "new journey" as one political subdivision serving its citizens and business owners." **-Carrie F. Gordon, Ph.D.**

**Mayor of Balch Springs, TX**

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# Affordable Housing Law

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The firm's Affordable Housing Group showcases our attorneys' extensive experience in affordable and public housing acquisition, rehabilitation and development. In fact, Coats Rose has one of the largest groups of lawyers dedicated to affordable housing in the state of Texas as well as throughout the Southwest region, representing both for-profit and non-profit developers.

We also represent public housing authorities in the development, redevelopment and renovation of housing. Our attorneys have closed transactions using a variety of financing techniques, including HOPE VI financing, low income housing tax credits, private activity tax-exempt bonds, 501(c)(3) tax-exempt bonds, investment syndications and conventional financing.

We've enjoyed particular success with specialized financing through low income housing tax credits and tax exempt municipal bonds.

Our work on high profile, potentially controversial projects has made us a leader in identifying responsive, creative solutions to problems which may arise in the transaction.

### Areas of Practice:

- Low Income Housing Tax Credits
- Tax Exempt Financing
- HUD Insured Multifamily Financing
- Public Housing Development (including HOPE VI, Capital Funds & Replacement Housing Factor Funds)
- Public/Private Partnerships with Housing Authorities and For Profit Developers
- HUD 202 and 811 Financing
- HUD Regulatory Compliance
- HOME and CDBG
- Community Housing Development Organizations – CHDO
- Tax Increment Reinvestment Zones
- Tax Abatements
- Governmental and Community Relations
- New Market Tax Credits
- Historic Tax Credits

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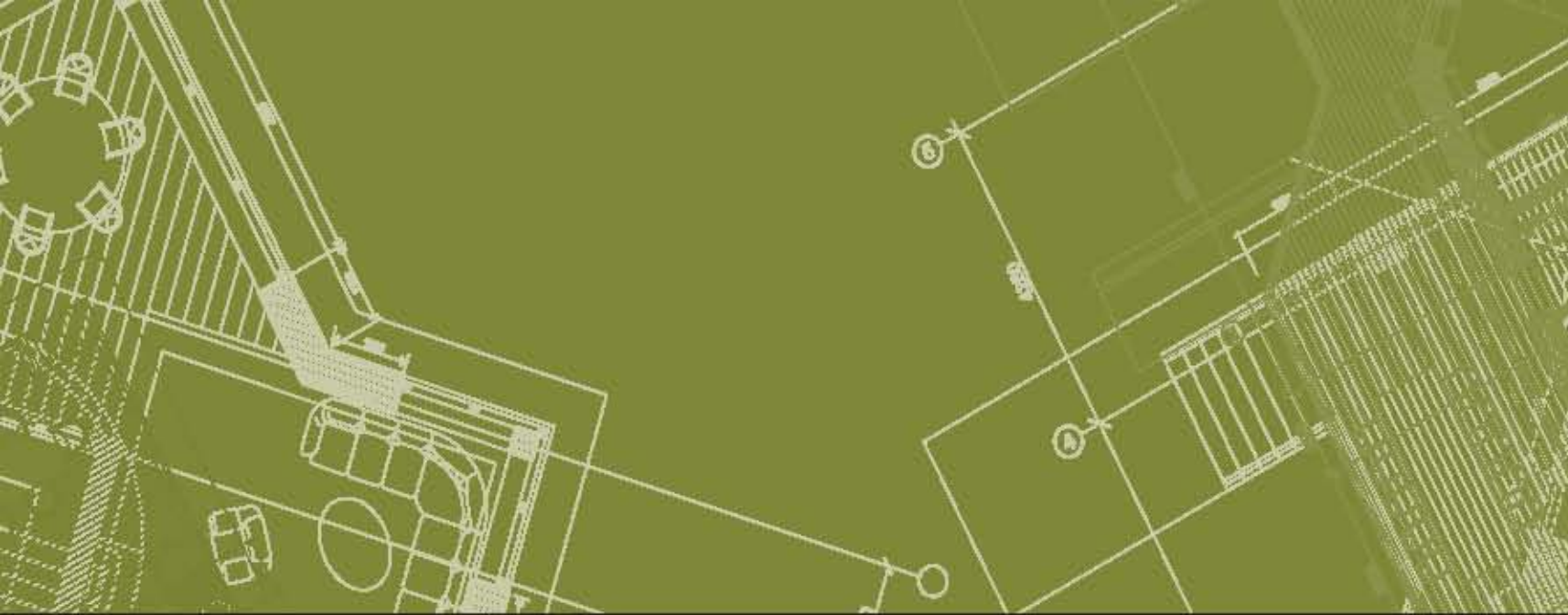


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## VISION

LDG Development's sole purpose is providing homes to families because

*"Everyone Deserves a Quality Place to Live."*

Founded in Louisville, Kentucky, the mission begins with looking at every project as a long-term real estate deal. LDG believes that homes built with superior, sustainable products will yield a far greater return. Simply put, investing up front is money well spent.





# INTEGRITY

LDG takes a time-honored approach with quality construction leveraged

by researched cost efficiency.

The company utilizes attractive architecture and design ensuring their buildings shine within the communities in which they are built. Nothing is substandard.

Environmentally-friendly construction methods using green technology provide long lasting return and secures an extraordinary investment.







# COMMUNITY

Establishing a warm, inviting and flourishing neighborhood is paramount. Communities are designed to encourage a family atmosphere with outdoor activities and stylish interior homes. This is a place where new friends are made and families can grow and mature.

LDG maintains its assets and commits to the journey alongside the residents.

More than a set of buildings, this is a rich and diverse blend of people.

It is a privilege to cultivate a foundation of life.







## INNOVATION

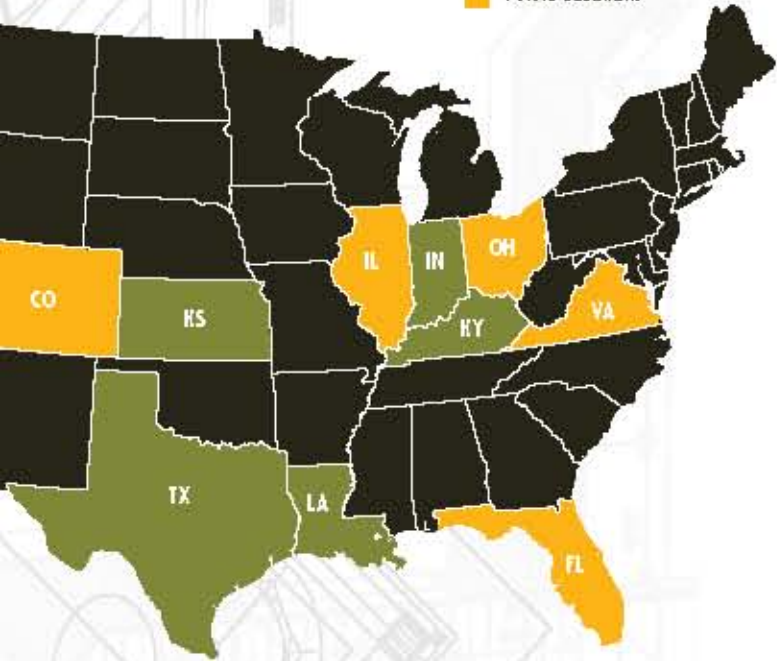
LDG communities stand alone with affordable upscale housing. Many include features and details not available in competitor properties. Residents may enjoy a full cinema, splash park, Wi-Fi Hotspots, indoor game center, limited access gates, business center, play parks and planned social events. Lush landscaped grounds compliment dramatic structures. In many cases, community programs are offered for convenience, such as tax preparation assistance and after-school socials.



# COVERAGE

Currently, LDG owns, operates and constructs communities throughout the Midwest, Central and Southwest with plans to expand into other regions. Wherever the need for quality affordable housing, LDG Development is able to utilize vast resources to accomplish housing throughout most of the United States.

■ Existing/Developing Areas  
■ Future Locations



HARRIS BRANCH Austin, TX



INWOOD CROSSING, Wichita, KS



SANTORA VILLAS Austin, TX



THE WOODS OF CRESCENT HILL Louisville, KY



GLENEAGLES Lexington, KY



THE MUSES New Orleans, LA





T·H·E  
**MUSES**  
APARTMENT HOMES

NEW ORLEANS, LA

This state-of-the-art housing complex is a beautiful gated community with highly prized urban amenities. The Muses has been nationally recognized for their award-winning environmental standards using cool-roof technology and no-VOC paints and sealants. LDG is proud of The Muses which bridges the city's historic corridors – St. Charles Avenue and the Oretha Castle Haley Boulevard.







# OVERLOOK TERRACES

LOUISVILLE, KY

This multi-family development offers affordable living with a million dollar view. Nestled in the Candlelight neighborhood of South Louisville above the Jefferson Memorial Forest, Overlook Terraces features the first-ever splash park at an apartment complex in Louisville, Kentucky.





# HARRIS BRANCH

★  
Apartments

AUSTIN, TX

Harris Branch Apartments provides an easy commute to scenic downtown Austin, Texas. The city's energy green building program awarded Harris Branch with achievement in sustainable design and construction for providing greater resource efficiency.







# WHISPERING WOODS

LOUISVILLE, KY

It's rare to ever find vacancy at this particular LDG property. Families flock to Whispering Woods for their oversized playground and community garden. Whispering Woods plays a major role in revitalizing this Louisville, Kentucky neighborhood.







**MELBOURNE  
SENIOR**  
APARTMENTS

ALVIN, TX

LDG's latest endeavor includes providing homes to active seniors over the age of fifty-five. Melbourne Senior is located southeast of Houston, in Alvin, Texas. This gorgeous property is resortlike with its lake, gazebo, outdoor pool, business center, fitness area and their very own hair salon. Living at Melbourne resembles a constant vacation.







### *Diverse Management Team*

Chris Dischinger and Mark Lechner cofounded LDG development in 1994 with the simple plan to build a real estate company with integrity. In the beginning, the renovation and building of small residential properties seemed to define the company. Along the way, the two principals discovered a need for quality affordable housing within several markets. They gathered a team of experts to help facilitate the need for outstanding residential; with quality construction and affordable living as their foundation. The company has grown into one of the nation's largest affordable housing developers and has established more than developed 4,000 properties throughout the country.

### *Asset Management*

LDG'S asset management specialists are a unique part of the team. They closely monitor the entire portfolio of properties. This includes weekly reports with the management companies allowing LDG to identify challenges and opportunities. It's a dynamic system that aids with leasing up vacant units and feeding the overall life cycle of each property.

### *Accounting and Tax*

The LDG accounting group is led by a 25 year CPA with an extensive background in auditing, tax, and financial planning. Focusing primarily on tracking projects under development, coordinating cost certification audits and efficiently overseeing more than 25 partnerships. Tax planning and strategy is considered in all aspects of the business from initial portfolio acquisition to development, financing asset operations and sales

### *Development Team*

This department provides both development and construction services through a specialized team with extensive experience in multi-family real estate. LDG Development offers project management and consulting services. Additionally, this group works closely with the asset management team in order to conduct strategic market analysis, economic analysis and value engineering project to increase investment returns.

### *Public Relations Department*

The public relations department works closely with the development of each property and assists with ground-breaking, grand opening ceremonies and all media sources for property promotion efforts. These events and on-going involvement increase the property's lease-up process, transition a development into an established neighborhood and prove to be a very successful marketing strategy in any community.



## EXPERTISE

### *Diverse Management Team*

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# STRENGTH

Since 1994, D&D Development has worked closely with nearly a dozen state housing corporations to navigate and maximize the opportunities of affordable housing projects

## QUALITY LIVING COMES HOME

### Growing Services Include:

- The development of independent senior living housing communities
- Expanding pipeline in our development region
- Continued attention to any challenges that may arise with swift action and positive solutions
- Ongoing sustainability and compliance with historic preservation districts

This team of professionals provides a constant synergy throughout the entire development process. Their expertise remains as the property matures, establishing a successful and prosperous community. The future is promising as America's need for quality housing continues.





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QUALITY LIVING COMES HOME



**LDG DEVELOPMENT EXPERIENCE**

Property Name / Location	Property Type (LIHTC, Market, etc.)	Year Built / Constr. Started	# Units or SqFt	% Complete	State Housing Authority Project #	HOME/CDBG/OTHER Funding	Total Development Costs	Investor	Tax Credit Price
Cooper Chapel Condominiums Louisville, KY	Market Condominium	2004	56	100	N/A	N/A	\$4,200,000	N/A	N/A
Falcon Crest Patio Homes Louisville, KY	Market Patio Homes	2005	78	100	N/A	N/A	\$4,500,000	N/A	N/A
Elkhorn Creek Phase I Georgetown, KY	LIHTC	2005	44	100	KY-03-058	N/A	\$4,800,000	MMA Financial, LLC	\$0.89
Falcon Crest Apartments Louisville, KY	Tax Exempt Bonds	2005	208	100	KY-06-104	N/A	\$12,500,000	MMA Financial, LLC	\$0.83
Elkhorn Creek Phase II Georgetown, KY	LIHTC	2006	48	100	KY-04-501	N/A	\$2,750,000	MMA Financial, LLC	\$0.89
Elk River Senior Apartments Georgetown, KY	LIHTC	2006	40	100	KY-04-006	N/A	\$4,900,000	MMA Financial, LLC	\$0.89
Whispering Woods Louisville, KY	LIHTC	2006	48	100	KY-05-020	1,649,846	\$5,100,000	MMA Financial, LLC	\$0.92
Cambridge Station Indianapolis, IN	Tax Exempt Bonds	2006	200	100	IN-04-00100	N/A	\$12,700,000	MMA Financial, LLC	\$0.83
Cambridge Station Phase II Indianapolis, IN	Tax Exempt Bonds	2007	256	100	IN-05-02700	N/A	\$17,200,000	MMA Financial, LLC	\$0.83
Gleneagles Apartments, Ltd Lexington, Ky	Tax Exempt Bonds	2007	184	100	KY-06-105	N/A	\$17,500,000	MMA Financial, LLC	\$0.82
Harris Branch Apartments Austin, Tx	Tax Exempt Bonds	2007	248	100	TX-05-62401	N/A	\$25,300,000	MMA Financial, LLC	\$0.98
Park Place at Loyola Austin, Tx	Tax Exempt Bonds	2007	252	100	TX-07-60101	N/A	\$26,500,000	MMA Financial, LLC	\$0.97
Santora Villas Austin, Tx	Tax Exempt Bonds	2007	192	100	TX-07-60601	N/A	\$23,030,000	MMA Financial, LLC	\$0.97
The Villas at Shaver Pasadena, TX	Tax Exempt Bonds	2007	240	100	TX-07-43501	N/A	\$27,600,000	MMA Financial, LLC	\$0.96
Inwood Crossings Wichita, KS	Tax Exempt Bonds	2007	260	100	07 - INWOOD	N/A	\$33,700,000	MMA Financial, LLC	\$0.72
Overlook Terraces Louisville, KY	Tax Exempt Bonds	2008	144	100	KY-09-102	1,475,000	\$27,900,000	MMA Financial, LLC	\$0.86
Whispering Woods Phase II Louisville, KY	LIHTC	2008	50	100	KY-08-023	N/A	\$6,300,000	MMA Financial, LLC	\$0.90
The Muses, LTD. New Orleans, LA	LIHTC	2009	211	100	07/08(FA)-08	\$2,000,000 HOME \$25,741,662 CDBG 2nd Mortgage	\$49,000,000	Stratford Capital Group	\$0.65
The Muses II, LTD. New Orleans, LA	Tax Exempt Bonds	2010	52	100	06-68BF	\$7,410,284 CDBG 850,000 TCAP	\$11,100,000	Stratford Capital Group	\$0.80
Melbourne Senior Alvin, TX	LIHTC	2010	110	100	TX-09907	N/A	\$16,100,000	TCEP	\$0.85
Floral Gardens Houston, TX	LIHTC	2010	100	100	TX-09978	\$726,000 HOME LOAN	\$14,300,000	TCEP	\$0.85
Towne Mall Commons Elizabethtown, KY	LIHTC	2010	94	100	KY-10-003	\$600,000 Monetized 1602 EX	\$12,300,000	Stratford Capital Group	\$0.70
Steeple Chase Farms Sherman, TX	LIHTC	2010	156	100	TX-10079	N/A	\$19,400,000	Stratford Capital Group	\$0.78
Cypress Gardens Houston, TX	LIHTC	2011	100	100	TX-10064	N/A	\$13,900,000	RBC Capital Markets	\$0.82
Woodcrest Baton Rouge, LA	Tax Exempt Bonds	2011	48	100	IG-2010-10	\$1,500,000 TCAP; \$2,250,000 CDBG / Gustav; \$799,000 HOME	\$7,300,000	Stratford Capital Group	\$0.85
Mallard Crossing Baton Rouge, LA	Tax Exempt Bonds	2011	192	100	IG-2010-10	\$1,500,000 TCAP; \$4,350,000 CDBG / Gustav; \$1,838,000 HOME	\$24,500,000	Stratford Capital Group	\$0.65
Village Du Lac Lafayette, LA	LIHTC	2012	140	100	TBD	N/A	\$9,170,000	CITI Real Estate Investors	N/A
Brookcreek Crossing Richmond, VA	LIHTC	2012	70	70%	TBD	N/A	\$10,670,000	Regions	\$1.03
The Paddock at Norwood Austin, TX	LIHTC	2013	228	15%	TBD	Tax Exemption	\$32,350,000	1st Sterling	\$0.96
Villas at Colt Run Houston, TX	LIHTC	2013	138	10%	TBD	3,000,000 HOME LOAN	\$18,350,000	1st Sterling	\$0.93
Newport Village Crosby, TX	LIHTC	2014	80	Closing	TBD	N/A	\$12,300,000.00	TBD	\$0.98
The Pointe at Ben White Austin, TX	LIHTC	2014	250	Closing	TBD	N/A	\$35,580,000.00	TBD	\$1.00
Villages of Ben White Austin, TX	LIHTC	2014	183	Closing	TBD	N/A	\$25,353,000.00	TBD	\$0.96
Frontgate Louisville, KY	LIHTC	2014	32	Closing	TBD	N/A	\$5,300,000.00	TBD	\$0.89
<b>TOTAL</b>			<b>4,732</b>				<b>\$573,453,000</b>		



15 YEAR PRO FORMA

Villages of Ben White (Senior) AUSTIN, TX Tax Exempt Bond Transaction

15 YEAR PRO FORMA

# OF UNITS	183	15 YEAR PRO FORMA																				183
OCCUPANCY		93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	93%	
%	93%	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10	YEAR 11	YEAR 12	YEAR 13	YEAR 14	YEAR 15	YEAR 16	YEAR 17	YEAR 18	YEAR 19	YEAR 20	
RENTAL INCOME	2.00% ANNUAL INCREASE	1,865,604	1,902,916	1,940,974	1,979,794	2,019,390	2,059,778	2,100,973	2,142,993	2,185,852	2,229,569	2,274,161	2,319,644	2,366,037	2,413,358	2,461,625	2,510,857	2,561,075	2,612,296	2,664,542	2,717,833	
VACANCY		(139,920)	(142,719)	(145,573)	(148,485)	(151,454)	(154,483)	(157,573)	(160,724)	(163,939)	(167,218)	(170,562)	(173,973)	(177,453)	(181,002)	(184,622)	(188,314)	(192,081)	(195,922)	(199,841)	(203,837)	
OTHER INCOME	2.00% ANNUAL INCREASE	79,320	80,906	82,525	84,175	85,859	87,576	89,327	91,114	92,936	94,795	96,691	98,624	100,597	102,609	104,661	106,754	108,889	111,067	113,288	115,554	
EGI		1,805,004	1,841,104	1,877,926	1,915,484	1,953,794	1,992,870	2,032,727	2,073,382	2,114,850	2,157,147	2,200,289	2,244,295	2,289,181	2,334,965	2,381,664	2,429,297	2,477,883	2,527,441	2,577,990	2,629,550	
PAYROLL	3.00% ANNUAL INCREASE	190,137	195,841	201,716	207,768	214,001	220,421	227,034	233,845	240,860	248,086	255,528	263,194	271,090	279,223	287,599	296,227	305,114	314,267	323,696	333,406	
ADMINISTRATION	3.00% ANNUAL INCREASE	37,515	38,640	39,800	40,994	42,223	43,490	44,795	46,139	47,523	48,949	50,417	51,930	53,487	55,092	56,745	58,447	60,201	62,007	63,867	65,783	
MANAGEMENT	3.5% FIXED %	63,175	64,439	65,727	67,042	68,383	69,750	71,145	72,568	74,020	75,500	77,010	78,550	80,121	81,724	83,358	85,025	86,726	88,460	90,230	92,034	
REPAIR & MAINT.	3.00% ANNUAL INCREASE	106,323	109,513	112,798	116,182	119,667	123,257	126,955	130,764	134,687	138,727	142,889	147,176	151,591	156,139	160,823	165,648	170,617	175,736	181,008	186,438	
UTILITIES	3.00% ANNUAL INCREASE	128,100	131,943	135,901	139,978	144,178	148,503	152,958	157,547	162,273	167,141	172,156	177,320	182,640	188,119	193,763	199,576	205,563	211,730	218,082	224,624	
MKTG & RETENTION	3.00% ANNUAL INCREASE	8,235	8,482	8,737	8,999	9,269	9,547	9,833	10,128	10,432	10,745	11,067	11,399	11,741	12,093	12,456	12,830	13,215	13,611	14,020	14,440	
R/E TAXES	3.00% ANNUAL INCREASE	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
INSURANCE	3.00% ANNUAL INCREASE	73,200	75,396	77,658	79,988	82,387	84,859	87,405	90,027	92,728	95,509	98,375	101,326	104,366	107,497	110,722	114,043	117,465	120,988	124,618	128,357	
OTHER:Supportive Serv	3.00% ANNUAL INCREASE	7,320	7,540	7,766	7,999	8,239	8,486	8,740	9,003	9,273	9,551	9,837	10,133	10,437	10,750	11,072	11,404	11,746	12,099	12,462	12,836	
OTHER:Security	3.00% ANNUAL INCREASE	10,980	11,309	11,649	11,998	12,358	12,729	13,111	13,504	13,909	14,326	14,756	15,199	15,655	16,125	16,608	17,106	17,620	18,148	18,693	19,253	
OTHER:TDHCA Complia	3.00% ANNUAL INCREASE	7,320	7,540	7,766	7,999	8,239	8,486	8,740	9,003	9,273	9,551	9,837	10,133	10,437	10,750	11,072	11,404	11,746	12,099	12,462	12,836	
OTHER:	3.00% ANNUAL INCREASE	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
TOTAL EXPENSES		632,305	650,643	669,517	688,946	708,944	729,528	750,716	772,526	794,977	818,086	841,873	866,359	891,565	917,510	944,218	971,711	1,000,012	1,029,146	1,059,135	1,090,007	
EXPENSES PER UNIT	\$3,455	35.0%	35.3%	35.7%	36.0%	36.3%	36.6%	36.9%	37.3%	37.6%	37.9%	38.3%	38.6%	38.9%	39.3%	39.6%	40.0%	40.4%	40.7%	41.1%	41.5%	
RES. FOR REPL	0%	\$250	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	45,750	
TOTAL EXPENSES		678,055	696,393	715,267	734,696	754,694	775,278	796,466	818,276	840,727	863,836	887,623	912,109	937,315	963,260	989,968	1,017,461	1,045,762	1,074,896	1,104,885	1,135,757	
NOI	\$3,705	1,126,949	1,144,711	1,162,658	1,180,789	1,199,100	1,217,592	1,236,261	1,255,105	1,274,123	1,293,311	1,312,666	1,332,186	1,351,866	1,371,704	1,391,696	1,411,836	1,432,121	1,452,545	1,473,104	1,493,792	
DEBT SERVICE	0	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	979,785	
CASH FLOW		147,164	164,926	182,874	201,004	219,316	237,807	256,476	275,321	294,338	313,526	332,881	352,401	372,082	391,920	411,911	432,051	452,336	472,760	493,320	6,004,412	
Cashflow per Year		147,164	164,926	182,874	201,004	219,316	237,807	256,476	275,321	294,338	313,526	332,881	352,401	372,082	391,920	411,911	432,051	452,336	472,760	493,320	6,004,412	
Cumulative Cashflow		147,164	312,090	494,964	695,967	915,283	1,153,090	1,409,566	1,684,886	1,979,224	2,292,750	2,625,632	2,978,033	3,350,114	3,742,034	4,153,945	4,585,996	5,038,332	5,511,092	6,004,412	12,008,823	
CASH FLOW/UNIT		804	901	999	1,098	1,198	1,299	1,402	1,504	1,608	1,713	1,819	1,926	2,033	2,142	2,251	2,361	2,472	2,583	2,696		
DSC RATIO		1.15	1.17	1.19	1.21	1.22	1.24	1.26	1.28	1.30	1.32	1.34	1.36	1.38	1.40	1.42	1.44	1.46	1.48	1.50	1.52	



**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.

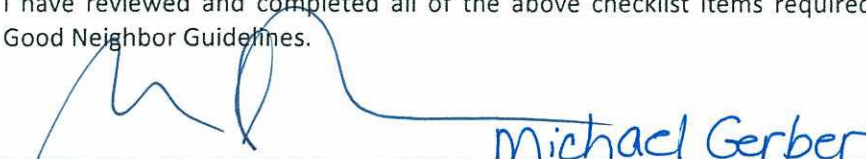
**(3) Pre-Application Engagement**

- 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.

  
Signed \_\_\_\_\_ printed name Michael Gerber date 5/5/2014



**Position Description**

**Title: VASH Coordinator/Housing Eligibility Specialist**  
**Supervisor: Assisted Housing Director**  
**Classification: Non-exempt**

**Duties and Responsibilities**

Responsible for Coordinating all aspects of the VASH (Veteran’s Affairs Supportive Housing Program), and implementing the complete leasing cycle under HACA's tenant based assisted housing programs, primarily the Housing Choice Voucher Program. Performs a variety of tasks related to the HCV leasing cycle. The employee may perform some or all of the specific duties listed below.

**Duties for VASH program**

Coordinates all aspects of the VASH program to include special reporting to HUD, development of policies to implement the program; coordination of services with the Veteran Administration Department, tracking lease-up and requesting additional client referrals when vacancies occur.

Client services for the VASH program to include completing initial orientations, completing re-exams and interim reviews, ongoing rent determinations; helping veterans find suitable homes; requesting inspections and executing leases/contracts.

Assists with receiving incoming portables for the VASH program, billing initial agency and collecting and recording payments from the initial PHA.

**Duties for HCV program**

Conducts yearly and interim reviews of family income and household composition to determine continued eligibility and benefit level.

Schedules re-exam appointment, collects documentation, makes revisions, calculates rent adjustments, notifies residents and landlords orally and/or in writing of changes.

Writes up leases and contracts, obtains client and owner signatures, documents and compiles file, and submits for case screening.

Establishes and maintains excellent working relationships with program clients and owners and answers resident and landlord questions.

Provides information to clients about available housing options and how to choose quality housing and provides clients with resources and referral information needed to work towards self-sufficiency.

Receives incoming mail and takes appropriate action or files necessary information into client files. Also, maintains client records in the computer.

Request inspections of dwelling units and prepares inspection form.

Performs clerical duties such as answering telephone, general typing, filing and mailing correspondence.

Prepares monthly reports to advise supervisor of caseload status.

Performs other duties as assigned by supervisor.

### **Qualifications and Knowledge**

College degree in Business Administration or Social Science and one year of experience in providing social services to recipients, or an equivalent combination of education and experience.

Knowledge of general office practices and procedures, business English and basic arithmetic.

Some knowledge of standard bookkeeping principles, practices, and techniques.

Knowledge of HUD and Authority policies, procedures and practices pertaining to the HCV programs.

Skill in operating general office machines and computers.

Ability to communicate and relate to persons of diverse backgrounds and abilities and establish and maintain effective working relationships with other employees and residents.

Bondability.

Valid Texas driver's license.

Eligibility for coverage under Authority fleet auto insurance.

**Supervision Received and Given**

The employee receives work assignments from the Vice President of Assisted Housing, Assisted Housing Director, Compliance Supervisors and Compliance Manager. Priorities and time frames are established by the supervisor to achieve department goals. The supervisor monitors the employee's work for thoroughness, neatness and compliance with procedures and guidelines. However, the Housing eligibility specialist is responsible for setting priorities to effectively manage their caseload and assist the department in accomplishing goals. The employee has no supervisory responsibilities.

**Guidelines**

The employee follows the Authority's policies and procedures, HUD regulations and past experience in accomplishing assignments. Methods for properly managing their caseload is at the discretion of the employee, subject to existing practices and procedures. When unusual situations arise, the employee may request guidance from the supervisor.

**Complexity**

On a daily basis the employee performs a variety of tasks, which requires the employee to exercise good personal judgement in making decisions in accomplishing assignments.

**Scope and Effect**

The employee's work primarily affects the administrative output of the Assisted housing office. A good job performance by the employee enhances the department's ability to provide housing and assistance to HACA residents.

**Personal Contacts**

The employee's personal contacts are with applicants, property owners, residents, other employees and community social service agencies. The purpose of such contacts is to obtain information and documentation needed by HACA for housing families and providing assistance to families.

**Physical Demands**

Work is principally sedentary, but may involve some physical exertion, such as kneeling, crouching, or lifting to obtain files and records, and eyestrain from working with computers and other office equipment.

**Work Environment**

Work involves the normal risks and discomforts associated with an office environment, but is usually in an area that is adequately cooled, heated, lighted, and ventilated.

## VASH (Veterans Affairs Supportive Housing) Summary

The HUD-Veterans Affairs Supportive Housing (HUD-VASH) program combines Housing Choice Voucher (HCV) rental assistance for homeless Veterans with case management and clinical services provided by the Department of Veterans Affairs (VA). VA provides these services for participating Veterans at VA medical centers (VAMCs) and community-based outreach clinics.

Every year since 2008, HUD and VA have awarded HUD-VASH vouchers based on geographic need and public housing agency (PHA) administrative performance. The allocation process for HUD-VASH vouchers is a collaborative approach that relies on three sets of data: HUD's point-in-time data submitted by Continuums of Care (CoCs), VAMC data on the number of contacts with homeless Veterans, and performance data from PHAs and VAMCs. After determining which areas of the country have the highest number of homeless Veterans, the VA Central Office identifies VA facilities in the corresponding communities. HUD then selects PHAs near to the identified VA facilities, taking into consideration the PHAs' administrative performance, and sends the PHAs invitations to apply for the vouchers. Currently, the Housing Authority of the City of Austin has 355 VASH vouchers.

Updated information can be found at the VASH portal on the HUD website:

[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/public\\_indian\\_housing/programs/hcv/vash](http://portal.hud.gov/hudportal/HUD?src=/program_offices/public_indian_housing/programs/hcv/vash)

### Process to receive VASH assistance

1. The VA determines initial eligibility for the program. The VA identifies eligible homeless veterans and refers the veteran to the Housing Authority.
2. Veterans locate a unit to lease in the private rental market. The VA's caseworker helps with the housing search and finding services to help veterans move into a new unit.
3. Veterans pay approximately 30% of their adjusted income to the property owner and the Housing Authority of the City of Austin pays the remaining rent to the owner on the first of the month. Rental assistance provided follows the regular Housing Choice Voucher rules and guidelines.
4. Each unit assisted is required to pass a housing quality standards inspection.

### History of VASH vouchers allocated to the Housing Authority of the City of Austin

Effective date	# of units
11/1/2013	50
7/1/2013	35
4/1/2012	100
8/1/2011	50
7/1/2010	50
10/1/2009	70
<b>Total vouchers</b>	<b>355</b>

Austin Affordable Housing Corporation (AAHC) owns five apartment complexes throughout the city of Austin. They are: Bent Tree Apartments, Park at Summers Grove, Sterling Village Apartments, Sweetwater Apartments and Lexington Hills Apartments. All rents, community wide are purposely discounted \$75-\$100 below the area market rent to provide affordability to the area in which the property is located. As participants of the Affordable Housing Program, Sweetwater and Sterling Village lease at least 35% of their units to households designated as Low Income (80% of the Area Median Income) and Very Low Income (50% or less of the Area Median Income). Park at Summers Grove is a general partnership interest of a tax credit property where rents cannot exceed 60% of median family income.

All AAHC properties participate in single-stream recycling programs. Residents are invited several times a year to participate in seminars on energy efficiency and water savings techniques to implement in their homes. Through partnerships with neighborhood banks, the sites provide free basic money management training which includes check-book balancing, household budgeting and savings opportunities. Additionally, the sites host semi-annual job fairs, in which local businesses such as restaurants, retailers, grocery stores, banks and early childhood education facilities are invited. Partnerships have also been formed with ACC campuses to educate residents on resume preparation and basic interview techniques. AAHC and its residents also support various service projects each year including Turkeys Tackling Hunger, Toys for Tots, Blue Santa and Coats for Kids as well as annual school supply drives and Red Cross donation drives.

The sites also offer services through CARES teams designed to meet the life needs of residents and provide additional support to the staff. Resident Care includes providing a caring touch during times such as life transitions, job loss, the birth of a baby, etc., which can be critical times in the life of a resident and ultimately affect their housing decisions. Tuesday Tutoring, Zumba, Cookie Swap, Blanket Drive were some of the events held in 2013.

In addition, each apartment staff hosts:

- Various health-awareness seminars focusing on proper nutrition and exercise habits
- “Spring” themed events from Easter egg hunts to sessions with home & finance organization experts
- “Welcome to Summer” parties in which the Fire Department representatives visit each site, conducting fire-safety awareness visits allowing residents an opportunity to tour a working fire and rescue vehicle and receive fire-safety tips
- “National Night Out” Parties including food, games and prizes with visits from the Austin Police Department, Austin Fire Department and Travis County Sheriff’s office
- Financial Literacy Awareness week in April, partnering with Financial Fitness Greater Austin to offer financial literacy classes

AAHC’s staff also offers the following programs to Housing Authority of the City of Austin (HACA) public housing and Section 8 residents:

- Six-Star Program – See Attached Flyer
- Down Payment Assistance Program – See Attached Flyer
- Equity CLT Program – See Attached Flyer

**Suzanne Schwertner, NMLS# 329226**

Homeownership Coordinator  
Austin Affordable Housing Corporation *and*  
Equity CLT

*A subsidiary of The Housing Authority City of Austin*

1124 S IH 35, Austin, TX 78704

Office: 512-767-7796

Mobile: [REDACTED]

Fax: 512-476-4639

Email: [suzannes@hacanet.org](mailto:suzannes@hacanet.org)

Web: [www.hacanet.org](http://www.hacanet.org)

*Bringing Opportunity Home*

## *Who We Are....*

Equity CLT is a non-profit subsidiary of the Austin Housing Authority. Our mission is to help make home ownership possible for low- income homebuyers who are unable to purchase a home in the conventional market. By applying the community land trust model, we are able to assist low-income families in need of housing now, while permanently preserving affordable housing in the community for future generations

The benefits of working with Equity CLT to purchase a home are in-house mortgage financing, pre-purchase and post-purchase education and continued stewardship support.

To Learn more, attend one of our Homebuyer Orientations.

### Upcoming Sessions

Equity CLT

1124 S. IH 35  
Austin, TX 78704

Phone: 512/ 477-4488

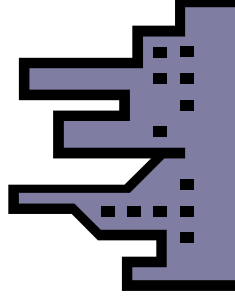
Fax: 512/ 476-4639

E-mail: [suzannes@hacanet.org](mailto:suzannes@hacanet.org)

Equity CLT

BUYING YOUR HOME  
THROUGH EQUITY  
COMMUNITY LAND  
TRUST

*Making the Dream of  
Homeownership a Reality for Low-  
Income Households*



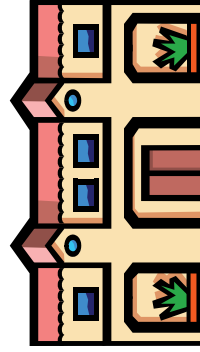
**Equity Community Land  
Trust**

**Tele: 512/477-4488  
Fax: 512/476-4639**



## Why buy from Equity CLT

- Opens homeownership to low- income families and individuals who are excluded from market -priced homes.
- First-time homeowners are supported before, during and AFTER they purchase through homeownership education, credit and mortgage finance counseling, and basic home maintenance classes
- Fair return on investment into home through a predetermined formula agreed upon in land lease .



## Homeownership through Equity CLT is similar to traditional homeownership in that.....

- THE HOMEOWNER obtains a mortgage
- THE HOMEOWNER accumulates equity
- THE HOME can be inherited by the homeowner's spouse or children
- THE HOMEOWNER can make alterations and improvements to the home and land.

## Homeownership through Equity CLT is different from traditional homeownership in that.....

- THE LAND TRUST purchase price is lower—about 20-30 percent below the market rate
- THE CLT owns the land under the Land Trust home and the homeowner leases the land from the CLT for an affordable fee (\$30/month)
- THE RESALE FORMULA ensures that the Land Trust home will remain affordable for the next homeowner in the future.

## Steps to Homeownership with ECLT

1. Attend free orientation session
2. Complete ECLT Housing Pre-Application
3. Allow ECLT to obtain current credit report
4. Attend a free Homebuyer Education Workshop
5. Schedule time with ECLT loan officer to review your application and get pre-approved for a mortgage
6. Review ECLT Land Lease with an Attorney
7. Sign a Purchase Agreement
8. Successfully purchase your own home!

### Annual Gross Income

Household Size	No Higher Than
1	\$41000
2	\$46850
3	\$52700
4	\$58550
5	\$63250
6	\$67950
7	\$72650
8	\$77300



# Housing Authority of the City of Austin Down Payment Assistance Program

*If you live in one of HACA's Public Housing communities or you are on HACA's Housing Choice Voucher Program (Section 8), you may qualify for our Down Payment Assistance Program.*

## **WHAT DOES THIS MEAN?**

HACA will contribute \$10,000 to your closing costs and/or down payment when you buy a house. The funds will be in the form of a second lien with no payments and will be forgiven after you occupy your home for 5 years. Once you become a homeowner, your HACA assistance (Section 8) will end.

## **WHAT REQUIREMENTS DO I NEED TO MEET?**

- \*First-time homebuyer
- \*Attend Homebuyer Education Class (Schedule included)
- \*Mortgage Loan approval through a bank or mortgage company
- \*Good standing with HACA (cannot owe any money to HACA or be on probation)
- \*Contribute \$2,500 of your own funds to the transaction

## **HOW DO I APPLY?**

Contact Suzanne Schwertner at (512) 767-7796 or email at [suzannes@hacanet.org](mailto:suzannes@hacanet.org) to sign up for First-Time Homebuyer Class and to get application packet with additional information on the program.

## **SIX-STAR RESIDENT PROGRAM**

This is a three-year program and once the family is housed under this program public housing assistance is relinquished.

### *Eligibility requirements:*

- ❖ Exclusive to participants of HACA's Public Housing program who have completed their first year in the program.
- ❖ Must be in good standing with HACA prior to submission of their application for assistance. (Cannot have outstanding balance owed to HACA or be on probation)
- ❖ The apartment provided must be participant's primary residence.
- ❖ Once housed, resident must give up their public housing assistance.
- ❖ Each family will be required to meet the following six star criteria:
  - ✓ **pay their rent on time;**
  - ✓ **take care of the property;**
  - ✓ **be drug free and free from dependence on alcohol;**
  - ✓ **keep their children in school;**
  - ✓ **maintain full-time employment; and**
  - ✓ **be registered to vote.**
- ❖ Participants must pass a criminal background check, and are subject to credit and rental history approval.
- ❖ Participants will be subject to all other rules and regulations set by the apartment complex as outlined in the lease provided by the property.
- ❖ No application fee or security deposit will be charged.
- ❖ Number of family members must not exceed 2 times the number of bedrooms.
- ❖ Residents will pay rent and utilities.

### **Lease Amounts**

<b>Unit Description</b>	<b>Six Star Resident Amount</b>	<b>Market Value</b>
2 bedroom/1 bath	\$250 yr 1, \$300 yr 2,\$350yr3	\$629
2 bedroom/2 bath	\$300 yr 1, \$350 yr 2,\$400yr3	\$689

\*\*Rates are dependent upon property location and are subject to change.

A number of units will be available at the following locations only:

**Sterling Village Apartments** located at N Lamar & Rundberg.

**Bent Tree Apartments** located at N Mopac & Steck

**Sweetwater Apartments** located at Wells Branch Parkway.

**Park at Summers Grove** located on Century Park Blvd.

**Lexington Hills** located off Riverside and Wickersham

**Contact Suzanne Schwertner at 512.767.7796 to apply for this program.**



# HOUSING AUTHORITY OF THE CITY OF AUSTIN

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## Senior and Disabled Services

The Housing Authority of the City of Austin dedicates four of its 19 developments to housing the senior and disabled population. In addition to those four sites, all 19 of HACA's communities include senior citizens. Below are services we provide to our senior residents. Please contact a Resident Wellness Specialist or Resident Opportunities for Self Sufficiency Specialist.



### Senior Mayfest

Every year HACA sponsors a Senior Mayfest open to all senior residents. Businesses and organizations that cater to the elderly are invited to set up booths. The event is a fun mix of food, entertainment and information.

### Health and Safety Fairs

Health and Safety Fairs are sponsored by HACA at all sites, with special emphasis on the elderly and disabled. Similar to Senior Mayfest, the events bring residents together with community resources related to health and safety.

### Elders Living Well

Elders Living Well program, in partnership with Family Eldercare, promotes a community in which older adults are active and engaged and the barriers to aging in place are proactively addressed. The program provides services such as needs assessment, service coordination, case management, educational seminars, benefits counseling, volunteer opportunities as well as recreation and socialization activities at each of the four Elderly/Disabled properties.

### Participating Providers

#### **Social Security Administration National Toll free Hotline**

1-800-772-1213 ; 1-800-325-0778 TDD

#### Participating Providers Blue Cross Blue Shield of Texas, Inc., Dallas

1-800-442-2620

#### Local Department of Human Services or National Heritage Insurance Company, Austin

1-800-252-8263

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**Texas Department on Aging Information and Referral Hotline, Austin**

1-800-252-9240

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**Texas Department of Human Services/Bureau of Long Term Care, Austin**

1-800-458-9858

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**Texas Department of Health, Austin**

1-800-228-1570

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G rfwruv#R iilfh#

**Texas Board of Medical Examiners, Austin**

1-800-201-9353

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iru#kh#J dw#J xlg#

**Texas Department of Insurance, Austin**

1-800-252-3439

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**Food Stamps and TANF (Benefits Inquiries)**

1-800-448-3927

**Fair Housing**

1-800-669-9777

**Legal Hotline for Older Texans**

1-800-622-2520

**Texas Crime Stoppers**

1-800-252-8477

**Austin Groups for the Elderly (A.G.E.)**

3710 Cedar St., Box 2

Austin, TX 78759

Phone: 451-4611

Fax: 451-3100

**Adult Protective Services**

7900 Cameron Rd.

Austin, TX 78754

Phone: 834-3351

Fax: 834-4738

**Alzheimer's Association, Greater Austin Chapter**

P.O. Box 4829

Austin, TX 78765

Phone: 454-5476

Fax: 454-4187

**Area Agency on Aging of the Capital Area**

2512 South IH-35, Suite 340  
Austin, TX 78704  
Phone: 916-6062  
Fax: 916-6042

**Austin Energy**

721 Barton Springs Road  
Austin, TX 78704  
Phone: 322-6130  
Fax: 322-6160

**APD Community Liaison**

715 E. 8th Street  
Austin, TX 78701  
Phone: 459-6257

**City of Austin PARD Senior Support Services**

1190 Hargrove  
Austin, TX 78702  
Phone: 480-3005  
Fax: 474-1881

**Disability Assistance of Central Texas**

9027 Northgate Blvd., Suite 108  
Austin, TX 78758  
Phone: 834-1942  
Fax: 834-9504

**Easy Rider — Capital Metro**

2910 East 5th Street  
Austin, TX 78702  
Phone: 389-7400

**Family Eldercare**

1700 Rutherford Ln.  
Austin, TX 78754  
Phone: 450-0844

**Helping the Aging, Needy and Disabled, Inc.**

2200 E. MLK Jr Blvd.  
Austin, TX 78702  
Phone: 477-3796

**Prevent Blindness**

1100 W. 45th Street  
Austin, TX 78756  
Phone: 459-8936  
Fax: 459-8937

**Retired and Senior Volunteer Program (RSVP)**

P.O. Box 1748  
Austin, TX 78702  
Phone: 473-4130

**Safeplace**

P.O. Box 19454

Austin, TX 78760  
Phone: 356-1568

**S.A.L.T. (Seniors and Law Enforcement Together)**

6407 Cooper Lane  
Austin, TX 78745  
Phone: 441-1816

**Texas Legal Services Center**

815 Brazos, Suite 1100  
Austin, TX 78701  
Phone: 477-6000

**Texas Assurance Care Senior Planners**

3432 Greystone Dr., Ste. 120  
Austin, TX 78731  
Phone: 343-5400

**Texas Medical Foundation**

Barton Oaks Plaza 2, Ste. 200, 901 MoPac South  
Austin, TX 78746  
Phone: 329-6610

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