

APPLICATION CHECKLIST/ INFORMATION FORM

DEVELOPER : Austin Habitat for Humanity, Inc.	OWNER/BORROWER NAME : Austin Habitat for Humanity, Inc.
DEVELOPMENT NAME : Montopolis Townhomes	FUNDING CYCLE DEADLINE : February 3, 2023
FEDERAL TAX ID NO: 74-2373217	DUNS NO: 603218900
PROJECT ADDRESS: 6301 Circulo de Amistad, 78741	PROGRAM : RHDA / OHDA / BOTH OHDA
CONTACT NAME : Andy Alarcon/Kate Reznick	AMOUNT REQUESTED: \$360,000
CONTACT ADDRESS AND PHONE : 500 W. Ben White Blvd., Austin, TX 78704 512-472-8788	

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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.

<p>SIGNATURE OF APPLICANT <input type="text"/></p> <p>PRINTED NAME <input type="text" value="Phyllis Snodgrass"/></p> <p>TITLE OF APPLICANT <input type="text" value="Chief Executive Officer"/></p> <p>DATE OF SUBMISSION <input type="text" value="30-Jan-23"/></p>	<p>DATE AND TIME STAMP OF RECEIPT</p> <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
FOR AHFC USE ONLY	

AUSTIN HABITAT FOR HUMANITY
APPLICATION FOR OWNERSHIP HOUSING DEVELOPMENT ASSISTANCE
(OHDA) - 2023

EXECUTIVE SUMMARY

Austin Habitat for Humanity is requesting continued support from the City of Austin to create 12 units of affordable housing at 6301 Círculo de Amistad, Austin, TX 78741 (Council District 3). Austin Habitat is the current owner of the land, and we plan to develop it into two-, three- and four-bedroom homes that will be sold at affordable rates to hardworking, low-to-moderate income community members. We are grateful for the City's previous support.

As detailed in the attached spreadsheets and support documentation, Austin Habitat for Humanity is requesting support in the amount of \$360,000 through the City's Ownership Housing Development Assistance Program (OHDA) to support vertical construction of 12 homes (six duplexes). As mentioned above, the City has supported the first two phases of this development as well as numerous other Austin Habitat developments throughout the years.

We are requesting support from the City of Austin to fill a funding gap due to rising construction costs over the past several years. Austin Habitat's team originally estimated that the infrastructure portion of the construction of the Montopolis Townhomes would cost less than \$400,000; when we solicited for bids, the amount was \$760,000. We will be required to spend additional funds on this and will have a gap as we begin vertical construction. While we are currently soliciting sponsorships and expect to have a robust sponsor base for this build, we recognize that the sponsor opportunities available will not be sufficient to complete the entire build by in 2023-2024 as planned.

The Montopolis/Círculo de Amistad property is located in East Austin directly behind Montopolis Drive, between Montopolis and Vargas Avenue. This area is currently experiencing Stage 1 gentrification (and on the border of an area experiencing Dynamic gentrification) according to maps provided by the City. The 78741 zip code ranks #41 of 43 zip codes in Austin with respect to annual median income, indicating a strong presence of low-to-moderate income individuals in the area, and Austin Habitat has previously worked in this area to assist families in obtaining and maintaining stable, affordable homes. Austin Habitat has owned this property since 1996 and began working in the area in the late 1990s, creating the Mary Vice Estates Planned Unit Development (PUD) and building 22 affordable homes in the area. Please see attached map detailing the boundaries and regulations relating to this PUD.

The current development encompasses the creation of six two-bedroom townhome condominiums; four three-bedroom townhome condominiums; and two four-bedroom townhome condominiums, maximizing the number of high-quality affordable homes that can be built for partner families on this small homesite. We anticipate that the two-bedroom units (1,104 square feet) will have a sale price of \$145,000; the three-bedroom units (up to 1,300 square feet) will be sold for \$180,000; and the four-bedroom units (1,662 square feet) will sell for \$200,000. These pricing estimates may change slightly when the City of Austin releases new income limits based on the U.S. Department of Housing and Urban Development (HUD) 2023 limits.

All units will be sold to partner families whose annual household income is at or below 80% of the Median Family Income (MFI) for the Austin-Round Rock Metropolitan Statistical Area (MSA). Although we accept families earning up to 80% MFI, our families earn an average of 55% MFI, despite many family members holding down multiple jobs.

The families who purchase homes at the Montopolis/Círculo de Amistad development, like all of the families who buy homes through Austin Habitat, will be required to make a strong and ongoing investment in successful homeownership. All project participants receive financial education and one-on-one counseling through our in-house, HUD-certified Housing Counseling Program, as well as completing 200 “sweat equity” hours building their own home or other Habitat homes and/or providing additional volunteer services.

Austin Habitat’s affordable home-building model depends on the ongoing support of corporate sponsors, foundation grantors, faith-based groups and others who invest in our communities through financial support and volunteer time. Our team has consistently raised funds to support each home through the recruitment of sponsors that provide donations from \$5,000 to \$100,000 and receive volunteer opportunities and positive recognition, as well as a unique and meaningful team-building experience working alongside our team and families. In 2022, we welcomed more than 7,500 volunteers including corporate groups, congregations, service clubs and dedicated individuals. These volunteers provided approximately \$1.5 million worth of labor.

With respect to supportive services, the Affordable Homeownership Program includes intensive financial and housing counseling and education, and refers families as-needed to other organizations that can assist them in increasing readiness to attain their homeownership goals. Each family receives a wide-ranging, personalized assessment of their financial situation and a detailed action plan to eliminate barriers to successful homeownership. In addition, the Austin Habitat team works with Central Texas Food Bank to stock the home when the family moves in. Please see attached Tab 4e for a more detailed description of the resident services provided.

Austin Habitat is also committed to providing environmentally-friendly homes as well as keeping utility costs low for our hardworking families. The team currently plans to provide several energy-efficiency upgrades for the Montopolis Townhomes to meet the standards of the U.S. Department of Energy Zero-Energy Ready Home program. The team is currently determining the most impactful and cost-effective means for becoming Zero-Energy Ready, including mechanical dehumidifiers, external insulation, and upgraded window and roof materials.

Compliance with City Ordinances: All homes constructed by Austin Habitat for Humanity comply with the City of Austin Visitability Ordinance, City Code 25-12-243 §R320, as amended. Austin Habitat also complies with all accessibility requirements for S.M.A.R.T. housing. Austin Habitat builds to the specification of the client, and an accessibility upgrade package, including widened doors, a roll-in shower and grab bars, is available at the homeowner’s request. Finally, Austin Habitat complies with all City ordinances and plans and obtains all required inspections from City inspectors for all homes built within the City.

Sources and Uses of Funds

Sources		Uses	
Debt		Acquisition	\$199,833
Equity	\$2,181,833	Off-Site	\$190,900
Grant	\$1,166,460	Site Work	\$760,133
Other		Building Costs	\$2,613,453
Previous AHFC	\$571,610	Contractor Fee	\$240,000
Current Request	\$360,000	Soft Costs	\$105,259
		Developer Fee	\$178,325
Total	\$4,279,903	Total	\$4,279,903

Project Summary Form

1) Project Name Montopolis Townhomes	2) Project Type 100% Affordable	3) New Construction or Rehabilitation New Construction
4) Address(s) or Location Description 6301 Circulo de Amistad, Austin TX 78741		5) Mobility Bond Corridor
6) Census Tract 23.12	7) Council District District 3	8) Elementary School ALLISON EL
9) Affordability Period 99 Years		
10) Type of Structure Multi-family	11) Occupied? No	12) How will funds be used? Construction

13) Summary of Rental Units by MFI Level

Income Level	Efficiency	One Bedroom	Two Bedroom	Three Bedroom	Four (+) Bedroom	Total
Up to 20% MFI						0
Up to 30% MFI						0
Up to 40% MFI						0
Up to 50% MFI						0
Up to 60% MFI						0
Up to 80% MFI						0
Up to 120% MFI						0
No Restrictions						0
Total Units	0	0	0	0	0	0

14) Summary of Units for Sale at MFI Level

Income Level	Efficiency	One	Two	Three	Four (+)	Total
Up to 60% MFI						0
Up to 80% MFI			6	4	2	12
Up to 120% MFI						0
No Restrictions						0
Total Units	0	0	6	4	2	12

15) Initiatives and Priorities (of the Affordable Units)

Initiative	# of Units	Initiative	# of Units
Accessible Units for Mobility Impairments	1	Continuum of Care Units	0
Accessible Units for Sensory Impairments	1		

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

16) Is the property within 1/2 mile of an Imagine Austin Center or Corridor? Yes

17) Is the property within 1/4 mile of a High-Frequency Transit Stop? Yes

18) Is the property within 3/4 mile of Transit Service? Yes

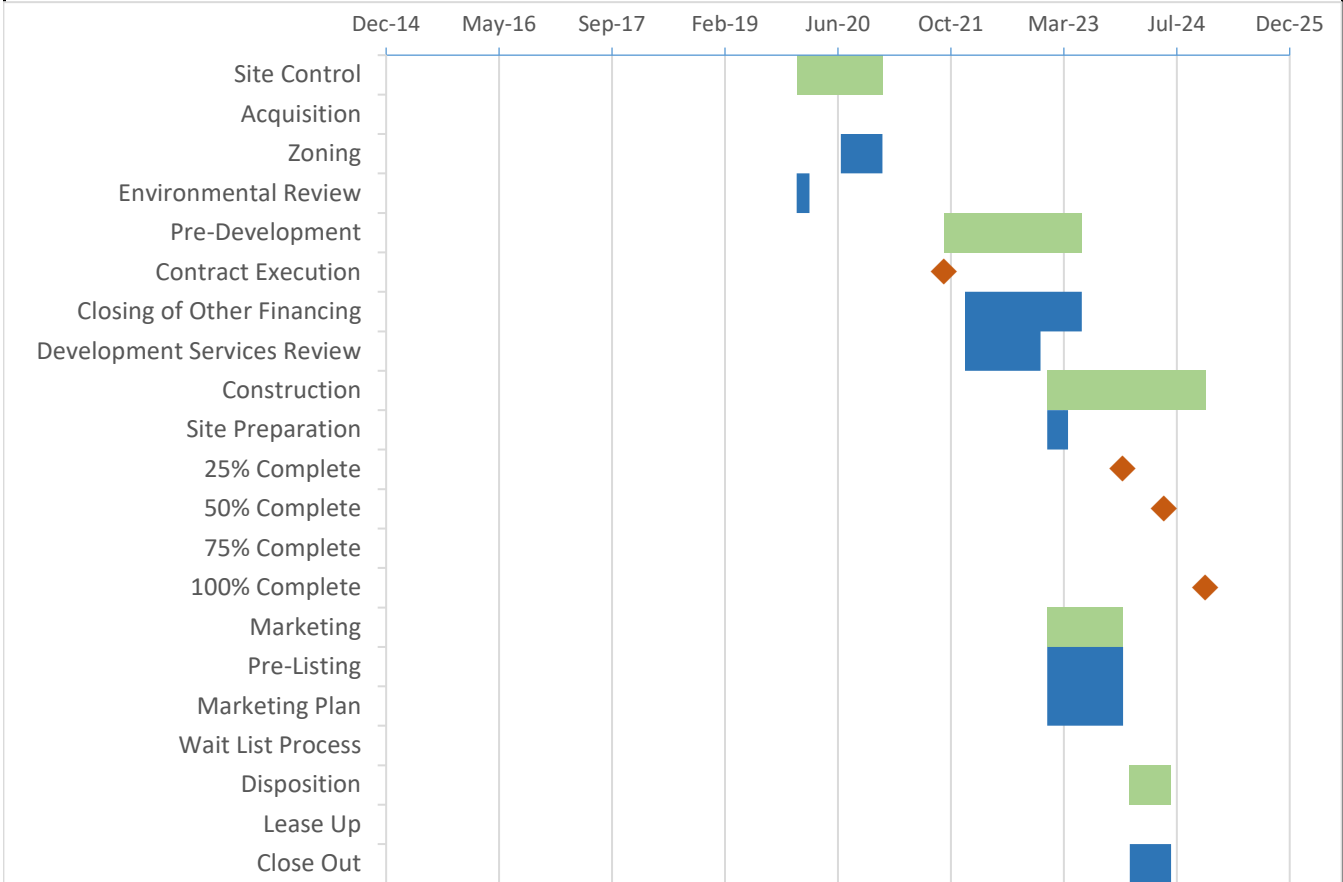
19) The property has Healthy Food Access? No

20) Estimated Sources and Uses of funds

<u>Sources</u>		<u>Uses</u>	
Debt		Acquisition	191,833
Equity	2,181,833	Off-Site	190,900
Grant	1,166,460	Site Work	760,133
Other		Sit Amenities	
Deferred Developer Fee (not applicable for OHDA)		Building Costs	2,613,453
Previous AHFC Funding	571,610	Contractor Fees	240,000
Current AHFC Request	360,000	Soft Costs	105,259
		Financing	
		Developer Fees	178,325
Total \$	4,279,903	Total \$	4,279,903

Development Schedule

	Start Date	End Date
Site Control	Dec-19	Dec-20
Acquisition		
Zoning	Jul-20	Dec-20
Environmental Review	Dec-19	Feb-20
Pre-Development	Oct-21	Jun-23
Contract Execution	Oct-21	
Closing of Other Financing	Jan-22	Jun-23
Development Services Review	Jan-22	Dec-22
Construction	Jan-23	Dec-24
Site Preparation	Jan-23	Apr-23
25% Complete	Dec-23	
50% Complete	Jun-24	
75% Complete		
100% Complete	Dec-24	
Marketing	Jan-23	Dec-23
Pre-Listing	Jan-23	Dec-23
Marketing Plan	Jan-23	Dec-23
Wait List Process		
Disposition	Jan-24	Jul-24
Lease Up		
Close Out	Jan-24	Jul-24



Development Budget

	Total Project Cost	Requested AHFC Funds	Description
Pre-Development			
Appraisal	2,500		
Environmental Review	1,500		
Engineering	66,900		
Survey	10,000		
Architectural	110,000		
Subtotal Pre-Development Cost	\$190,900	\$0	
Acquisition			
Site and/or Land	191,833		
Structures			
Other (specify)			
Subtotal Acquisition Cost	\$191,833	\$0	
Construction			
Infrastructure	760,133		
Site Work	96,000	13224	
Demolition		0	
Concrete	251,520	34647	
Masonry	9,600	1323	
Rough Carpentry	462,000	63640	
Finish Carpentry	43,200	5951	
Waterproofing and Insulation	54,270	7476	
Roofing and Sheet Metal	53,880	7422	
Plumbing/Hot Water	178,200	24547	
HVAC/Mechanical	125,550	17294	
Electrical	153,900	21199	
Doors/Windows/Glass	48,600	6695	
Lath and Plaster/Drywall and Acoustical	80,838	11135	
Tiel Work		0	
Soft and Hard Floor	81,300	11199	
Paint/Decorating/Blinds/Shades	112,950	15559	
Specialties/Special Equipment	84,000	11571	Energy efficiency upgrades \$7,000 per unit
Cabinetry/Appliances	38,400	5289	
Carpet		0	
Other (specify)	528,726	72831	Construction Escalator (\$213,746); Inspections (\$25,200); Uti
Construction Contingency	210,519	28998	
Subtotal Construction Cost	\$3,373,586	\$360,000	
Soft & Carrying Costs			
Legal	52,000		
Audit/Accounting			
Title/Recordin			
Architectural (Inspections)	18,000		
Construction Interest			
Construction Period Insurance			
Construction Period Taxes			
Relocation			
Marketing	35,259		
Davis-Bacon Monitoring			
Developer Fee	178,325		
Other (specify)	240,000		Construction Management Fee - construction team labor, su
Subtotal Soft & Carrying Costs	\$523,584	\$0	
TOTAL PROJECT BUDGET	\$4,279,903	\$360,000	

Projected Affordability Data for Home Sales (OHDA)

	Unit Model 1	Unit Model 2	Unit Model 3	Unit Model 4	Unit Model 5	Unit Model 6	Unit Model 7
Number of Units	6	4	2				
Number of Bedrooms	2	3	4				
Square Footage	1104	1300	1662				
Anticipated Sale Price	\$0	\$0	\$0				
Borrower Contribution	\$3,000	\$3,000	\$0				
Homebuyer Subsidy	\$0	\$0	\$0				
Total Principal Amount of Mortgage	\$145,000	\$180,000	\$200,000				
Anticipated Interest Rate	6.00%	6.00%	6.00%				
Monthly Principal Amount	\$144	\$179	\$199				
Monthly Interest	\$725	\$900	\$1,000				
Estimated Monthly Taxes	\$266	\$330.00	\$366.67				
Estimated Monthly Insurance	\$60.42	\$75.00	\$83.33				
HOA Constribution	\$150.00	\$150.00	\$150.00				
TOTAL Estimated PITI	\$1,345.60	\$1,634.19	\$1,799.10				

Project Name	Montopolis Townhomes	
Project Type	100% Affordable	
Council District	District 3	
Census Tract	23.12	
Prior AHFC Funding	\$571,610	
Current AHFC Funding Request Amount	\$360,000	
Estimated Total Project Cost	\$4,279,903	
High Opportunity	No	
High Displacement Risk	YES	
High Frequency Transit	Yes	
Imagine Austin	Yes	
Mobility Bond Corridor	0	
SCORING ELEMENTS		Description
UNITS		
< 20% MFI	0	# of rental units at < 20% MFI
< 30% MFI	0	# of rental units at < 30% MFI
<i>District Goal</i>	10%	% of City's affordable housing goal
<i>High Opportunity</i>	FALSE	% of City's affordable housing goal for high opportunity areas
<i>Displacement Risk</i>	33%	% of City's affordable housing goal to reduce displacement
<i>High Frequency Transit</i>	9%	% of City's affordable housing goal near high frequency transit
<i>Imagine Austin</i>	9%	% of City's affordable housing goal in imagine austin corridors
<i>Geographic Dispersion</i>	0%	% of City's affordable housing goal to increase geographic dispersion
<i>Mobility Bond Corridor</i>	0%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 50%, max of 75
< 40% MFI	0	# of rental units at < 40% MFI
< 50% MFI	0	# of rental units at < 50% MFI
<i>District Goal</i>	10%	% of City's affordable housing goal
<i>High Opportunity</i>	FALSE	% of City's affordable housing goal for high opportunity areas
<i>Displacement Risk</i>	33%	% of City's affordable housing goal to reduce displacement
<i>High Frequency Transit</i>	9%	% of City's affordable housing goal near high frequency transit
<i>Imagine Austin</i>	9%	% of City's affordable housing goal in imagine austin corridors
<i>Geographic Dispersion</i>	0%	% of City's affordable housing goal to increase geographic dispersion
<i>Mobility Bond Corridor</i>	0%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 25%, max of 75
< 60% MFI	0	# of units for purchase at < 60% MFI
<i>District Goal</i>	10%	% of City's affordable housing goal
<i>High Opportunity</i>	FALSE	% of City's affordable housing goal for high opportunity areas
<i>Displacement Risk</i>	33%	% of City's affordable housing goal to reduce displacement
<i>High Frequency Transit</i>	9%	% of City's affordable housing goal near high frequency transit
<i>Imagine Austin</i>	9%	% of City's affordable housing goal in imagine austin corridors
<i>Geographic Dispersion</i>	0%	% of City's affordable housing goal to increase geographic dispersion
<i>Mobility Bond Corridor</i>	0%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 50%, max of 75
< 80% MFI	12	# of units for purchase at < 80% MFI
<i>District Goal</i>	10%	% of City's affordable housing goal
<i>High Opportunity</i>	FALSE	% of City's affordable housing goal for high opportunity areas
<i>Displacement Risk</i>	33%	% of City's affordable housing goal to reduce displacement
<i>High Frequency Transit</i>	9%	% of City's affordable housing goal near high frequency transit
<i>Imagine Austin</i>	9%	% of City's affordable housing goal in imagine austin corridors
<i>Geographic Dispersion</i>	0%	% of City's affordable housing goal to increase geographic dispersion
<i>Mobility Bond Corridor</i>	0%	% of City's affordable housing goal within mobility bond corridors
SCORE	2	% of annual goal * units * 25%, max of 75
Unit Score	2	MAXIMUM SCORE = 300
INITIATIVES AND PRIORITIES		
<i>Continuum of Care</i>	0	Total # of units provided up to 100 per year
Continuum of Care Score	0	(total CoC Units/100 + HF Units/50)*20
Access to Healthy Food	No	Within 1 Mile of Healthy Food (City GIS)
Continuum of Care Weighted Score	0	Mobility, Access to Jobs, Community Institutions, Social Cohesion
<i>2 Bedroom Units</i>	6	Total Affordable 2 Bedroom units
<i>3 Bedroom Units</i>	4	Total Affordable 3 Bedroom units
<i>4 Bedroom Units</i>	2	Total Affordable 4+ Bedroom units
Multi-Generational Housing Score	20	Multi-bedroom Unit/Total Units * 20
TEA Grade	80	Elementary School Rating from TEA
Multi-Generational Housing Weighted Score	4	Educational Attainment, Environment, Community Institutions, Social Cohesion,
<i>Accessible Units</i>	2	mobility and sensory units
<i>Non-PSH, Non-Voucher Under 20% MFI</i>	0	Total units under 20% MFI
Accessibility Score	3	Accessible Unit/Total Units * 20
Metro Access Service	Yes	Within 3/4 mile of fixed route transit
Accessibility Weighted Score	1	Housing Stability, Health, Mobility, Community Institutions
Initiatives and Priorities Score	28	MAXIMUM SCORE = 200
UNDERWRITING		
<i>AHFC Leverage</i>	22%	% of total project cost funded through AHFC request
Leverage Score	18	3 points per 5% reduction in leverage below 50% (max 30)
<i>AHFC Per Unit Subsidy (including prior amounts)</i>	\$77,634	Amount of assistance per unit
Subsidy per unit score	15	(\$200,000 - per unit subsidy)*25/\$200,000
<i>AHFC Per Bedroom Subsidy</i>	\$29,113	Amount of assistance per bedroom
Subsidy per Bedroom Score	21	(\$200,000 - per bedroom subsidy)*25/\$200,000
<i>Debt Coverage Ratio (Year 5)</i>	0.00	Measured at the 5 Year mark
Debt Coverage Ratio Score	0	Minimum = 1.0; Maximum = 1.5; 1.25 = best score
Underwriting Score	55	MAXIMUM SCORE = 100
APPLICANT		
FINAL QUANTITATIVE SCORE	85	THRESHOLD SCORE = 50
<i>Previous Developments</i>		
<i>Compliance Score</i>		
<i>Proposal</i>		
<i>Supportive Services</i>		
<i>Development Team</i>		
<i>Management Team</i>		
<i>Notes</i>		



Application for OHDA Funding – 2023

Tab 1 – Entity Information



Application for OHDA Funding – 2023

Tab 1a – Developer Experience

AUSTIN HABITAT FOR HUMANITY

APPLICATION FOR OWNERSHIP HOUSING DEVELOPMENT ASSISTANCE (OHDA) - 2023

DEVELOPER EXPERIENCE

Austin Habitat for Humanity has been developing and constructing affordable homes in Austin and Central Texas for nearly 40 years, and we have become experts in creating affordable homes and ensuring that these homes are sold to families who will succeed as homeowners. We have now built 525 homes as a nonprofit builder, and we have developed more than 20 properties into affordable housing communities. We have also provided access to nearly 500 additional affordable homes through our work with private developers who wish to offer affordable housing but do not have the infrastructure to deliver qualification services, financial counseling and education, and connections to affordable lenders. These partnerships, and our expansion into innovative multifamily building models, should allow us to provide access to at least 500 additional affordable homes in the next five years.

In addition to developing high-quality, energy-efficient affordable homes for purchase by our families, we operate as a real estate corporation focused on acquiring land and maximizing the affordable housing potential as local land gets more expensive. For example, the Montopolis Townhomes development discussed below is an efficient use of a parcel of land of less than .70 acre, owned by Austin Habitat since 1999, that will be developed into 12 homes of two, three and four bedrooms.

We also operate a retail business, including our flagship Ben White ReStore which has been the top-grossing store in the U.S. for the past five years, as well as our North Austin and San Marcos locations. These ReStores provide discounted appliances, furniture, and home improvement goods to the community; support the environment by allowing us to divert millions of pounds of reusable materials from landfills; and generate revenue to support our operations, helping us use donated funds to support direct service to families.

We also handle qualification and lending for the families we serve. All families who become Habitat homeowners must complete an extensive series of prequalification activities, including financial education and ongoing one-on-one homeownership counseling. In addition, each family performs sweat equity, first helping to build their neighbors' homes and then their own home, and they also contribute financially to ensure strong buy-in and commitment. When these activities are complete and the home has received its Certificate of Occupancy, each family receives an affordable mortgage that helps them succeed as homeowners and build assets for education, health care, and ongoing success. Our sales prices are designed to remain affordable to families that earn up to 80% of the median family income for the area, and our lending partners provide below-market rates.

Our primary model for producing quality homes for low-to-moderate income local residents is through sponsorships connected to volunteer opportunities. Our sponsors – community-minded local corporations, church congregations and other faith groups, service clubs, and many more – provide a double benefit by contributing financially and providing volunteers to our build sites. Austin Habitat must raise at least \$100,000 per home through this model, and the current cost of building one single-family Austin Habitat home is now nearly \$190,000. We seek donations of \$5,000 for one build day all the way up to \$100,000 for an exclusive sponsorship, providing a unique and meaningful way for the community to support our families. The volunteer model is

also vital to our continued success as the cost of materials, land and labor continue to increase in the Austin area; without this significant contribution of labor from the community, valued at more than \$1.5 million in 2022, we would not be able to offer the homes for sale at prices that are manageable for our partner families.

As Austin Habitat continues to grow, the team looks to expand the number and type of homes we can provide, through the development of ambitious new projects including multifamily housing. Austin Habitat has a strong team – including real estate, architecture, construction, planning, fund development, communications, client service and engagement professionals – which ensures that each project is undertaken with compassion, a strong focus on quality, and an ongoing commitment to compliance with all requirements. We have worked extensively with the City of Austin and numerous other public and private stakeholders to support our home builds and other programs, and we are committed to growing our supporter base.

Our HomeBase affiliate works with developers to continue adding affordable units to communities throughout Central Texas, and has incorporated an in-house real estate brokerage to assist in the provision of housing services to hardworking lower-income families. We are also expanding into larger partnerships that will eventually provide several hundred additional homes across the region, including developments in and outside of Austin.

Austin Habitat for Humanity has been led for the past seven years by Phyllis Snodgrass, whose strong background in business, accounting and nonprofit work led to rapid growth for the organization and several awards for her leadership, including the Austin Business Journal Best Nonprofit CEO award and the Vision Award from the Austin chapter of the Urban Land Institute. The organization will transition to a new leader on February 1, 2023, when Michele Anderson takes over as CEO. Michele served the United Way of South Hampton Roads, Virginia, for more than 30 years, ending as CEO of this large United Way affiliate and presiding over years of growth. She was hired after a national search by a professional search firm and members of our Board of Directors, focused on finding a new chief executive with experience as a corporate leader of an established but growing organization.

Please see below for a description of our expertise managing all aspects of an affordable housing development project. In addition, we have provided all required attachments: IRS tax-exempt statement; certified financial audit (2021); and Board approval for the project and the request for continued funding from the City.

- i. Project Management: With 525 affordable homes constructed, Austin Habitat for Humanity brings 38 years of project management experience and institutional knowledge about the most efficient and effective ways of creating affordable housing for hardworking families in Central Texas. Collectively, our staff brings experience that includes all phases of housing development including site acquisition, land development, design, and construction as well as marketing/outreach, finance, and other required areas.
- ii. Market Analysis: With a focus toward affordable housing, our staff has experience in identifying housing demand and capacity for low-to-moderate income working families (those earning up to 80% of the Median Family Income for the area). The team reviews information researched and published by the City, demographic from the U.S. Census and other sources, as well as information from other nonprofits and organizations dedicated to affordable housing. Austin Habitat has an established, detailed intake process for prospective families to enter our program. Many have been qualified through our housing counseling and have gone through underwriting

to determine their ability to pay a mortgage, and remain on a waiting list. Please see attached market review.

- iii. Site Selection and Control: Over the years, Austin Habitat has acquired finished lots and raw land that were developed for housing, including in the Montopolis area. Our organization owns the property described as follows. Please also see attached maps and warranty deed.

Lot 27, Block A, Vice Mary Estates

- iv. Planning and Construction: Austin Habitat has experience with the City's Land Development Code, and has the capacity to navigate a housing development project through the entitlement and permitting process, having successfully completed many affordable home development projects within the City of Austin. We are a leading advocate for modernization of the City's land development and zoning rules, and have worked in partnership with the City's team to ensure that any code changes support the loosening of restrictions that have kept the affordable housing stock low in Austin. Our advocacy has already led to a partial zoning modernization through Affordability Unlocked and VMU2, as well as other zoning and land use updates designed to encourage affordable homebuilding in the City. Our organization also employs an in-house architect and a construction team of full-time experienced construction personnel to oversee and complete home construction with volunteers and coordinate contractors and tradespeople.
- v. Design, Architecture and Engineering: Austin Habitat for Humanity's approach to housing development begins with acquisition of finished vacant residential ready-to-build lots; we have experience developing subdivisions and we retain the services of engineering firms to assist us with design, as well as employing two in-house architects. Austin Habitat and partners are experienced at designing home types including single-family detached homes, connected townhomes/condominiums, and other property structures to support a variety of family units, and we continue to expand our multifamily building models to support more families in need.

Our team has managed numerous projects in partnership with architectural and engineering teams over the past 38 years, and we continue to work with the highest-quality teams, including those who have built innovative structures around the world, and recipients of numerous design awards.

- vi. Legal and Accounting: Austin Habitat employs the services of legal counsel as needed and has two attorneys on the Board of Directors. We have an in-house accounting team to work on daily finances including construction spending, and we employ an outside accounting firm to perform an independent annual audit that reflects the overall financial position of the organization.
- vii. Federal Funding Rules and Other Funding Rules: Austin Habitat's team has successfully administered multiple federal awards through CDBG, HOME, SHOP and NSP. We also receive certification and funding from HUD for our Housing Counseling program, as well as administering grants from USDA Rural Development for Home Repair. Multiple staff members have significant federal program and contract administration experience, and all Austin Habitat projects are performed in accordance with the *Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards*, 2 C.F.R. §200 et seq. as well as any state and

local statutes and regulations. Austin Habitat also receives support from the State of Texas and several municipalities, including the City of Austin.

viii. **Awards and Competitive Funding:** Austin Habitat for Humanity has a nearly-year history of attracting competitive funds including government grants, foundation and corporate support, and individual donations. We have been fortunate to receive significant support from the City of Austin for a number of our projects, including current support for our Mueller, Scenic Point, and Persimmon developments as well as previous support for the earlier stages of the Montopolis development. We are also currently supported by other government entities for several projects, including the U.S. Department of Housing and Urban Development (HUD), the U.S. Department of Agriculture (USDA), the State of Texas, the City of Bastrop, and the City of San Marcos. Corporate supporters include Bank of America, Wells Fargo, SailPoint, The Home Depot Foundation, Realty Austin, NI, University Federal Credit Union, Cisco and 3M. Among private foundations, we receive support from the Austin Community Foundation, the Montandon Charitable Trust, The Burdine Johnson Foundation, Reissa Foundation, the Lola Wright Foundation, the Donald D. Hammill Foundation and a number of other private supporters. We also raise more than \$1 million annually through special events and individual contributions, evidencing our strong community recognition and reputation for excellent service. We have won several awards in recent years including Green Builder of the Year from Austin Business Journal and Nonprofit of the Year from the Greater Austin Chamber of Commerce.

Recent and ongoing projects include the following:

Address	Number of Units	New or Rehab	Type of Property	Year Completed
Devonshire Village	43	New	Single Fam.	2013
Meadow Lake	25	New	Single Fam.	2011
Sendero Hills	49	New	Single Fam.	2013
Gilbert Lane	31	New	Single Fam.	2015
Lee Meadows	11	New	Single Fam.	2016
Magin Meadow	16	New	Single Fam.	2017
Guadalupe-Saldaña	4	New	Single Fam.	2018
Mueller	11	New	Multifamily	Ongoing
Scenic Point	67	New	Single Fam.	Ongoing
Persimmon	126	New	Multifamily	Ongoing
Montopolis/Círculo de Amistad	12	New	Multifamily	Ongoing

DEVELOPMENT TEAM

	Development Team Name(s) and Contact Information	MBE? (Mark X if Yes)	WBE? (Mark X if Yes)	Non-profit? (Mark X if yes)
Owner	Austin Habitat for Humanity, Inc.			X
Developer	Austin Habitat for Humanity, Inc.			X
Architect	Forge Craft			
Engineer	Thompson Land Engineering			
Structural Eng.	Structures	X	X	
Other Lenders	None			
Attorney	Husch Blackwell			
Accountant	PMB Helin Donovan, LLP			
General Contractor	Austin Habitat for Humanity, Inc.			X
Consultant (if Applicable)	N/A			



Application for OHDA Funding – 2023

Tab 1b – Certificate of Status



As of : 12/22/2022 14:44:13

This page is valid for most business transactions but is not sufficient for filings with the **Secretary of State**

[Obtain a certification](#) for filings with the Secretary of State.

AUSTIN HABITAT FOR HUMANITY, INC.**Texas Taxpayer Number** 17423732175**Mailing Address** 500 W BEN WHITE BLVD AUSTIN, TX
78704-7030**? Right to Transact Business in Texas** ACTIVE**State of Formation** TX**Effective SOS Registration Date** 01/23/1985**Texas SOS File Number** 0073651401**Registered Agent Name** PHYLLIS A SNODGRASS**Registered Office Street Address** 500 W BEN WHITE BLVD AUSTIN, TX
78704



Application for OHDA Funding – 2023

Tab 1c – Statement of Confidence

Please note that Austin Habitat for Humanity has been working with the City of Austin for more than 20 years. Therefore, we have not submitted a statement of confidence from other jurisdictions.



Application for OHDA Funding – 2023

Tab 2 – Principals Information



Application for OHDA Funding – 2023

Tab 2a – Resumes of Principals

Phyllis Snodgrass

3816 S Lamar Blvd. Apt. 1203 • Austin, TX 78704 • (512) 757-5715 • psnodgrass@ahfh.org

SUMMARY

Innovative executive with 20+ years in non-profit management. Strong strategic thinker and team builder with a history of building winning programs with strong community support.

AREAS OF EXPERTISE

- Community Collaborations • New Product Development • Fundraising • Strategic Planning
- Event Management • Market Analysis • Board Governance • Leadership Development
- Budgeting • Affordable Housing • Public Speaking • Goal Alignment

EXPERIENCE

Austin Habitat for Humanity - CEO, Austin, TX November 2015 – Present

Direct all aspects of Austin Habitat for Humanity's affordable homeownership programs, including new construction, home repair, housing counseling, and community development, neighborhood revitalization initiatives, affordable housing advocacy and income qualification services and ReStore retail operations.

Support and report to the Board of Directors, investors, donors, public entities, and community stakeholders.

Ensure adequate funding, staffing, and program planning for all divisions.

Manage staff of 80+ FTEs with an \$10 million annual budget.

Austin Chamber of Commerce - COO, Austin, TX January 2013 – October 2015

SVP - Member Relations September 2011 - January 2013

Led Membership, Small Business, Special Events & Partnerships and Marketing Communications Departments

Reorganized Membership Sales Program, exceeding organizational sales goals 2012- 2014

Introduced new affinity programs to Chambers members providing non dues revenue for organization plus cost savings to member businesses

Organized 3 volunteer membership campaigns in 3 years, Spring 2015 Campaign brought in \$180,457 and 283 new members with 285 volunteers in 2 1/2 days (one of the top membership campaigns in the U.S.)

Implemented internal messaging strategy for staff and volunteers in 2014

Grew Austin Chamber LinkedIn Group from 300 members in 2011 to over 5000 members (followers) in 2015

Created new programs and strategies to meet member needs

Texas Association of Business - VP - Chamber Relations; Austin, TX September 2010 - September 2011

Managed the operations of the Texas Chamber of Commerce Executives (TCCE) and serving as a primary contact with Texas Chambers of Commerce for TAB

Increased income for TCCE by 36% in one year

Enhanced social media presence of TCCE and connections to its member chambers throughout the state

Facilitated Chamber Board retreats across the state of Texas

Developed affinity program review and approval policies for TCCE

Successfully managed first association audit for TCCE in its history

Planned and executed first 5 year strategic planning effort for TCCE

San Marcos Area Chamber of Commerce - *President*; San Marcos, TX January 2007 - September 2010

Managed San Marcos Chamber operations as well as contractor with City of San Marcos for Economic Development and Convention and Visitor Bureau Programs

Suggested new programs and strategies for increasing income by 30% in first two years

Completely revamped economic development program, creating the Greater San Marcos Partnership (GSMP)- a regional economic development public-private organization in Hays and Caldwell Counties.

Grew GSMP budget from \$300,000 to over \$2MM with a campaign focused on economic diversification, workforce excellence and quality of place. In its first year, GSMP received the International Business Retention and Expansion Award and was recognized Economic Development Program of the Year by the Texas Chamber of Commerce Executives

Founded SOAR (Seeking Opportunities, Achieving Results), a P-16 collaborative effort of the San Marcos Chamber, Texas State University, San Marcos Independent School District and the City of San Marcos. Established the Chamber as a leader in economic development, tourism, educational attainment and community development

Victoria Chamber of Commerce - *President/CEO*; Victoria, TX May 2001 - December 2007

Managed Chamber Operations and contracted with the City of Victoria for Convention and Visitor Bureau Program

Increased membership from 850-1100 sustained members

Merged Victoria Chamber of Commerce with the Victoria Hispanic Chamber of Commerce

Grew size and stature of Leadership Victoria Program in the community, making it the go-to source for leadership training for area executives

Founded Keep Victoria Beautiful Program as a program of the Victoria Chamber in partnership with the City of Victoria

Suggested additional programs and strategies, increasing income by 50% in 4 years

Successfully established the Victoria Chamber as a leader in innovation, growth strategies, leadership development, community development, business representation and educational accountability

Athens Chamber of Commerce - *Executive Director*; Athens, TX 1998 - 2001

Managed Chamber Operations and contracted with the City of Athens for Visitor Services Support

Increased membership from 350 to 800 sustained members

Suggested new programs and strategies, increasing income by 40% in 3 years

Worked with volunteers to enhance existing programs and infrastructure, increasing professionalism and financial success of each program

Small Business Development Center - *Counselor*; Athens, TX 1997 - 1998

Counseled numerous small and start-up businesses

Assisted with SBA loan proposals and business plans for small businesses

Successfully assisted target Welfare to Work client, filmed as a national success story for PBS on SBA's Welfare to Work Program in 1998.

Phyllis A. Hunt, CPA - *Accountant*; Athens, TX 1997 - 1998

Provided tax and business advice for start-up, small and mid-sized businesses

Federal Deposit Insurance Corporation - Accounting Specialist; Dallas, TX 1989 - 1997

Managed contract firms hired to review Southwest Plan quarterly payment requests and approved payment request for six Southwest Plan Institutions
Named to FDIC National Performance Standards Task Force in 1994

Redwood Property Company - Controller; Dallas, TX 1987 - 1989

Provide accounting services and management advice for start-up real estate development company
Assisted in successful negotiations and subsequent sale to Koll Company

Kenneth Leventhal & Company (Later merged with Ernst & Young) - Senior Accountant; Dallas, TX 1984 - 1987

Auditor for international real estate accounting firm headquartered in Los Angeles
Performed management consulting services including loan workouts in 1986 and 1987
Obtained CPA certification, May 1987

EDUCATION

The University of Texas at Arlington Bachelor of Business Administration May 1984
Major: Accounting, Minor: Management
Institute for Organization Management Certificate in Non Profit Management July 2004
Georgetown University McDonough School of Business, New Strategies Program, September 2016

PROFESSIONAL AFFILIATIONS

Enactus Advisory Board, Texas State University
US Council, Habitat for Humanity International
Member, Austin Area Research Council
Member, Women's Housing Leadership Group
Certified Chamber Executive, Association of Chamber of Commerce Executives

Michele Anderson

4824 Lake Bradford Lane, Virginia Beach, VA 23455 | manderson@unitedwayshr.org | (757) 724-9354

Professional Experience

United Way of South Hampton Roads, Norfolk, VA

President and CEO | 2019- Present

Responsible for the daily operations and implementation of the strategic plan of the United Way of South Hampton Roads. Duties include: board and volunteer development; aligning and positioning United Way for planned growth and change; oversight of all aspects of the organization, including development of the strategic plan, generating financial resources, managing investor relations; budget preparation and implementation; planning for and tracking community issues; allocation of funds to best respond to community needs; and development of integrated community collaborations.

Chief Development Officer | 2015 -2019

Responsible for leading the revenue generation department through annual campaigns, major and planned giving. Also managing the marketing department which is responsible for branding and positioning of United Way and serving as a bridge between resource development and community teams. Serving as lead executive for the Foundation and its Trustees which currently has over \$20 million in assets. Collaborating with all departments, including finance and community impact to deliver strategic partnerships and necessary revenue. History of service as lead executive in absence of CEO. Participated in the last two strategic plans which dramatically changed our vision to include creating United for Children and Mission United.

Accomplishments include:

- Implemented our first endowment campaign with a goal of \$35 million, completed of \$42 million raised to date.
- Created a new three-year strategic plan in 2022 which included 100 community conversations with over 700 individuals.
- Create a new focus area on Economic mobility and secured a 15 million grant to launch.
- Cultivated and secured the two largest gifts in our history (\$10 million), with eleven additional \$1 million gifts.
- Developed and implemented an aggressive strategic plan to more than double the UWSHR Foundation from \$8 million to \$50 million by 2022 with a strategic focus on deepening UWSHR's programmatic impact and leveraging key partnerships.
- In partnership with volunteer leadership, motivated major investors to align with UWSHR's vision for growth to bring systemic, impactful change to our model and our future.
- Recruited high level board and trustee members.

- Led the growth in the Tocqueville Society to more than 200 members raising \$3.4 million annually. Ranked #1 in Virginia and has one of the highest retention rates in the country (96%). The Society has doubled in membership and tripled in dollars over the last 10 years.

Vice President, Major and Principal Gifts | 2010 – 2015

Responsible for the development and implementation of the major gifts program and the planned giving program for the organization’s foundation. Provided high-level volunteer management and development. Analyzed and developed strategies for planned giving, and major gifts, Women’s, Young Leaders and African American Societies. Created a team in major gifts with various demographic groups: Women’s Leadership Council (900+ women giving individual gifts of \$1,000+ for a total of nearly \$2 million annually), Young Leaders Society (500 members raising more than \$500,000 annually) and African American Leadership Society (200 members raising nearly \$300,000 annually).

Director of Major Gifts | 1998 – 2010

Developed strategies to increase and retain members in the major gifts program. Worked directly with CEOs and executives to increase membership and giving levels. Created and expanded the prospect database from 85 to over 1,000 potential members. Implemented new programs to retain and grow the membership, such as the CEO/Community Leaders luncheons and annual dinner in member homes. Launched the Women’s Leadership Council in 2002 and started the Women’s Leadership Council Endowment Fund in 2004. In the first year of expansion, began with a challenge match of \$100,000, secured over 400 donating members, and coordinated the first Women’s Leadership Luncheon (more than 650 members and prospects in attendance). Co-chaired a team that developed the Young Leaders Society in 1999 with the purpose to grow our next generation of donors and volunteers.

Assistant Vice President of Resource Development | 1997 – 1998

Planned, developed, supervised and analyzed resources in a five-city area: Norfolk, Virginia Beach, Chesapeake, Portsmouth and Suffolk. Managed a full-time and seasonal staff of 23.

Education & Training

- B. A., Old Dominion University, Norfolk, VA
- Executive Board Member Hampton Roads Chamber of Commerce
- Selected as one of the 65 Power list in Hampton Roads in 2021 and 2022
- Advanced Leadership Program-One of 18 members from around the globe chosen by United Way World Wide to participate in the Advanced Leadership Program which develops the next generation of CEO’s.
- National Major and Planned Giving Council- One of 25 members across the US and Canada responsible for developing strategy for the United Way’s system.
- Presenter at National WWW conference with topics such as Product Development and Creating Planned Giving programs.

RICARDO ANDRÉS (ANDY) ALARCÓN, AICP

5200 HARTSON . KYLE, TEXAS 78640 . 512-406-1535 . andyalarcon@hotmail.com

SUMMARY OF QUALIFICATIONS

- Land Development: Entitlements, Project Management
- Land Studies: Due Diligence, Site Evaluation, Concept Plans, Surveys
- Land Acquisition: Real Estate Contracts, Title Reports, Appraisals, ESAs, Closing Coordination
- Entitlements: Land Use, Zoning, Annexations, Site Plan Review, Subdivision Plats
- Permitting: Applications, Coordination, Map Exhibits, Support Documents, Building Plan Review
- Project Coordination: Government, Consultants, Contractors
- Urban Planning: Community Plans, Downtown Master Plan, Citywide Rezoning, Vision Plans
- Design: Architectural Design, Construction Plans, Urban Design, Land/Site Planning
- Administration: Project Budget Oversight, Land Inventory, Appraisal District Exemptions
- Interface with Boards/Commissions, Government Staff, Consultants, General Public

EDUCATION

- **Master of Architecture**, The University of Texas at San Antonio, May 2011
UTSA Architecture Study Abroad, Barcelona, Spain, Spring 2010
- **Master of Urban Planning**, University of Illinois at Urbana-Champaign, May 1995
- **Bachelor of Business Administration- Finance**, The University of Texas-Pan American, Dec 1991

PROFESSIONAL EXPERIENCE

- **Director of Real Estate Development**, Austin Habitat for Humanity, Feb 21, 2012-Present
- **Chief Planner**, City of San Marcos, Planning and Development Department, Dec 13, 2004-May 2008
- **Program Officer**, Local Initiatives Support Corporation, Houston, Texas, Feb 19, 2002-Nov 17, 2004
- **Principal Planner**, City of Houston Planning & Development, Aug 31, 1998-Feb 8, 2002
- **Planner IV**, City of Austin Planning & Environmental Services, Jun 1997-Aug 1998
- **Regional Coordinator/Planner**, Texas Dept of Housing & Com Affairs, Austin, Texas, Aug 1995-May 1997
- **Program Coordinator**, County of Hidalgo Urban County Program, Edinburg, Texas, Jul 1992-Aug 1993
- **Civil Engineering Technician**, S. A. Garza Engineers, Inc., Edinburg, Texas Jan 1988-Jul 1992
- **Civil Engineering Technician**, Espey, Huston & Associates, Inc., Austin, Texas, Aug 1984-Jun 1987

CERTIFICATIONS AND LICENSES

- American Institute of Certified Planners (AICP)
- Texas Real Estate Broker
- Housing Development Finance Professional (HDFP) Certification, National Development Council
- OSHA 10-Hour Construction Training 2017

MEMBERSHIPS AND AFFILIATIONS

- American Planning Association (APA)
- National Council of Architectural Registration Boards-Intern Development Program (NCARB IDP)
- National Association of Realtors (NAR)
- Texas Association of Realtors (TAR)
- Austin Board of Realtors (ABOR)

Contact

wayne.gerami@gmail.com

www.linkedin.com/in/waynegerami
(LinkedIn)

Top Skills

Non-profits

Research

Online Research

Languages

English (Native or Bilingual)

Spanish (Limited Working)

Certifications

NMLS License 1436145

Wayne Gerami

Chief Program Officer at Austin Habitat for Humanity
Austin, Texas, United States

Summary

Affordable housing professional with experience in both program creation and expansion. Focused on the big picture while always trying to understand what could be and how best to get there. A fast learner who is more interested in being right going forward than having been right in the past. Unafraid to confront new challenges or to find ways to solve long-standing problems with novel solutions.

Specialties: Affordable housing, leadership & management, project planning, program evaluation, research, mortgages, long-term affordability, community land trusts, deed restrictions, property taxes.

NMLS #1436145

Experience

Austin Habitat for Humanity

9 years 1 month

Chief Program Officer

March 2020 - Present (2 years 6 months)

Austin, Texas Area

Vice President of Client Services

November 2015 - March 2020 (4 years 5 months)

Austin, TX

NMLS #1436145

Responsible for 3 separate client-side programs: AHFH Homeownership, AHFH Housing Counseling, and HomeBase Texas. Collectively these departments have 8 FTE and serve families through pre-purchase education & counseling, program intake, income verification, credit assistance, mortgage underwriting, foreclosure prevention, and post-purchase support.

Implemented first-of-their-kind-in-Texas fixed appreciation mechanisms to ensure long-term affordability of the units we create in order to better serve the

community. Work closely with community partners to maximize the affordability of our units and ensure compliance with all relevant regulations and funding source restrictions.

Government Grants Manager

May 2015 - November 2015 (7 months)

Austin, TX

Managed a large and diverse portfolio of government grants and funding sources, including applications/awards, compliance, and close-out.

Community Engagement Manager

February 2015 - November 2015 (10 months)

Austin, Texas Area

Engagement and outreach work with family and community partners. Focus on Neighborhood Revitalization, program measurement & improvement, new community partnerships, and new program development.

Lending Coordinator

August 2013 - February 2015 (1 year 7 months)

Austin, TX

Work closely with families to help them through the mortgage process for AHFH and HomeBase. Participate in the underwriting process on the lending side. Program development including delinquency processing, home pricing, lien structuring, Community Land Trust (CLT) modeling, and policy implementation.

Evolve Austin

Board of Directors

May 2017 - February 2021 (3 years 10 months)

Austin, TX

Austin Christian Church

Director

2014 - February 2021 (7 years)

Member of the Board of Directors.

DMA Development Company, LLC

Project Coordinator

January 2012 - August 2013 (1 year 8 months)

Austin, TX

LIHTC/202/811 development and consulting.

Greater Austin Chamber of Commerce
Public Policy Research Assistant
August 2010 - May 2011 (10 months)

Assist in public policy research, event coordination, social media development, and similar tasks.

HOPE worldwide
Gulf Coast Site Supervisor
June 2010 - August 2010 (3 months)

Manage 8 AmeriCorp volunteers and build curriculum for a summer-long day camp for 5-12 year olds. Responsible for an additional 26-person volunteer group that was in town for two weeks. Handle all administrative tasks.

Austin Habitat for Humanity
Program Assistant (ABWK AmeriCorps)
August 2007 - July 2009 (2 years)

Planned and Executed home repair projects for low-income families.
Managed and trained 5-30 volunteers multiple times per week on construction sites.

Assisted the Family Selection Committee with homeowner selection.
Involved in policy making for the A Brush With Kindness (home repair) program that AHFH created in 2005.

Represented AHFH and ABWK at off-site events and fundraisers.
Green building and remodeling

First American Mortgage Corporation
Sales Representative / Assistant Manager
June 2005 - June 2007 (2 years 1 month)
Framingham, MA

Cold contacted potential customers.
Responsible for understanding mortgages and the financing process.
Trained new employees.
In a two-week time frame sold as much as \$1.8 million in mortgage refinancing.

Allied Mortgage Capital Corporation, LLC
Sales Representative
April 2002 - July 2004 (2 years 4 months)
Milford, MA

Unscripted cold-contact sales of mortgage refinancing. Trained new employees on sales and service techniques.

Education

The University of Texas at Austin

M. P. Aff., Public Affairs; Nonprofit Management · (2009 - 2011)

Carleton University

· (2010 - 2010)

Framingham State University

BA, Psychology · (2004 - 2007)

Milford High School

University of Massachusetts, Amherst

BA Psychology

Contact

www.linkedin.com/in/silvio-cruz-74193789 (LinkedIn)

Top Skills

FHA

Loans

Referrals

Languages

Spanish

Silvio Cruz

Mortgage Lending Supervisor
Austin, Texas, United States

Experience

Regions Bank

Mortgage Loan Originator

May 2014 - December 2015 (1 year 8 months)

Downtown Austin

I help people get financing for the purchase/refinancing of a home. Regions Bank offers portfolio products such as 0% down payment on doctor loans and your regular Conventional, FHA, VA and Jumbo Loans.

Bank of America

Mortgage Loan Originator

January 2013 - May 2014 (1 year 5 months)

Mortgage Loan Originator, FHA, VA, Conv, Jumbo.

A Plus Federal Credit Union

Mortgage Loan Officer

September 2010 - January 2013 (2 years 5 months)

Mortgage loan originator, Conventional, FHA, VA. Portfolio Loans.

Wells Fargo

Personal Banker

July 2007 - September 2010 (3 years 3 months)

Open personal and business checking, savings account, Personal and business loan, referrals to mortgage, investment, insurance of all types.

Education

Seward County Community College, Kansas

General Studies, Business Administration, Management and Operations · (2002 - 2006)

Contact

bertie415@gmail.com

www.linkedin.com/in/bertie-flores-samilpa-b2887066 (LinkedIn)

Top Skills

First Time Home Buyers

Certified Housing Counselor

Credit Counseling

Certifications

Certified Housing Counselor

Bertie Flores-Samilpa

Housing Counselor at Austin Habitat for Humanity
Austin, Texas Metropolitan Area

Experience

Austin Habitat for Humanity

Housing Counselor

December 2015 - Present (6 years 9 months)

AmeriPro Home Loans

Loan Processor

September 2015 - December 2015 (4 months)

Southwest Bank Mortgage

Loan Processor

May 2014 - December 2014 (8 months)

Security National Mortgage

Loan Processor

May 2012 - April 2014 (2 years)

Frameworks CDC

Sr Counselor

March 2009 - April 2012 (3 years 2 months)

CLAIRE M. U. WALPOLE

704 West Oltorf Street ◦ Austin, TX 78704 ◦ 512-638-3601 ◦ cmuwalpole@gmail.com ◦ cmuwalpole.com

WORK EXPERIENCE

October 2013 – present Austin Habitat for Humanity, Austin, TX
Staff Architect, Design for Special Projects, Permit Procurement, Construction Management, Converting office to Revit

April 2007 – May 2008, November 2012 – Present Claire Marie U. Walpole, RA, Austin, TX
Self-Employed: Commercial Finish-out, Residential New Construction, Residential Renovation

May 2008 – Feb 2012 BLGY, Inc., Austin, TX
Project Management, Project Architect, Design, Production: City of Austin Public Safety Training Facility, Round Rock Elementary Schools, Teague Jr/Sr. High Auditorium and Black Box

June 2005 – January 2007 CG&S Design-Build, Austin, TX
Project Architect, Project Designer, Specifications Writer, Office Process Organization

April 2003 – April 2005 Hanbury Evans Wright Vlattas + Co., Norfolk, VA
Design; Historic Preservation; Project Development; In-house Education Programs

January 2002 – March 2003 MMM Design Group, Norfolk, VA
Discipline Coordination, Cost Estimating, Field Work, Construction Documents

EDUCATION

1997 – 2001 Louisiana State University Baton Rouge, LA
Bachelor of Architecture, May 2001

1995 - 1997 University of Southern Mississippi Hattiesburg, MS
Honors College

CERTIFICATIONS, SKILLS, HONORS AND ACTIVITIES

Licensed Architect, Texas License Number 19903, Dec 2006

LEED Accredited Professional, May 2005

AutoDesk AutoCad and Revit, Adobe Creative Suite (Photoshop and Illustrator), Sketchup

BLGY 2010 Robert P. Landes Architecture Award

LSU Chancellor's Design Competition, First Place

AIA Austin, 2011 Honor Awards Committee

AIA Austin, Architecture in Elementary Schools program: 2007, 2008, 2011, 2012, 2013, 2014

AIA Hampton Roads, Director of Communication, Newsletter Editor

American Institute of Architecture Students, LSU Chapter President

All Saints Presbyterian Church, Building Executive Committee, Architect Search Committee

Lighting and Sound Director, *Birth: a Play* by Karen Brody, 2008

Austin Civic Chorus, 2006-2014

Conspirare Symphonic Chorus, 2010-2013

BILLY WHIPPLE

9614 Chukar Cir. Austin, TX 78758 – Whipple3@gmail.com – (603) 866-0899

SKILLS SUMMARY

- ❖ Construction Management
- ❖ High Attention to Detail
- ❖ Contract Negotiation
- ❖ Bidding, Estimating, & Proposals
- ❖ Site Safety/ OSHA Compliance
- ❖ Budgeting & Cost Controls
- ❖ Microsoft Office Suite
- ❖ Material Management
- ❖ Energy Star

PROFESSIONAL EXPERIENCE

AUSTIN HABITAT FOR HUMANITY – AUSTIN, TX **Vice President of Construction, 2016 to Present**

- ◆ Provide leadership to Home Repair, New Construction, & the Warehouse.
- ◆ Collaborate with Senior Leadership to develop cohesive strategies to achieve Habitat's mission.
- ◆ Generate build schedules from an annual overview down to day-to-day actions.
- ◆ Operational management of construction warehouse facility and truck fleet.
- ◆ Oversee all aspects of post-land development construction process.

HABITAT FOR HUMANITY WILLIAMSON-MAURY – FRANKLIN, TN **Director of Construction, 2014 to 2015**

- ◆ Manage staff, contractors, and volunteers to the completion 12 homes annually.
 - ◆ Generate build schedules from an annual overview down to day-to-day actions.
 - ◆ Maintain high quality building standards and hold contractors to the same standards.
 - ◆ Finish projects on time while meeting municipal codes and Energy Star standards.
 - ◆ Manage a \$1.1 million departmental budget.
 - ◆ Develop accurate budgets for all projects.
 - ◆ Work closely with clients to ensure they are happy and well informed during projects.
 - ◆ Solicit, review, and award project bids.
 - ◆ Consistently update vendor and sub-contractor data base
 - ◆ Research and negotiate prices on building materials.
-

BILLY WHIPPLE

9614 Chukar Cir. Austin, TX 78758 – Whipple3@gmail.com – (603) 866-0899

PROFESSIONAL EXPERIENCE CONTINUED

HABITAT FOR HUMANITY WILLIAMSON-MAURY – FRANKLIN, TN

Community Outreach Manager & Volunteer Coordinator, 2013 to 2014

- ◆ Build, maintain, & strengthen relationships with community groups & local businesses.
- ◆ Procure & manage gift-in-kind donations for programs and home builds.
- ◆ Communicate with stakeholders about the organization through social media, video, and e-mail marketing tools.
- ◆ Research & implement community focused fundraising campaigns.
- ◆ Schedule and track 3,000 volunteers per year.
- ◆ Collaborate with all departments to help the team meet and exceed their goals.
- ◆ Coordinate volunteers, meals, and building logistics for each volunteer build day.

AUSTIN HABITAT FOR HUMANITY– Austin, TX

Project Manager, 2010 to 2013

- ◆ Manage logistics of 23 new single-family residential homes per year.
- ◆ Hire and train staff to become functional home builders and leaders.
- ◆ Delegated day-to-day build site responsibilities.
- ◆ Responsible for meeting all city, green building and third-party inspections.
- ◆ Created a new build schedule that increased efficiency by 25%.

AMERICORPS, AHFH – Austin, TX

Construction Crew Leader, 2009 to 2010

- ◆ Served over 1700 volunteer hours.
- ◆ Strengthened my construction skills and construction communication
- ◆ Lead and trained groups of volunteers on the construction site.
- ◆ Performed daily job site quality and safety inspections.
- ◆ Kept inventory and delivered building materials.
- ◆ Attended leadership and professional development seminars.

EDUCATION & TRAINING

GRANITE STATE COLLEGE- CONCORD, NH

Bachelor of Science in Business Management, 2012

UL OSHA 10-HOUR CERTIFICATION

AMERICAN HEART ASSOCIATION

Heartsaver CPR & AED Certified



Application for OHDA Funding – 2023

Tab 2b – Resumes of Development Team

About



BLAND CONSTRUCTION: 1957 - 1989

Beginning in 1957, Thurston Joseph Bland and his two brothers began constructing underground utilities throughout Central Texas. Joe Bland began working summers for the company in 1965. In 1972 after a semester at the University of Texas started working full time as a project manager. By 1979 Joe Bland became the President & CEO, a position he held for a decade until he closed Bland Construction Company in 1989.

For the next seven years, Joe continued to work in the construction industry, furthering his knowledge of both construction and business management. In 1996, he along with two trusted partners formed Bland/Schroeder/Archer and built a successful company providing general contracting services in Central Texas. Finally, in 2003, Joe became the President & CEO of what is now Joe Bland Construction.



JOE BLAND CONSTRUCTION, L.P.: 1996 - PRESENT

Joe Bland Construction has been operating in Central Texas for just over 20 years. In those 20 years, we have been fortunate enough to retain many employees who have been with us since the beginning. These employees, along with the leadership of Joe, have been able to develop a reputation of integrity and commitment. Our reputation has allowed us to cultivate amazing relationships in our industry. As we approach our 800th completed project, we look back with thankfulness on the amazing success, and we look forward confidently to continue providing superior construction service to the communities in and around Central Texas.



o

In addition to private construction, we believe our continued success lies in further expansion into public construction and are currently actively bidding and procuring work from the State of Texas, the City of Austin and surrounding counties within a 100 mile radius of Austin.

We are convinced we enjoy a reputation as one of the best, if not the best, civil contractor in Central Texas and would encourage anyone to check with any of our clients or the governing agencies we have worked for to confirm this.

Team

SCOTT GINDER, founding principal, is proud to have spent 14 years of his career in the office of Dick Clark Architecture designing small and mid size commercial projects, multi-family, custom residential, affordable housing, restaurants, and retail space.

[resume](#)

ROMMEL SULIT, founding principal, brings large commercial building design experience to the Forge Craft. His experience has been formed while working in the offices of Rem Koolhaas Office of Metropolitan Architecture, Page Southerland Page, Rhode Partners, and Boka Powell. His work is concentrated on designing large commercial ground-up buildings.

[resume](#)

JON HAGAR earned his BFA (2001) from the University of Michigan and his M.Arch (2010) from Tulane University. Having worked in Austin, New Orleans, and St. Louis, he has experience in a broad range of projects with a focus in affordable housing and prefab modular office work. Jon's fine arts background imbues his design process with creative energy and he is particularly interested in expressing design intent through the careful execution of detail. In recent years his expertise has extended to volunteer work with the East MLK Neighborhood Plan Contact Team, Community Powered Workshop, and Preservation Austin.

TREY FARMER, AIA received his M.Arch from The University of Texas at Austin and has 10 years of experience in sustainable design and construction. He came to Austin from New Hampshire via New Zealand and Northern California where he worked and studied English, architecture, permaculture and natural building. He is a LEED AP (BD+C) and a Certified Passive House Consultant (CPHC) as well as a certified permaculture designer and teacher. Trey is on the Austin Passive House Alliance Board and the national Passive House Alliance Council. Trey has worked as a writer, bartender, job coach, teacher, carpenter, community organizer and orchardist. He spends his free time with his wife and fur-child on the greenbelt and in their garden.

CAREY ALCOTT received her M.Arch from the University of Virginia, and B.A.'s in Anthropology and Studio Art from the University of Texas at Austin. In the years between, she was a Peace Corps Volunteer in Botswana, lived and worked on organic farms in the Southwestern United States, and spent time building natural houses for a non-profit organization in Moab, Utah. She has recently returned to Austin to "settle down" and put her experiences and interest in sustainable design, construction, and community-building to use in her home state.

ALISON STEELE acquired her M.Arch from The University of Texas at Austin as well as a BFA with a concentration in photography from the University of North Carolina at Charlotte. She received a research grant from the AIA for *Innovation and Practice in Housing Design*, which exemplifies her passion for affordable housing and sustainable design. Alison enjoys wandering across new countries, including India, China, and Ecuador. On weekends she can be found alongside her husband and daughters, usually eating.

VALERIA LANDEROS received her B. Arch at the University of Texas at Austin (2018), and has since used her studies to pursue architecture with a priority on quality of life and detail oriented design. She's collaborated directly with low-income communities and non-profit organizations on public interest design projects and has worked on single-family and low-income housing in both rural and high-density cities throughout Texas. She utilizes local context and vernacular as inspiration and looks towards a variety of influences in furniture and textile design, art, and music to continually elevate her creativity.

JOSHUA LEGER, AIA received a BSD in Architectural Studies and BS in Sustainability from Arizona State University in 2014 and M.Arch from The University of Texas at Austin in 2017. He has worked on a wide variety of projects including

NATE JACKSON earned his B. Arch from California Polytechnic University at San Luis Obispo, with a concentration on sustainable technology in the built and natural environment. His portfolio includes work in supportive housing, climate adaptive design, and architecture for a microgravity environment. In his free time, he can be found enjoying the Austin cityscape or working on any varied and sundry crafts project.

ANDREA PEREZ HERNANDEZ received her B. Arch at the University of Texas at San Antonio (2020) as well as a certification in sculpture in the Michelangelo Institute of Florence in Italy. She came to Austin from New York City after freelancing several small architecture projects. She has also led several independent renovation projects in her hometown in Mexico. During her free time, you will find her biking across different countries and exploring diverse cultures while finding new ways to re-invent conventional spaces. Ultimately, she hopes to serve as a set of fresh eyes to the architecture industry.

PAST COLLABORATORS: Erica Quinones, Carrie Gammel, Jason Kerensky, Maria Valdez, David Goujon, Matthew Montry, Clayton Holmes

JOIN OUR TEAM!

FORGE CRAFT is an award-winning architecture and design firm based in the creative culture of Austin TX. We specialize in multi-family housing and creative mixed-use development with an emphasis on micro-unit design, affordable housing, performance and arts spaces, restaurant and bar, light industrial, creative office, tricky urban infill sites and custom luxury and spec modern homes. We are also a leading firm in prefabricated modular design and execution.

We are again looking to expand our creative core with inquisitive individuals armed with strong design skills, visual and verbal acumen, the capacity to make and follow through, and with the composure to work in a dynamic collaborative environment. With that in mind, we are fielding submissions for the following positions:

ARCHITECT/DESIGNER: The ideal candidate has 2-5 years work experience in an architecture firm; strong design skills, experience with construction administration, experience with construction drawings, a strong professional work ethic with a commitment to timeliness and “being present”; autonomous but willing to follow direction and absorb training from more experienced designers; able to ask the right questions in the right context; a propensity for working in teams and interest in contributing to the firm culture; willingness to adapt to and master Forge Craft’s design and work methodology. Facility in 3D BIM systems as well as 2D computer- and manual graphic media is preferred, though not required. Experience with ArchiCAD (our BIM platform), Sketchup and similar applications are pluses. Active participation in the community-at-large is also a big plus.

ARCHITECTURAL INTERN: The ideal candidate has 0-2 years work experience in an architecture firm; a strong professional work ethic with a commitment to timeliness and “being present”; autonomous but willing to follow direction and absorb training from more experienced designers; able to ask the right questions in the right context; a propensity for working in teams and interest in contributing to the firm culture; willingness to adapt to and master Forge Craft’s design and work methodology. Facility in 3D BIM systems as well as 2D computer- and manual graphic media is preferred, though not required. Experience with ArchiCAD (our BIM platform), Sketchup and similar applications are pluses. Active participation in the community-at-large is also a big plus.

Consider also the following: What does “forge” and “craft” mean to you?

Please submit resumes and portfolios to: resume@forgecraftarchitecture.com



ABOUT US

02:13

MARKET SECTORS

[Adaptive Reuse](#)

[Commercial and Mixed Use](#)

[Cultural Centers](#)

[Drink and Dine](#)

[Government](#)

[Healthcare](#)

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[K-12](#)

[Multi Family](#)

[Residential](#)

[Special Structures](#)

[View Our Portfolio](#)

Structures, an Austin-based structural engineering design firm, works with owners, architects, contractors and consultants to realize project goals. We offer full design services including feasibility assessment, schematic design, design development, construction documents and construction administration for new structures. Our reputation for strong project coordination as well as our vast knowledge of building systems, offer our clients a fully integrated structural design that is efficient, economical and constructible. Throughout the design process, we are mindful of the architectural intent, the needs of other consultants, the contractor's assembly and the owner's goals.

Jerry Garcia founded Structures in 1990 specializing in residential projects. He began with small projects and as his reputation for good engineering grew, so did the complexity, scope and company staff. One of our most complex residential projects was a \$35 million dollar residence that implemented a wide range of structural approaches to satisfy the architectural intent and construction schedule. This variety of structural solutions included structural steel, suspended cast in place concrete, pan joist concrete systems, load bearing structural CMU as well as light gage metal assemblies.

Structures has grown to provide services in other markets including higher education, government, hospitality, commercial and healthcare. Our focus on client service, proactive coordination and consideration for constructability that we cultivated on residential projects, has contributed to the great success on projects in other markets. Our ability to respond to unique structural challenges on time and within budget has earned our firm great recognition and respect among our peers in the design and construction industry.

Minority Certifications

- State of Texas HUB
- City of Austin Disadvantage Business Enterprise (DBE)
- City of Austin Minority Business Enterprise (MBE)
- City of Austin Small Business Enterprise (SBE)
- City of Austin Women-Owned Business Enterprise (WBE)
- NCTRCA Minority Business Enterprise (MBE)
- NCTRCA Small Business Enterprise (SBE)
- NCTRCA Woman Owned Business Enterprise (WBE)
- SCTRCA Minority Business Enterprise (MBE)

- SCTRCA Small Business Enterprise (SBE)
- SCTRCA Woman Owned Business Enterprise (WBE)

ABOUT US

Founded in 1990, Structures is an Austin based structural engineering firm.

4408 Burnet Rd.
Austin, TX 78756
T: 512.499.0919 | F: 512.320.8521
[Send us an email](#)

Certified as a State of Texas HUB, DBE, WBE and SBE.

Site Admin

SEARCH

VIDEOS

[Structures - Our 25th Year from StructuresPE on Vimeo.](#)

[Structures - Firm Profile from StructuresPE on Vimeo.](#)

SOCIAL MEDIA

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HEIDI CISNEROS Principal



Heidi Cisneros is the Managing Partner with Structures, a local structural engineering firm. With a strong background in accounting and business management, Heidi started with Structures during its founding over 25 years ago managing accounting and human resources. Heidi founded a second local firm providing civil engineering, which she grew and sold to focus on Structures. Heidi cut her teeth managing retail for a large national chain where she became the youngest manager within the organization's history and managed a store grossing \$1 million per week. Heidi received formal training through the University of North Texas and night classes while working full time.

In her current role as Managing Partner, Heidi directs all aspects of the firm's financial and business administration. Her foresight has assisted in creating long-term business strategies. Her ability to function as a key decision maker for the business has produced new opportunities and business ventures for growth and advancement.

Heidi is the Programs Chair for the Urban Land Institute Austin District Council and serves on the Management Committee and Advisory Board. She also sits on the P3 Local Member Council and the Technical Assistance Panels Committee. Heidi is a past treasurer of the Society for Marketing Professional Services, Austin Chapter, the current treasurer of her HOA, a member of the Austin Chamber, and served on a catholic ministry leadership team in Austin. She is a wife of 19 years with two teen-aged sons.

EDUCATION

The University of North Texas

PROFESSIONAL AFFILIATIONS

- Urban Land Institute
– Advisory Board and Management Committee

[LINKEDIN](#) | [EMAIL](#) | M: 512.431.8786

GET TO KNOW HEIDI

If you played hooky for a day, where would we find you?

Either playing outside with my family or having a glass of wine with my best friend

What are your hobbies?

My children and cooking for family and friends

Where would you live, if it couldn't be Austin?

Upper West Coast for the summer and various places in Europe all other times

Where do you gain your confidence?

I don't know if I would call it confidence or more of a gal that has vision with a mindset. If I see something that needs to get done or if I see something that could be done better, I roll up my sleeves and get to working on it. I usually pull in people to help in the endeavor.

What was the biggest risk you've ever taken?



Application for OHDA Funding – 2023

Tab 2c – Resumes of Property Management Team

Please note that because Austin Habitat for Humanity is not offering any rental units, we have not included information about property management.



Application for OHDA Funding – 2023

Tab 3 – Financial Information



Application for OHDA Funding – 2023

Tab 3a – Federal IRS Certification

ATLANTA GA 39901-0001

In reply refer to: 0752594951
Oct. 04, 2022 LTR 4170C 0
* 000000 00
00019886
BODC: WI

AUSTIN HABITAT FOR HUMANITY INC
500 W BEN WHITE BLVD
AUSTIN TX 78704



019572

Person to contact: Joseph Warren

Dear Taxpayer:

We're responding to your request of Sep. 27, 2022, about the tax-exempt status of Letter Of Affirmation

We issued a determination letter in August 1985, granting this organization exemption from federal income tax under Internal Revenue Code Section 501(c)(03).

Our records show this organization is not a private foundation within the meaning of Internal Revenue Code (IRC) Section 509(a) because it's described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions to this organization as provided in Internal Revenue Code (IRC) Section 170. Bequests, legacies, devises, transfers, or gifts to the organization or for its use are deductible for federal estate and gift tax purposes if they meet the requirements of IRC Sections 2055, 2106, and 2522.

If an organization fails to file a required annual return or notice for three consecutive years, its tax-exempt status is revoked by operation of law. This is stated in IRC Section 6033(j)(1). The revocation is effective on the filing due date of the third annual return or notice. For more information about filing requirements, you can visit our website at www.irs.gov/eo.

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

0752594951
Oct. 04, 2022 LTR 4170C 0
* 000000 00
00019887

AUSTIN HABITAT FOR HUMANITY INC
500 W BEN WHITE BLVD
AUSTIN TX 78704

Sincerely yours,

Sheralyn C. Hanks

Sheralyn C. Hanks
Ops. Manager, AM Ops. 3005



Application for OHDA Funding – 2023

Tab 3b – Certified Financial Audit

**AUSTIN HABITAT FOR HUMANITY, INC.
(A Nonprofit Corporation)**

**CONSOLIDATED FINANCIAL STATEMENTS
AND SUPPLEMENTARY INFORMATION**

As of and for the Years Ended December 31, 2021 and 2020

And Report of Independent Auditor

AUSTIN HABITAT FOR HUMANITY, INC.
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Report of Independent Auditor

To the Board of Directors
Austin Habitat for Humanity, Inc.
Austin, Texas

Opinion

We have audited the accompanying consolidated financial statements of Austin Habitat for Humanity, Inc. and its subsidiaries (the “Organization”), which comprise the consolidated statements of financial position as of December 31, 2021 and 2020, and the related consolidated statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of the Organization as of December 31, 2021 and 2020, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in *the Auditor’s Responsibilities for the Audit of the Consolidated Financial Statements* section of our report. We are required to be independent of the Organization and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization’s ability to continue as a going concern within one year after the date that the consolidated financial statements are available to be issued.

Auditor’s Responsibilities for the Audit of the Consolidated Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor’s report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and, therefore, is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audits.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audits.

Report on Supplementary Information

Our audits were conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The supplementary consolidating schedules of financial position information and consolidating schedule of activities information on pages 23 through 26, are presented for purposes of additional analysis and are not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audits of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the consolidated financial statements as a whole.



Austin, Texas
June 30, 2022

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATED STATEMENTS OF FINANCIAL POSITION

DECEMBER 31, 2021 AND 2020

	<u>2021</u>	<u>2020</u>
ASSETS		
Current Assets:		
Cash and cash equivalents	\$ 7,795,025	\$ 4,550,715
Restricted cash	1,792,129	-
Investments, at fair value	-	16,972
Accounts receivable	323,404	383,072
Pledges receivable, net	66,550	121,000
Mortgages receivable, current portion, net	767,274	789,238
ReStore inventory	1,659,178	852,421
Home construction in progress	856,968	2,960,958
Prepaid expenses and other current assets	537,367	213,751
Total Current Assets	<u>13,797,895</u>	<u>9,888,127</u>
Land held for development	4,683,150	4,958,354
Land held for sale	1,494,117	-
Pledges receivable, long-term portion, net	-	212,385
Mortgages receivable, long-term portion, net	8,657,287	8,994,125
Notes receivable, 2 nd liens, net	992,411	1,004,990
Property and equipment, net	10,896,064	9,763,461
Total Assets	<u>\$ 40,520,924</u>	<u>\$ 34,821,442</u>
LIABILITIES AND NET ASSETS		
Current Liabilities:		
Accounts payable	\$ 658,812	\$ 321,319
Accrued expenses	1,076,436	669,113
Deferred revenue	3,463,671	4,313,620
Line of credit	-	1,000,000
Capital lease obligation, current portion	37,484	36,378
Notes payable - TDHCA, current portion	109,658	111,816
Long-term debt, current portion	180,325	-
Paycheck Protection Program loan	768,200	768,200
Total Current Liabilities	<u>6,294,586</u>	<u>7,220,446</u>
Capital lease obligation, long-term portion	116,005	153,489
Notes payable - TDHCA, long-term portion	1,335,319	1,379,912
Long-term debt, net of unamortized debt issuance costs	8,842,541	5,327,414
Total Liabilities	<u>16,588,451</u>	<u>14,081,261</u>
Net Assets:		
Without donor restrictions	23,198,088	19,506,160
With donor restrictions	734,385	1,234,021
Total Net Assets	<u>23,932,473</u>	<u>20,740,181</u>
Total Liabilities and Net Assets	<u>\$ 40,520,924</u>	<u>\$ 34,821,442</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATED STATEMENT OF ACTIVITIES

YEAR ENDED DECEMBER 31, 2021

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Revenues:			
Contributions and Other Income:			
Contributions	\$ 2,652,548	\$ 199,984	\$ 2,852,532
Home building sponsorship revenues	2,107,376	-	2,107,376
Investment income	9,159	-	9,159
Other income	2,264,741	-	2,264,741
Net assets released from restrictions	699,620	(699,620)	-
Total Contributions and Other Income	<u>7,733,444</u>	<u>(499,636)</u>	<u>7,233,808</u>
ReStore Revenues:			
ReStore sales	7,318,500	-	7,318,500
In-kind donation of inventory	4,022,595	-	4,022,595
Cost of goods sold	(5,899,306)	-	(5,899,306)
Sales discounts and refunds	(290,288)	-	(290,288)
Total ReStore Revenues, net	<u>5,151,501</u>	<u>-</u>	<u>5,151,501</u>
Low-Cost Housing Revenues:			
Home sales	4,699,500	-	4,699,500
In-kind contributions of labor and construction materials	665,987	-	665,987
Mortgage discount and amortization	333,908	-	333,908
Other housing revenues	3,510	-	3,510
Cost of homes sold	(5,137,326)	-	(5,137,326)
Total Low-Cost Housing Revenues, net	<u>565,579</u>	<u>-</u>	<u>565,579</u>
Total Revenues	<u>13,450,524</u>	<u>(499,636)</u>	<u>12,950,888</u>
Expenses:			
Low-cost housing program	2,750,381	-	2,750,381
ReStore program	4,766,961	-	4,766,961
Fundraising	1,264,475	-	1,264,475
Management and general	976,779	-	976,779
Total Expenses	<u>9,758,596</u>	<u>-</u>	<u>9,758,596</u>
Change in net assets	3,691,928	(499,636)	3,192,292
Net assets, beginning of year	19,506,160	1,234,021	20,740,181
Net assets, end of year	<u>\$ 23,198,088</u>	<u>\$ 734,385</u>	<u>\$ 23,932,473</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATED STATEMENT OF ACTIVITIES

YEAR ENDED DECEMBER 31, 2020

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Revenues:			
Contributions and Other Income:			
Contributions	\$ 1,787,301	\$ 1,017	\$ 1,788,318
Home building sponsorship revenues	1,084,589	-	1,084,589
Investment income	6,862	-	6,862
Other income	371,783	-	371,783
Net assets released from restrictions	411,470	(411,470)	-
Total Contributions and Other Income	<u>3,662,005</u>	<u>(410,453)</u>	<u>3,251,552</u>
ReStore Revenues:			
ReStore sales	5,501,709	-	5,501,709
In-kind donation of inventory	2,912,667	-	2,912,667
Cost of goods sold	(4,263,940)	-	(4,263,940)
Sales discounts and refunds	(262,474)	-	(262,474)
Total ReStore Revenues, net	<u>3,887,962</u>	<u>-</u>	<u>3,887,962</u>
Low-Cost Housing Revenues:			
Home sales	1,188,028	-	1,188,028
In-kind contributions of labor and construction materials	519,172	-	519,172
Mortgage discount and amortization	201,579	-	201,579
Other housing revenues	2,795	-	2,795
Cost of homes sold	(1,462,595)	-	(1,462,595)
Total Low-Cost Housing Revenues, net	<u>448,979</u>	<u>-</u>	<u>448,979</u>
Total Revenues	<u>7,998,946</u>	<u>(410,453)</u>	<u>7,588,493</u>
Expenses:			
Low-cost housing program	2,425,699	-	2,425,699
ReStore program	3,314,697	-	3,314,697
Fundraising	793,081	-	793,081
Management and general	731,805	-	731,805
Total Expenses	<u>7,265,282</u>	<u>-</u>	<u>7,265,282</u>
Change in net assets	733,664	(410,453)	323,211
Net assets, beginning of year	<u>18,772,496</u>	<u>1,644,474</u>	<u>20,416,970</u>
Net assets, end of year	<u>\$ 19,506,160</u>	<u>\$ 1,234,021</u>	<u>\$ 20,740,181</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED DECEMBER 31, 2021

	Low-cost Housing	ReStore	Fundraising	Management and General	Total
Salaries and related	\$ 1,766,941	\$ 3,152,190	\$ 708,929	\$ 473,416	\$ 6,101,476
Advertisements	4,690	145,352	248,259	8,402	406,703
Office expenses	41,880	342,629	18,947	39,775	443,231
Information technology	63,251	74,088	22,092	18,359	177,790
Occupancy	116,144	465,053	3,888	11,030	596,115
Travel	6,395	31,263	4,555	6,564	48,777
Conference, conventions, and meetings	1,744	14,702	2,399	136,778	155,623
Interest and amortization	18,721	143,793	6,757	6,570	175,841
Tithe to HFHI	226,334	-	-	-	226,334
Depreciation	26,454	221,797	10,556	22,206	281,013
Insurance	52,543	122,452	2,646	3,087	180,728
Warrant work	6,623	-	-	-	6,623
Tools and equipment	8,310	1,267	-	373	9,950
Professional services	65,595	21,869	4,445	211,645	303,554
Dues and subscriptions	22,635	19,675	14,446	32,537	89,293
Home repair program	309,754	-	2,522	(22)	312,254
Other expense	12,367	10,831	214,034	6,059	243,291
Total	\$ 2,750,381	\$ 4,766,961	\$ 1,264,475	\$ 976,779	\$ 9,758,596

The accompanying notes to the consolidated financial statements are an integral part of these statements.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED DECEMBER 31, 2020

	Low-cost Housing	ReStore	Fundraising	Management and General	Total
Salaries and related	\$ 1,650,251	\$ 2,195,034	\$ 588,463	\$ 484,474	\$ 4,918,222
Advertisements	729	88,024	117,657	641	207,051
Office expenses	44,305	160,094	18,227	31,325	253,951
Information technology	53,093	63,766	17,542	24,594	158,995
Occupancy	99,275	296,300	2,221	5,299	403,095
Travel	6,771	17,474	2,183	2,851	29,279
Conference, conventions, and meetings	1,343	10,753	1,038	14,926	28,060
Interest and amortization	12,864	141,534	6,978	8,209	169,585
Tithe to HFHI	91,333	-	-	-	91,333
Depreciation	27,485	213,431	10,161	15,529	266,606
Insurance	61,081	95,928	2,125	2,421	161,555
Warrant work	18,597	-	-	-	18,597
Tools and equipment	7,918	440	-	-	8,358
Professional services	63,057	9,726	11,233	106,736	190,752
Dues and subscriptions	17,100	10,725	13,277	22,536	63,638
Home repair program	260,731	-	1,236	-	261,967
Other expense	9,766	11,468	740	12,264	34,238
Total	\$ 2,425,699	\$ 3,314,697	\$ 793,081	\$ 731,805	\$ 7,265,282

The accompanying notes to the consolidated financial statements are an integral part of these statements.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATED STATEMENTS OF CASH FLOWS

DECEMBER 31, 2021 AND 2020

	2021	2020
Cash flows from operating activities:		
Change in net assets	\$ 3,192,292	\$ 323,211
Adjustments to reconcile change in net assets to net cash flows from operations:		
Noncash interest expense	14,495	16,447
Depreciation	281,013	266,606
Gain on extinguishment of debt	(768,200)	-
Depreciation (Appreciation) in investments	11	(768)
Gain on sale of mortgage notes receivable	-	(181,448)
Change in operating activities:		
Accounts receivable	59,668	232,027
Pledges receivable	266,835	144,500
Mortgages receivable	358,802	43,021
ReStore inventory	(806,757)	(9,867)
Home construction in progress	2,103,990	(2,289,124)
Prepaid expenses and other	(323,616)	86,454
Land held for development	275,204	115,031
Land held for sale	(1,494,117)	-
Notes receivable, 2 nd liens	12,579	(36,147)
Other long-term assets	-	240,790
Accounts payable	337,493	47,024
Accrued expenses	407,323	(98,527)
Deferred revenue	(849,949)	1,182,638
Notes payable - TDHCA	(46,751)	9,274
Net cash from operating activities	<u>3,020,315</u>	<u>91,142</u>
Cash flows from investing activities:		
Sales of investments	16,961	-
Purchases of property and equipment	(1,413,616)	(218,197)
Proceeds from the sale of mortgage notes receivable	-	901,460
Net cash from investing activities	<u>(1,396,655)</u>	<u>683,263</u>
Cash flows from financing activities:		
Net (payments) proceeds on line of credit	(1,000,000)	1,000,000
Payments on long-term debt	-	(2,272)
Payments on capital lease obligation	(36,378)	(32,380)
Proceeds from issuance of long-term debt	3,680,957	-
Proceeds from Paycheck Protection Program loan	768,200	768,200
Net cash from financing activities	<u>3,412,779</u>	<u>1,733,548</u>
Net increase in cash and cash equivalents	5,036,439	2,507,953
Cash, cash equivalents and restricted cash, beginning of year	4,550,715	2,042,762
Cash, cash equivalents and restricted cash, end of year	<u>\$ 9,587,154</u>	<u>\$ 4,550,715</u>
Supplemental disclosure of cash flow information:		
Cash paid for interest	<u>\$ 161,420</u>	<u>\$ 155,090</u>

The accompanying notes to the consolidated financial statements are an integral part of these statements.

AUSTIN HABITAT FOR HUMANITY, INC.

NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 1—Organization

Austin Habitat for Humanity, Inc. (“AHFH”) is a nonprofit, affordable housing developer dedicated to the elimination of substandard housing in and around Austin, Texas. It is affiliated with Habitat for Humanity International, Inc. (“HFHI”) based in Americus, Georgia. AHFH was incorporated in 1985 under the laws of the state of Texas. While adhering to the policies and procedures prescribed by HFHI, AHFH exists as a separate corporation with its own Board of Directors (the “Board”). Local policies, strategies, operations, and fundraising are the responsibility of each affiliate.

Austin Neighborhood Alliance for Habitat, Inc., (the “Alliance”) is a wholly owned non-profit corporation formed to support AHFH. The Alliance receives federal financial assistance to acquire land and develop infrastructure for homes.

HomeBase Texas (“HomeBase”) is a wholly owned non-profit corporation that provides affordable homeownership opportunities to homeowners by partnering with outside developers, builders, and agencies.

Low-Cost Housing Program – To be considered for home ownership, families must be low-income families who demonstrate a need for better housing, an ability to make mortgage payments, and a willingness to work in partnership with AHFH. The partnership consists, in part, of each family completing 300 hours of “sweat equity” and meeting monthly mortgage payments. AHFH acquires the land, finds and qualifies the families, raises the funding, finds and supervises construction volunteers, builds the houses, and funds the mortgages. Houses are sold resulting in either a no interest or zero profit on the mortgage. By policy of HFHI, AHFH may accept government support for land, infrastructure improvements and construction.

ReStore Program – AHFH also operates three ReStores, two in Austin and one in San Marcos, as well as an online store, ShopAustinRestore.com. The ReStore program provides access to quality building materials, new and used, household goods, clothing, etc., to the general public to help them create a better human habitat in which to live and work. The ReStore receives donated materials, purchases items, and sells them.

Note 2—Summary of significant accounting policies

Basis of Presentation – The consolidated financial statements are presented in accordance with generally accepted accounting principles in the United States of America (“U.S. GAAP”) as defined by the Financial Accounting Standards Board (“FASB”) Accounting Standards Codification (“ASC”).

Consolidation – The Alliance and HomeBase financial statements are consolidated into the financial statements of AHFH because AHFH has control over and an economic interest in the Alliance and HomeBase. AHFH and its affiliates, the Alliance and HomeBase, are collectively referred to as the Organization. All significant intercompany accounts and transactions have been eliminated in consolidation.

Net Asset Classification – In accordance with FASB ASC Topic 958, *Not-for-Profit Entities*, the Organization is required to report information regarding its financial position and activities according to two classes of net assets:

Net Assets Without Donor Restrictions – Net assets that are not subject to stipulations. Net assets without donor stipulations may be used for any purpose or designated for specific purposes by the Organization. As of December 31, 2021 and 2020, AHFH had no Board designated net assets.

Net Assets With Donor Restrictions – Net assets that are subject to donor-imposed stipulations, which limit their use by the Organization to a specific purpose and/or the passage of time.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 2—Summary of significant accounting policies (continued)

Use of Estimates – The preparation of consolidated financial statements in conformity with U.S. GAAP requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates. Significant estimates include the fair value of investments, allowances for uncollectable receivables, useful lives of property and equipment, functional expense allocation, and the valuation of in-kind services and materials.

Advertising Costs – Advertising costs are expensed when incurred. Advertising expense for the years ended December 31, 2021 and 2020 were \$406,703 and \$207,051, respectively.

Fair Value Measurements – The Organization measures and discloses fair value measurements in accordance with the authoritative literature. Fair value is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Fair value accounting requires characterization of the inputs used to measure fair value into a three-level fair value hierarchy as follows:

Level 1 – Inputs based on quoted market prices in active markets for identical assets or liabilities. An active market is a market in which transactions occur with sufficient frequency and volume to provide pricing information on an ongoing basis.

Level 2 – Observable inputs that reflect the assumptions market participants would use in pricing the asset or liability developed based on market data obtained from sources independent from the entity.

Level 3 – Unobservable inputs that reflect the Organization’s own assumptions about the assumptions market participants would use in pricing the asset or liability developed based on the best information available.

Cash and Cash Equivalents – The Organization considers all highly liquid investments with an original maturity of three months or less to be cash equivalents.

Restricted Cash – Restricted cash represents proceeds received from the loan agreement with Frost bank to be used to construct a new warehouse in south Austin (see Note 10).

Supplemental Cash Flow Information – The following table sets forth the Organization’s reconciliation of cash and restricted cash reported within the statements of cash flows for the years ended December 31:

	<u>2021</u>	<u>2020</u>
Cash	\$ 7,795,025	\$ 4,550,715
Restricted Cash	1,792,129	-
Total cash and restricted cash shown in the statement of cash flows	<u>\$ 9,587,154</u>	<u>\$ 4,550,715</u>

Investments, at fair value – Investments are all held in mutual funds and are carried at fair market value as level one investments, which are based on quoted market prices. Any changes in market value are reported in the consolidated statements of activities as increases or decreases to investment income.

Accounts Receivable – Accounts receivable is recorded at the amount the Organization expects to collect on outstanding balances. The Organization has not recorded an allowance for uncollectible accounts receivable at December 31, 2021 or 2020 as management believes all balances to be collectible.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 2—Summary of significant accounting policies (continued)

Pledges Receivable – Pledges receivable is recorded at the amount the Organization expects to receive from donors. Promises to give are recorded at fair value if expected to be collected in one year and at net present value if expected to be collected in more than one year. Although the Organization has not experienced material uncollectible amounts in the past, an allowance for uncollectible pledges receivable has been established. The allowance at December 31, 2021 and 2020, was \$-0- and \$79,615, respectively. The Organization did not apply a net present value discount on the pledges receivable balance as of December 31, 2021 and 2020 as management considered the amount to be insignificant.

Home Sales and Mortgages Receivable – Home sales represent the sale to qualified families of houses built in Austin, Texas, or the Greater Austin Area, by the Organization. Homes are sold at affordable prices and the sales are financed by the Organization utilizing non-interest bearing 15 to 35-year mortgages due in monthly installments from the families. The mortgages are secured by the underlying real estate and are carried at the unpaid principal balances. On certain older loans, a “soft” (0% interest, deferred, forgivable after 30 years) second mortgage was used to secure the difference between the affordable mortgage amount and the market value. This practice ended in 2016 with the addition of a deed restriction that effectively locked this equity into the property, making it inaccessible to the homeowner at resale.

Mortgages receivable is discounted based upon prevailing market interest rates for low-income housing at the inception of the mortgages. The financing discounts are amortized and reflected as mortgage discount and amortization in the accompanying consolidated statements of activities when mortgage payments are collected.

Notes Receivable, 2nd Liens – Notes receivable is a deferred repayable 2nd lien with the first payment due after 30 years, amortizing over five years thereafter. The 2nd lien is attached to a home sale to qualified applicants under the HomeBase Texas program. The first lien is provided for by a traditional third party lender. The second lien is due and payable between 20 to 30 years to allow for the first lien to have been paid off and provides a subsidy that allows the home sale to meet the affordability requirements of the HomeBase Texas program. These notes are discounted based upon prevailing market interest rates for low-income housing at the inception of the mortgages. The Organization has not recorded an allowance for uncollectible notes receivable at December 31, 2021 or 2020 as management believes all balances to be collectible.

Allowance for Credit Losses – The Organization’s allowance for credit losses is that amount considered adequate to absorb probable losses based on management’s evaluations of the size and current risk characteristics of the mortgage loan portfolios. Such evaluations consider historical and current portfolio performance information and experience with clients. Specific allowances for credit losses are established for large impaired notes on an individual basis. A note is considered impaired when, based on current information and events, it is probable that the Organization will be unable to collect the scheduled payments when due according to the contractual terms of the promissory note. The specific allowances established for these loans are based on a thorough analysis of the most probable source of repayment, including the estimated fair value of the underlying collateral.

The Organization monitors the mortgages on a monthly basis and considers all mortgages to be collectible, thus no allowance for loan losses has been recorded. The Organization maintains a partner relationship with the mortgagees. However, the Organization will consider foreclosure proceedings on any delinquent accounts if the partner family ceases to have the ability to pay and make payments on the mortgage or no longer has a willingness to partner with the Organization. At December 31, 2021 and 2020, the Organization had no investment in foreclosed loans.

ReStore Inventory – ReStore inventory consists of donated building materials, household items and clothing as well as purchased building materials available for sale. Donated inventory is recorded as in-kind contributions at fair value when received based on estimated sales value. Purchased inventory is stated at the lower of cost or market determined by the first-in first-out method.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 2—Summary of significant accounting policies (continued)

Home Construction in Progress – Home construction in progress represents home construction and land costs incurred on incomplete homes in progress and completed homes not yet conveyed to the recipient family. Once sold and conveyed, the home costs are expensed to cost of homes sold in the accompanying consolidated statements of activities.

Land Held for Development – Land held for development includes the costs of purchasing and developing land. Costs incurred to improve land are capitalized when incurred. Interest incurred on related debt during the construction period is capitalized as incurred. Once construction of a home on a lot is completed, the cost of the associated lot is expensed in cost of homes sold on the accompanying consolidated statement of activities.

Property and Equipment – Property and equipment consists of land, buildings, and equipment. Property and equipment additions are recorded at cost if purchased or estimated fair value if donated less accumulated depreciation. The Organization capitalizes all additions over \$1,000 and expenses maintenance and repairs that do not improve or extend the useful lives of the respective assets. Depreciation is calculated on a straight-line basis over the estimated useful lives of the respective assets. Estimated useful lives are three to five years for computer equipment; five years for building improvements, software, and vehicles; three to seven years for tools and construction equipment; and twenty to forty years for completed houses and buildings. Property and equipment under capital lease is amortized over the shorter of the lease term or the expected useful life of the asset.

Long-lived assets subject to amortization are reviewed for impairment whenever events or circumstances indicate that the amount recorded may not be recoverable. An impairment loss is recognized by the amount in which the carrying amount of the asset exceeds fair value, if the carrying amount of the asset is not recoverable. Management believes there has been no impairment of such assets as of December 31, 2021 and 2020.

Debt Issuance Costs – Debt issuance costs associated with long-term debt are recorded as a reduction of the related debt balance and amortized to interest expense over the term of the related arrangement.

Notes Payable - TDHCA – The Texas Department of Housing and Community Affairs Department (“TDHCA”) administers the Owner- Builder Loan Program, also known as the Texas Bootstrap Loan Program (“Bootstrap Program”). The Bootstrap Program is a self-help housing construction program that provides the owners and builders of very low-income families an opportunity to purchase or refinance real property on which to build new housing or repair their existing homes through “sweat equity.” Owner builder’s household income may not exceed 60% of Area Median Family Income. The Bootstrap Program notes payable are discounted based upon prevailing market interest rates at the inception of the mortgage. The financing discounts are amortized and reflected as mortgage discount and amortization in the accompanying consolidated statements of activities as the mortgage payments are made.

ReStore Sales Revenue – The Organization operates three thrift retail stores and has an online presence with its ShopAustinReStore.com website and various online shopping websites such as eBay, Etsy, etc. The stores provide access to quality building materials, new and used household goods, clothing, furnishings, and other construction materials and is open to the general public. The stores receive donated materials and purchase items for resale. Sales are recognized on a daily basis as they occur.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 2—Summary of significant accounting policies (continued)

Contribution Revenue – All contributions, including home building sponsorship revenues and noncash contributions, are recorded at their fair value and are considered to be available for operations of the Organization unless specifically restricted by the donor. Unconditional promises to give cash and other assets are reported as net assets with donor restrictions if they are received with donor stipulations that limit the use of donated assets. When donor restrictions expire, that is, when a stipulated time restriction ends or restricted purpose is accomplished, the related net assets are reclassified to net assets without donor restrictions. This is reported in the accompanying consolidated statements of activities as net assets released from restrictions. Contributions that are restricted by the donor are reported as increases in net assets without donor restrictions if the restrictions expire within the fiscal year in which the contributions are received. Conditional promises to give are recognized only when the conditions on which they depend are substantially met and the promises become unconditional.

Government Grant Revenue – The Organization receives funding from governmental financial assistance programs that supplement its traditional funding sources. The awards provide for reimbursement of qualifying costs incurred, as defined in the underlying award agreements. The Organization recognizes revenue from these awards as services are rendered and expenses are incurred.

The Organization also receives funding in the form of forgivable loans from the City of Austin through the Austin Housing Finance Corporation for the purpose of constructing, rehabilitating, and preserving affordable housing. The Organization recognizes revenue at the time the loan is forgiven which is when a home is sold to an income qualified buyer.

Home Building Sponsorship Revenues – The Organization sells sponsorship opportunities to local businesses and organizations to underwrite the costs of constructing a house. In addition to recognition as an Austin Habitat for Humanity partner, typically the sponsorship includes the option for the entity to volunteer on the build site. Sponsorship revenues are recognized in the year they are received.

In-Kind Contributions of Labor – A substantial number of volunteers have made significant contributions of their time to the Organization's program and supporting services. Donated services are recognized as contributions if the services (1) create or enhance non-financial assets, or (2) require specialized skills, are performed by people with those skills, and would otherwise be purchased by the Organization. Under those criteria, volunteer time and professional services donated to construct homes is recognized as contribution revenue and capitalized as home construction in progress. When homes are transferred to recipient families, home construction in progress is recorded as a component of cost of homes sold within the accompanying consolidated statements of activities.

Functional Expense Allocation – The costs of providing various programs and other activities have been summarized on a functional basis in the consolidated statements of activities. Accordingly, certain expenses are allocated between functional categories based on management's estimates. Expenses relating to more than one function are allocated to low-cost housing program, ReStore program, fundraising, and management and general based on employee time and effort estimates. Allocations to low-cost housing and ReStore programs are for activities that result in services being distributed to beneficiaries, donors, or others that fulfill the mission of the Organization. Allocations to management and general expenses include accounting, general management and oversight, audit, budgeting, human resources, legal and admin support of the Board of Directors. Allocations for fundraising are primarily for fundraising activities for operations. Management and general expenses include those expenses that are not directly identifiable with any other specific function but provide overall support and direction of the Organization.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 2—Summary of significant accounting policies (continued)

Federal Income Taxes – AHFH, the Alliance, and HomeBase are all non-profit organizations exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code, except with respect to any unrelated business income. AHFH, the Alliance and HomeBase did not incur any tax liabilities for unrelated business income during the years ended December 31, 2021 or 2020. The Board assesses uncertainties in income taxes in its consolidated financial statements and uses a threshold of more-likely-than-not for recognition and derecognition of tax positions taken. Management determined no uncertain tax positions have been taken. There is no provision or liability for federal income taxes in the accompanying consolidated financial statements related to the Organization. AHFH, the Alliance, and HomeBase file Form 990 tax returns in the U.S. federal jurisdiction and are subject to routine examinations of its returns. However, there are no examinations currently in progress.

Recent Accounting Pronouncements – In February 2016, FASB issued Accounting Standards Update (“ASU”) 2016-02, *Leases* (Topic 842). This ASU requires a lessee to recognize on its balance sheet a right-of-use asset and a lease liability under most operating leases. For private companies, the ASU is effective for annual periods beginning after December 15, 2021. Early adoption is permitted. The Organization is currently evaluating the effects that the adoption of ASU 2016-02 will have on its consolidated financial statements.

In September 2020, FASB issued ASU 2020-07, *Presentation and Disclosures by Not-for-Profit Entities for Contributed Nonfinancial Assets*. The standard requires presentation of contributed nonfinancial assets as a separate line item in the statement of activities, apart from contributions of cash and other financial assets. It also requires a disclosure of disaggregated contributions of nonfinancial assets by category that depicts the type of contributed nonfinancial assets. This distinction will increase transparency of contributions recognized. This standard will be effective for fiscal years beginning after June 15, 2021. The Organization is currently evaluating the effects the adoption of ASU 2020-07 will have on its consolidated financial statements.

In June 2016, FASB issued ASU 2016-13, *Financial Instruments-Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments*. The standard requires certain financial assets to be measured at amortized cost net of an allowance for estimated credit losses, such that the net receivable represents the present value of expected cash collection. The new rules also require that certain financial assets be measured at amortized cost reflecting an allowance for estimated credit losses that are expected to occur over the life of the assets. This standard will be effective for fiscal years beginning after December 15, 2022. Early adoption is permitted. The Organization adopted the provisions of ASU 2016-13 as of January 1, 2021 using a modified retrospective approach, which resulted in no cumulative effect adjustment to net assets.

Management’s Review – The Organization evaluates events that occur subsequent to the statement of financial position date of periodic reports, but before financial statements are issued for periods ending on such dates, for possible adjustment to such financial statements or other disclosure. This evaluation generally occurs through the date at which the Organization’s consolidated financial statements are available for issuance. For the consolidated financial statements as of and for the year ending December 31, 2021, this date was June 30, 2022.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 3—Liquidity

The Organization's financial assets available within one year of the balance sheet date for general expenditure are as follows:

Cash and cash equivalents	\$ 7,795,025
Accounts receivable, net	323,404
Pledges receivable, net	66,550
Mortgages receivable, current portion, net	767,274
	<u>\$ 8,952,253</u>

Receivable balances are expected to be collected within one year. Total net assets without donor restrictions as of December 31, 2021 were approximately \$23,200,000. The Organization also maintains an available line of credit of \$2,000,000 with Frost Bank that is available for draw. This is sufficient capital to fund the anticipated growth of the Organization over the next twelve months as well as any unanticipated contingencies or losses.

Note 4—Concentrations of credit risk

Financial instruments which potentially subject the Organization to concentrations of credit risk consist principally of cash and cash equivalents, investments, and its receivables.

As of December 31, 2021 and 2020, the Organization had cash and cash equivalents in excess of insured limits of approximately \$7,970,000 and \$3,904,000, respectively. Management believes no significant risk exists with respect to cash and cash equivalents.

Investments do not represent a significant concentration of credit risk due to the diversification of the Organization's portfolio among instruments and issues. However, investment securities are exposed to various risks, such as interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the near-term could materially affect the amounts reported in the statement of financial position.

The Organization does not maintain collateral for its receivables except for mortgages and notes receivable and does not believe significant risk exists at December 31, 2021 or 2020. Credit risk for mortgages and notes receivable is concentrated because substantially all of the balances are due from individuals located in the same geographic region. Management considered the collateral pledged from mortgages and notes receivable to be adequate at December 31, 2021 and 2020.

Note 5—Related party transactions and affiliations

Contributions from members of the Board for the years ended December 31, 2021 and 2020 were \$129,838 and \$78,012, respectively. Pledges receivable from the Board and employees of AHFH for the years ended December 31, 2021 and 2020 were \$9,550 and \$412,000, respectively. Expenses paid by the Organization for services provided by Board related businesses for the years ended December 31, 2021 and 2020 were \$405,710 and \$679,544, respectively.

The Organization operates within a covenant agreement with HFHI. The Organization tithes to support HFHI's international homebuilding work. Tithes to HFHI totaled \$226,334 and \$91,333 for the years ended December 31, 2021 and 2020, respectively.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 6—Mortgages and notes receivable

Mortgages receivable consisted of the following at December 31:

	<u>2021</u>	<u>2020</u>
Gross mortgages receivable	\$ 14,559,205	\$ 15,318,457
Financing discount based on imputed interest at rates ranging from 4% to 8%	<u>(5,134,644)</u>	<u>(5,535,094)</u>
Mortgages receivable, net of unamortized discount	9,424,561	9,783,363
Current portion of mortgages receivable	<u>(767,274)</u>	<u>(789,238)</u>
	<u>\$ 8,657,287</u>	<u>\$ 8,994,125</u>

Mortgages receivable were valued using the income approach and inputs were considered Level 2 under the fair value hierarchy. Gross undiscounted future mortgage payments scheduled to be collected at December 31, 2021 are as follows:

2022	\$ 767,274
2023	766,777
2024	746,976
2025	739,548
2026	729,732
Thereafter	<u>10,808,898</u>
	<u>\$ 14,559,205</u>

Notes receivable on 2nd liens consisted of the following at December 31:

	<u>2021</u>	<u>2020</u>
Gross notes receivable for 2 nd liens	\$ 2,959,920	\$ 3,110,446
Financing discount based on imputed interest at rates ranging from 4% to 8%	<u>(1,967,509)</u>	<u>(2,105,456)</u>
Notes receivable on 2 nd liens, net of unamortized discount	<u>\$ 992,411</u>	<u>\$ 1,004,990</u>

During 2020, the Organization sold 40 mortgages without recourse to a financial institution for \$901,460. These mortgages had balances of \$1,023,832 (\$893,750 net of unamortized discount) as of the cut-off date for the transaction. The Organization recorded a gain on the sale of mortgages of \$181,448 for the year ended December 31, 2020. As per the terms of the sale agreements, AHFH remains responsible for the servicing of these mortgage notes receivable. The mortgage notes receivable sold are no longer included as assets in the consolidated statements of financial position.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 7—ReStore inventory

ReStore inventory consisted of the following at December 31:

	2021	2020
Donated goods	\$ 432,597	\$ 248,911
Purchased materials	1,226,581	603,510
	<u>\$ 1,659,178</u>	<u>\$ 852,421</u>

Note 8—Property and equipment

Property and equipment consisted of the following at December 31:

	2021	2020
Land	\$ 3,678,393	\$ 3,678,393
Buildings and improvements	7,970,903	6,943,306
Equipment	837,494	551,622
Trucks	379,333	279,185
	12,866,123	11,452,506
Accumulated depreciation	(1,970,059)	(1,689,045)
Total property and equipment, net	<u>\$ 10,896,064</u>	<u>\$ 9,763,461</u>

Property and equipment financed under capital lease obligations totaled \$153,489 and \$189,867, net of accumulated amortization of \$206,208 and \$168,830, as of December 31, 2021 and 2020, respectively. Total depreciation and amortization expense was \$281,013 and \$266,606 for the years ended December 31, 2021 and 2020, respectively.

Note 9—Pledges receivable

The Organization received Pledges to fund new ReStores and future purchases of land. Pledges are stated at their realizable value, net of an allowance for uncollectible pledges. The Organization did not record a discount on long term pledges given the nominal impact on the consolidated financial statements.

Net pledges receivable consisted of the following at December 31:

	2021	2020
Capital campaign pledges	\$ 66,550	\$ 413,000
Less allowance for doubtful collections	-	(79,615)
Pledges receivable, net	<u>\$ 66,550</u>	<u>\$ 333,385</u>

Pledges receivable maturity dates at December 31 were as follows:

	2021	2020
Less than one year	\$ 66,550	\$ 121,000
One to five years	-	292,000
	<u>\$ 66,550</u>	<u>\$ 413,000</u>

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 10—Long-term debt

Long-term debt consisted of the following at December 31:

	<u>2021</u>	<u>2020</u>
Promissory note to banking institution	\$ 7,250,000	\$ 5,457,871
Construction loan payable to banking institution	38,828	-
Habitat Mortgage Solutions loan	1,850,000	-
Total debt	9,138,828	5,457,871
Unamortized debt issuance costs	(115,962)	(130,457)
Total debt, net of unamortized debt issuance costs	9,022,866	5,327,414
Current portion of debt, net	(180,325)	-
Long-term debt, net	<u>\$ 8,842,541</u>	<u>\$ 5,327,414</u>

On May 1, 2014, the Organization entered into a loan agreement for \$5,500,000 with Wells Fargo Bank for the purpose of financing the acquisition of the land and building for the Austin ReStore. The promissory note was a fixed interest rate note (3.82% at December 31, 2019) with escalating monthly payments due through the maturity date of June 1, 2039. This note was secured by the Austin ReStore's land and building. On December 30, 2019, the Organization refinanced this loan with Frost Bank. The new loan has a fixed interest rate of 3.03% and matures on December 30, 2029. Interest only shall be due and payable monthly on the last day of the month beginning on January 30, 2020 until December 30, 2021 at which time monthly installments of both principal and interest will be due and payable until the maturity date. This note is secured by the Austin ReStore's land and building in addition to the construction of a new warehouse in south Austin. The principal amount of this note is \$7,500,000 and the Organization was advanced \$7,250,000 as of December 31, 2021.

On December 1, 2021, the Organization entered into a promissory note for \$1,850,000 with Habitat Mortgage Solutions for the purpose of financing the acquisition of land upon which the Organization will construct thirty affordable housing units. The note bears interest at a rate of 3.00% per annum and matures December 31, 2025. Interest only payments are due quarterly beginning December 31, 2021. Home sale prepayment amounts are due on June 30th of each year following the year in which the twelfth home is sold. The home sale prepayment amount is calculated by multiplying the number of homes sold in the prior fiscal year by \$97,368. The note is secured by the acquired land. The outstanding balance on the note is \$1,850,000 as of December 31, 2021.

On November 3, 2021, the Organization entered into a promissory note for \$2,100,000 with a financial institution. The note has a fixed interest rate of 3.97% per annum and matures on November 3, 2031. Interest only shall be due and payable monthly on the third day of the month beginning on December 3, 2021 until December 3, 2022 at which time monthly installments of both principal and interest will be due and payable until the maturity date. The Organization was advanced \$38,828 as of December 31, 2021.

Future maturities of long-term debt at December 31, 2021 are as follows:

<u>Years Ending December 31,</u>	
2022	\$ 180,325
2023	206,031
2024	212,370
2025	2,068,905
2026	225,640
Thereafter	6,245,557
	<u>\$ 9,138,828</u>

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 10—Long-term debt (continued)

The credit facility (see Note 12), notes payable, and other long-term debt agreements contain certain financial covenants, including requirements for liquidity, earnings, and fixed charge coverage. The agreements also contain additional conditions limiting indebtedness, capital expenditures, and various other covenants as defined in the agreements. Failure to comply with the covenants could result in the debt being called by the lenders. As of December 31, 2021, and through the date of this report, the Organization was in compliance with such covenants.

Note 11—Paycheck Protection Program loan

In April 2020 and March 2021, the Organization received loans each for \$768,200 under the Paycheck Protection Program (“PPP”) as part of the Coronavirus Aid, Relief, and Economic Security Act (“CARES Act”). Under the terms of the CARES Act, PPP loan recipients can apply for, and be granted, forgiveness of all or a portion of the loans granted under the PPP loan. Such forgiveness is determined, subject to limitations and ongoing rulemaking by the U.S. Small Business Administration (“SBA”), based on the use of loan proceeds for payroll costs and mortgage interest, rent or utility costs, and the maintenance of employee and compensation levels. The Organization applied for forgiveness with the SBA and received correspondence from the SBA in April 2021 that the original PPP loan had been forgiven in full. As a result, the Organization recognized \$768,200 of the PPP loan forgiveness as other income in the accompanying consolidated statement of activities. The Organization applied for forgiveness with the SBA and received correspondence from the SBA in March 2022 that the second PPP loan had been forgiven in full.

Note 12—Credit facility and letters of credit

On December 30, 2019, the Organization entered into a credit facility with Frost Bank. The credit facility has a maximum principal amount available of \$2,000,000. The credit facility was amended in December 2021 to extend the maturity date to December 30, 2022. The annual interest rate for the new credit facility is a variable rate based on AMERIBOR plus 1.5% (0.15% at December 31, 2021). No amounts have been drawn against this facility at December 31, 2021.

In April 2020, the Organization entered into a revolving line of credit with a community foundation to complete construction of its Philomena row homes in the Mueller subdivision. The revolving line of credit has a maximum borrowing capacity of \$1,000,000 and borrowings bear interest at 1%. The revolving line of credit matures in April 2022 and was not renewed. Quarterly interest only payments are required beginning July 2020 and continue through maturity. All unpaid principal and accrued but unpaid interest is due and payable upon maturity. As of December 31, 2021, AHFH had a balance of \$-0- outstanding on this revolving line of credit.

In June 2021, the Organization entered into a guidance line of credit with Pioneer Bank. The guidance line of credit has a maximum borrowing capacity of \$3,000,000 and borrowings bear interest at the floating Pioneer Bank Prime Rate (3.25% at the time of the agreement). The guidance line of credit is available beginning on the date of close and for the next twelve months. Individual notes issued under the guidance line of credit mature three years from the date each note closes. Monthly interest only payments are required beginning the first month after the individual notes are issued and continue through maturity. All unpaid principal and accrued but unpaid interest is due and payable upon each maturity date. As of December 31, 2021, AHFH had a balance of \$-0- outstanding on this guidance line of credit.

During the normal course of business, the Organization entered into letters of credit with financial institutions totaling \$639,078 and \$462,730 at December 31, 2021 and 2020, respectively, pursuant to subdivision construction agreements with the city of Austin. The letters of credit have expiration dates between March 2022 and January 2023. The letters specify that amounts may be drawn by the city of Austin. There have been no amounts drawn under these letters of credit as of December 31, 2021 or 2020.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 13—Notes payable - TDHCA

Notes payable to TDHCA consisted of the following at December 31:

	<u>2021</u>	<u>2020</u>
Gross notes payable - TDHCA	\$ 2,212,330	\$ 2,313,045
Financing discount based on imputed interest at rates ranging from 4% to 7%	<u>(767,353)</u>	<u>(821,317)</u>
Mortgages receivable, net of unamortized discount	1,444,977	1,491,728
Current portion of mortgages receivable	<u>(109,658)</u>	<u>(111,816)</u>
	<u>\$ 1,335,319</u>	<u>\$ 1,379,912</u>

Notes payable to TDHCA were valued using the income approach and inputs were considered Level 2 under the fair value hierarchy. Gross undiscounted future mortgage payments scheduled to be collected from mortgagees and remitted to TDHCA at December 31, 2021 are as follows:

Years Ending December 31,

2022	\$ 109,658
2023	109,659
2024	109,659
2025	109,659
2026	109,659
Thereafter	<u>1,664,036</u>
	<u>\$ 2,212,330</u>

Note 14—Net assets with donor restrictions

Net assets with donor restrictions were available for the following purposes at December 31:

	<u>2021</u>	<u>2020</u>
Capital campaign	\$ 515,476	\$ 1,013,438
Special events	211,580	211,580
UT Campus Chapter	<u>7,329</u>	<u>9,003</u>
	<u>\$ 734,385</u>	<u>\$ 1,234,021</u>

Net assets released from restrictions consisted of the following at December 31:

	<u>2021</u>	<u>2020</u>
Capital campaign	\$ (697,946)	\$ (169,405)
Special events	-	(188,625)
UT Campus Chapter	(1,674)	(786)
OWANA	-	<u>(52,654)</u>
Net assets released from restrictions	<u>\$ (699,620)</u>	<u>\$ (411,470)</u>

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 15—Retirement plan

The Organization sponsors a 401(k) plan that covers substantially all employees. The Organization’s contributions to the plan for the years ended December 31, 2021 and 2020 were \$168,089 and \$151,659, respectively.

Note 16—Lease commitments

The Organization leases retail space, a construction warehouse, telephone equipment, and a copier under various noncancelable operating leases. Rent expense under these leases totaled \$392,176 and \$279,288 for the years ended December 31, 2021 and 2020, respectively, which are reflected as occupancy and office expenses in the accompanying statements of functional expenses. In October 2018, AHFH entered into a new operating lease for the San Marcos ReStore location which opened to the public on December 13, 2018. In December 2020, AHFH entered into a new operating lease for a third ReStore location which opened to the public in November 2021. The operating lease for the third ReStore commenced in September 2021.

Future minimum payments under operating leases consisted of the following as of December 31, 2021:

<u>Years Ending December 31,</u>	
2022	\$ 563,600
2023	578,383
2024	594,396
2025	612,869
2026	625,188
Thereafter	<u>2,396,256</u>
	<u>\$ 5,370,692</u>

The Organization also has a noncancelable capital lease agreement for solar panels. Future minimum payments under the capital lease consisted of the following as of December 31, 2021:

<u>Years Ending December 31,</u>	
2022	\$ 41,575
2023	41,575
2024	41,575
2025	<u>38,111</u>
Total minimum lease payments	162,836
Less amount representing interest (3% annually)	<u>(9,347)</u>
Total capital lease obligations	153,489
Less current portion of capital lease obligations	<u>(37,484)</u>
Long term portion of capital lease obligation	<u>\$ 116,005</u>

Note 17—Contingencies

The Organization receives government grants for specific purposes that are subject to review and audit by government agencies. The Organization is also funded by grants and contracts that are subject to review and audit by the grantor agencies. These contracts have certain compliance requirements and, should audits by the government or grantor agencies disclose any areas of substantial noncompliance, the Organization may be required to refund any disallowed costs.

AUSTIN HABITAT FOR HUMANITY, INC.
NOTES TO THE CONSOLIDATED FINANCIAL STATEMENTS

DECEMBER 31, 2021 AND 2020

Note 18—Federal income taxes

The Organization is subject to federal income taxes on unrelated business income, which consists of ReStore sales of purchased materials. As of December 31, 2021 and 2020, the Organization has incurred cumulative net operating losses of approximately \$4,400,000 and \$4,000,000, respectively, for federal income tax purposes. These net operating losses may be used to offset future taxable unrelated business income. If not utilized, approximately \$2,182,000 of these losses will expire beginning in 2027. A full valuation allowance has been recorded as utilization is uncertain. The net change in the total valuation allowance for the years ended December 31, 2021 and 2020 was approximately \$400,000 and \$1,400,000, respectively.

Note 19—Subsequent events

In 2022, the Organization received an unrestricted contribution from Habitat for Humanity International in the amount of \$8,500,000.

SUPPLEMENTARY INFORMATION

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATING SCHEDULE OF FINANCIAL POSITION

DECEMBER 31, 2021

	Austin Habitat for Humanity	Austin Neighborhood Alliance for Habitat, Inc.	HomeBase Texas	Eliminations	Total
ASSETS					
Current Assets:					
Cash and cash equivalents	\$ 7,360,274	\$ -	\$ 434,751	\$ -	\$ 7,795,025
Restricted cash	1,792,129	-	-	-	1,792,129
Accounts receivable	734,482	-	129,178	(540,256)	323,404
Pledges receivable, net	66,550	-	-	-	66,550
Mortgages receivable, current portion, net	767,274	-	-	-	767,274
ReStore inventory	1,659,178	-	-	-	1,659,178
Home construction in progress	856,968	-	-	-	856,968
Prepaid expenses and other current assets	537,367	-	-	-	537,367
Total Current Assets	13,774,222	-	563,929	(540,256)	13,797,895
Land held for development	4,683,150	-	-	-	4,683,150
Land held for sale	1,494,117	-	-	-	1,494,117
Mortgages receivable, long-term portion, net	8,657,287	-	-	-	8,657,287
Notes receivable, 2 nd lien, net	-	-	992,411	-	992,411
Property and equipment, net	10,896,064	-	-	-	10,896,064
Total Assets	\$ 39,504,840	\$ -	\$ 1,556,340	\$ (540,256)	\$ 40,520,924

See report of independent auditor.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATING SCHEDULE OF FINANCIAL POSITION (CONTINUED)

DECEMBER 31, 2021

	Austin Habitat for Humanity	Austin Neighborhood Alliance for Habitat, Inc.	HomeBase Texas	Eliminations	Total
LIABILITIES AND NET ASSETS					
Current Liabilities:					
Accounts payable	\$ 632,459	\$ -	\$ 26,353	\$ -	\$ 658,812
Accrued expenses	1,076,436	-	540,256	(540,256)	1,076,436
Deferred revenue	3,463,671	-	-	-	3,463,671
Capital lease obligation, current portion	37,484	-	-	-	37,484
Notes payable - TDHCA, current portion	109,658	-	-	-	109,658
Long-term debt, current portion	180,325	-	-	-	180,325
Paycheck Protection Program loan	768,200	-	-	-	768,200
Total Current Liabilities	6,268,233	-	566,609	(540,256)	6,294,586
Capital lease obligation, long-term portion	116,005	-	-	-	116,005
Notes payable - TDHCA, long-term portion	1,335,319	-	-	-	1,335,319
Long-term debt, net of debt issuance costs	8,842,541	-	-	-	8,842,541
Total Liabilities	16,562,098	-	566,609	(540,256)	16,588,451
Net Assets:					
Without donor restrictions	22,208,357	-	989,731	-	23,198,088
With donor restrictions	734,385	-	-	-	734,385
Total Net Assets	22,942,742	-	989,731	-	23,932,473
Total Liabilities and Net Assets	\$ 39,504,840	\$ -	\$ 1,556,340	\$ (540,256)	\$ 40,520,924

See report of independent auditor.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATING SCHEDULE OF ACTIVITIES

YEAR ENDED DECEMBER 31, 2021

	Austin Habitat for Humanity	Austin Neighborhood Alliance for Habitat, Inc.	HomeBase Texas	Eliminations	Total
Revenues:					
Contributions and Other Income:					
Contributions	\$ 2,852,532	\$ -	\$ -	\$ -	\$ 2,852,532
Home building sponsorship revenues	2,107,376	-	-	-	2,107,376
Investment income	9,159	-	-	-	9,159
Other income	2,347,498	-	106,327	(189,084)	2,264,741
Total Contributions and Other Income	<u>7,316,565</u>	<u>-</u>	<u>106,327</u>	<u>(189,084)</u>	<u>7,233,808</u>
ReStore Revenues:					
ReStore sales	7,318,500	-	-	-	7,318,500
In-kind donation of inventory	4,022,595	-	-	-	4,022,595
Cost of goods sold	(5,899,306)	-	-	-	(5,899,306)
Sales discounts and refunds	(290,288)	-	-	-	(290,288)
Total ReStore Revenues, net	<u>5,151,501</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>5,151,501</u>
Low-Cost Housing Revenues:					
Home sales	4,699,500	-	-	-	4,699,500
In-kind contributions of labor and construction materials	665,987	-	-	-	665,987
Mortgage discount and amortization	346,487	-	(12,579)	-	333,908
Other housing revenues	-	-	3,510	-	3,510
Cost of homes sold	(5,137,326)	-	-	-	(5,137,326)
Total Low-Cost Housing Revenues, net	<u>574,648</u>	<u>-</u>	<u>(9,069)</u>	<u>-</u>	<u>565,579</u>
Total Revenues	<u>13,042,714</u>	<u>-</u>	<u>97,258</u>	<u>(189,084)</u>	<u>12,950,888</u>

See report of independent auditor.

AUSTIN HABITAT FOR HUMANITY, INC.
CONSOLIDATING SCHEDULE OF ACTIVITIES (CONTINUED)

YEAR ENDED DECEMBER 31, 2021

	Austin Habitat for Humanity	Austin Neighborhood Alliance for Habitat, Inc.	HomeBase Texas	Eliminations	Total
Expenses:					
Low-cost housing program	\$ 2,750,381	\$ -	\$ -	\$ -	\$ 2,750,381
ReStore program	4,766,961	-	-	-	4,766,961
Fundraising	1,264,475	-	-	-	1,264,475
Management and general	972,722	-	193,141	(189,084)	976,779
Total Expenses	<u>9,754,539</u>	<u>-</u>	<u>193,141</u>	<u>(189,084)</u>	<u>9,758,596</u>
Change in net assets	3,288,175	-	(95,883)	-	3,192,292
Transfer of net assets	5,131,316	(5,131,316)	-	-	-
Net assets, beginning of year	<u>14,523,251</u>	<u>5,131,316</u>	<u>1,085,614</u>	<u>-</u>	<u>20,740,181</u>
Net assets, end of year	<u>\$ 22,942,742</u>	<u>\$ -</u>	<u>\$ 989,731</u>	<u>\$ -</u>	<u>\$ 23,932,473</u>

See report of independent auditor.



Application for OHDA Funding – 2023

Tab 3c – Board Resolution

CERTIFICATE OF CORPORATE RESOLUTION

We, Joe Tracy, Chair, and Yvette Boatwright, Secretary, of Austin Habitat for Humanity, a Texas corporation, hereby certify that:

1. Austin Habitat for Humanity is a corporation organized and existing under the laws of the State of Texas;
2. All franchise and other taxes required to maintain the corporate existence of Austin Habitat for Humanity have been paid and no taxes are delinquent;
3. No proceedings are pending for the forfeiture of its certificate of incorporation or for its dissolution, voluntarily or involuntarily;
4. It is in good standing with the State of Texas;
5. There are no provisions in the articles of incorporation or bylaws of this corporation limiting the power of its Board of Directors to pass the resolution set forth below;
6. The Secretary is the keeper of the records and minutes of the corporation and on April 28, 2021, a regular meeting of the Board of Directors was held, which was properly called and held in accordance with the law and with the corporation's bylaws;
7. A quorum of the Board of Directors have consented to the action proposed; and
8. As a result of this affirmative vote, the following resolution was adopted:

BE IT RESOLVED that the Board of Directors of Austin Habitat for Humanity authorizes the Chief Executive Officer or whomever that person deems appropriate at their sole discretion to have the authority to apply for funding from the City of Austin, Housing and Planning Department, for projects to include Persimmon at Meadow Lake, Montopolis Town Homes, and other such projects as support affordable homeownership in the City of Austin.

We certify that the above resolution has not been altered, amended, rescinded or repealed and is now in full force and effect. We also certify that Joe Tracy is the Chair of the corporation and Yvette Boatwright is the Secretary.

Signed on April 30th, 2021 by the Chair ~~and Secretary~~ of the Corporation.



Chair

Secretary

State of Texas
County of Travis

This instrument was acknowledged before me on April 30th, 2021 by Joe Tracy,
Chair of Austin Habitat for Humanity, a corporation, on behalf of said corporation ~~and by Yvette~~
~~Boatwright, Secretary, on behalf of said corporation.~~

Amy Painter Hur



Notary Public State of Texas

CERTIFICATE OF CORPORATE RESOLUTION

We, Joe Tracy, Chair, and Yvette Boatwright, Secretary, of Austin Habitat for Humanity, a Texas corporation, hereby certify that:


1. Austin Habitat for Humanity is a corporation organized and existing under the laws of the State of Texas;
2. All franchise and other taxes required to maintain the corporate existence of Austin Habitat for Humanity have been paid and no taxes are delinquent;
3. No proceedings are pending for the forfeiture of its certificate of incorporation or for its dissolution, voluntarily or involuntarily;
4. It is in good standing with the State of Texas;
5. There are no provisions in the articles of incorporation or bylaws of this corporation limiting the power of its Board of Directors to pass the resolution set forth below;
6. The Secretary is the keeper of the records and minutes of the corporation and on April 28, 2021, a regular meeting of the Board of Directors was held, which was properly called and held in accordance with the law and with the corporation's bylaws;
7. A quorum of the Board of Directors have consented to the action proposed; and
8. As a result of this affirmative vote, the following resolution was adopted:

BE IT RESOLVED that the Board of Directors of Austin Habitat for Humanity authorizes the Chief Executive Officer or whomever that person deems appropriate at their sole discretion to have the authority to apply for funding from the City of Austin, Housing and Planning Department, for projects to include Persimmon at Meadow Lake, Montopolis Town Homes, and other such projects as support affordable homeownership in the City of Austin.

We certify that the above resolution has not been altered, amended, rescinded or repealed and is now in full force and effect. We also certify that Joe Tracy is the Chair of the corporation and Yvette Boatwright is the Secretary.

Signed on 4/30/21, 2021 by the Chair and Secretary of the Corporation.

Chair

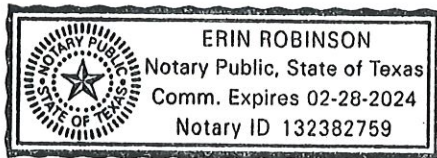


Secretary

State of Texas
County of Travis

This instrument was acknowledged before me on 4/30/2021, 2021 by Joe Tracy,
Chair of Austin Habitat for Humanity, a corporation, on behalf of said corporation and by Yvette
Boatwright, Secretary, on behalf of said corporation.

Erin Robinson



Notary Public State of Texas



Application for OHDA Funding – 2023

Tab 3d – Financial Statements

Please note that because Austin Habitat for Humanity is a nonprofit corporation, we have submitted our audited financials under Tab 3b.



Application for OHDA Funding – 2023

Tab 3e – Funding Commitment Letters

January 20, 2023

Mr. James B. May
Community Development Manager
City of Austin, Housing & Planning Department
1000 East 11th Street
Austin, TX 78702

Dear Mr. May,

On behalf of Austin Habitat for Humanity and the families we serve, thank you for the opportunity to apply for continued support of our Montopolis Townhomes project located at 6301 Círculo de Amistad. We are requesting support for the vertical construction of 12 homes, all of which will be sold at affordable prices to families earning up to 80% of the Median Family Income for the area.

With respect to the commitment letters to be attached to this proposal, Austin Habitat has received previous funding from the City of Austin (\$277,610 and \$294,000). We also have a committed sponsorship from Realty Austin (\$50,000) to support Fall 2023 builds, as well as probable support from the following ongoing funders, with whom we are currently discussing 2023 sponsorship opportunities:

- Wells Fargo (provided \$80,000 in 2022)
- Bank of America (provided \$65,000 in 2022)
- Harry E. and Eda L. Montandon Charitable Trust (provided \$40,000 in 2022)
- National Instruments (provided \$35,000 in 2022)
- Silicon Labs (provided \$25,000 in 2022)
- University Federal Credit Union (provided \$25,000 in 2022)
- Other funders in \$5,000-25,000 range, can be provided upon request

The timing of this support is unique to Habitat, as these funds are sought only when build opportunities are imminent. Our sponsors generally do not make funding commitments more than a few months before they are planning to volunteer onsite, so we do not request funds for sites that are not already underway.

We welcome any questions on the Habitat model and its relationship to the work supported by this proposal, and thank you and the City for the continued support.

In Partnership,



Phyllis Snodgrass
Chief Executive Officer

Board Members

Yvette Flores, *Chair* | Mason Ayer | Bob Barnes | A.J. Bingham | Joe Bland | Kevin Cunningham |
Lauren Dupuis | Tami Garcia | John Garrett | Melinda Garvey | Larry Graham | Dr. Rev. Daryl Horton |
Phil Hutchinson | Dana Leaman | Robert Lee | Ryan Mattox | Nikelle Meade | Abby Mellott | Terry Mitchell |
Jessica Nelson | Mia Parton | Kazique Prince | Cynthea Rhodes-Patterson | Ross Sabolicik |
Neha Sampat | Charmane Sellers | Shelli Taylor | Alex Shin Valdes | Laura Touns

500 W Ben White Blvd, Austin, TX 78704
512-472-8788 | austinhabitat.org

**We build homes,
communities and hope.**



Application for OHDA Funding – 2023

Tab 4 – Project Information



Application for OHDA Funding – 2023

Tab 4a – Market Information



Internal Market Assessment for Montopolis: 2023

Pricing and Absorption

All Habitat homes, including those at Montopolis, are priced to be affordable to homeowners who are low-income, with incomes at or below 80% of the Median Family Income (MFI) for the Austin-Round Rock Metropolitan Statistical Area (MSA). Based on current estimates, the sale prices for our partner families will be as follows:

- Six two-bedroom units (approximately 1,104 square feet) to be sold for \$145,000; four three-bedroom units (approximately 1,300 square feet) to be sold for \$180,000; and two four-bedroom units (approximately 1,662 square feet) to be sold for \$200,000

Although these prices are estimated, Austin Habitat plans to keep all units affordable and will continue to structure each mortgage to avoid cost burden and empower our hardworking clients to use their earnings to reach additional successes. Austin Habitat broke ground on this site in 2022 and will begin vertical construction of this 12-unit development in 2023, expecting to build four homes in 2023 and eight in 2024.

Austin Habitat has traditionally maintained an interest/waiting list of potential homebuyers, and makes property available to each potential homeowner as they complete their qualification requirements and as the homes are built. We receive more than 1,500 calls each year from individuals and families interested in homeownership, although many of these families do not wind up being qualified for our program because we are careful to only accept families we believe will be able to succeed as homeowners (after working with our team).

For the Montopolis Townhomes and other 2023-24 home builds, we are launching a marketing campaign including affirmative marketing to underserved local populations. We are beginning to work with families who may be qualified for Montopolis and have a number of families completing qualification to select their homes in this development for the Fall 2023 build. We are also working to begin qualifying additional families for 2024.

Community Conditions

Target Population: Although each development attracts a different mix of partner families, we still expect that our clients will fit the Habitat "profile" in several important ways:

- Income eligibility, with a household income at or below 80% of the Median Family Income (MFI) for the Austin-Round Rock Metropolitan Statistical Area (MSA).
- Ability to make a \$3,000 up-front contribution and continue to pay the mortgage on an ongoing basis. Austin Habitat's HUD-certified housing counselors work extensively with each potential homebuyer to eliminate debt, credit issues, and other barriers to successful homeownership before qualifying them to purchase a Habitat home.
- Willingness to partner in Habitat activities. All potential Habitat homeowners must complete sweat equity which includes undergoing financial counseling as well as volunteering. Currently, the sweat equity requirement is 200 hours. Most of our homebuying families work on our build sites, helping to create their neighbors' homes and then their own home, which not only creates an investment in the future but helps

families support each other as neighbors. The Montopolis Townhomes will have many volunteer opportunities, and we expect our partner families to be onsite along with sponsor groups, faith groups and other volunteers.

- Willingness to partner also includes an agreement to participate in ongoing Habitat activities, including appearing at the wall raising and home dedication with sponsors and Habitat leadership, consenting to the use of their photo and story in Habitat's outreach materials, and remaining in contact with Habitat for future partnership activities and impact evaluation.

Other than these requirements, Austin Habitat does not seek a specific target population or set additional eligibility requirements for the Affordable Homeownership Program, and all program guidelines comply with applicable laws, such as the Fair Housing Act. We find that our program participants are primarily families of color, mostly Black and Hispanic/Latino; about half are families headed by single mothers or other female heads of household, both populations that tend to earn lower wages and have faced additional barriers to safe, stable, affordable housing.

Area Demographics

Census Tract 23.12, which encompasses the Montopolis/Círculo de Amistad development, has a total population of 8,590.

- Age: 33% are young people age 19 or younger (20% are young children under age 9); 8.5% are seniors age 60 and older; the remaining 58.5% are adults age 20-64.
- Gender: 50.3% male; 49.7% female
- Race/Ethnicity: 70% Hispanic/Latino; 20% White (not Hispanic); 8% Black/African-American; 1% Asian, 1% multi-racial.
- Language spoken at home: approximately 60% of the residents of this Census tract speak Spanish at home. About 30% of the population is foreign-born, primarily from Latin American countries.
- Disability Status: Approximately 12.6% of the population of this Census tract has a disability.
- Poverty: The poverty rate in Census Tract 23.12 is 26.4%, compared with approximately 15% county-wide. About 30% of the area's children are in poverty, and more than 46% of families with children from birth to age 17.
- Income: The MFI in this census tract is \$42,344, less than 60% of the newly-released MFI for the Austin-Round Rock Metropolitan Statistical area. Fifty-four percent of families in this Census tract have a family income of less than \$50,000 per year.
- Employment: 67.9% of individuals age 16 and older in this census tract are in the labor force. The unemployment rate for the Census tract was 11.4% in the most recent American Community Survey by tract (pre-pandemic); the Austin-Round Rock Metropolitan Area overall has an unemployment rate of 2.8%.
- Healthcare: Approximately 21.1% of residents of this Census tract are uninsured.
- Educational Attainment: Only 18% of the adult residents of this Census tract have a college degree; nearly 40% do not have a high school diploma.

All data from the U.S. Census, 2019 5-Year American Community Survey (ACS) Estimates, other than the unemployment rate (U.S. Department of Labor, Bureau of Labor Statistics). Please note that the Census has not released ACS for 2020 or 2021 by census tract.

Overall Local Housing Conditions and Trends

Census Tract 23.12 contains 2,676 total housing units, of which 5% are vacant.

- Approximately 45% of the homes in this census tract are detached one-story properties. Thirty-seven percent are multi-unit, although almost all are larger rental buildings, and 14% are mobile/manufactured homes. Only 50 (1.8%) are 2-4 bedrooms, and most are likely rental units.
- More than half of the homes in this Census tract are older, with approximately 51% having been built in 1999 or earlier.
- Approximately 40% of the housing units in this Census tract are owner-occupied; 60% are occupied by renters.
- Nearly one-half (47.7%) of the households in this Census tract are considered cost-burdened by housing, paying 30% or more of their monthly income for housing costs. Of households earning less than \$75,000 annually, 62% are cost-burdened.
- The median home value in this Census tract is \$155,000, less than half of the median home value for the rest of Austin.

All data is sourced from the United States Census, 2019 5-Year American Community Survey.

General Community Housing Conditions

The Austin area has been one of the fastest-growing in the nation, with new residents bringing skilled jobs, substantial intellectual and social capital, and enhanced innovation and creativity. Families in the area have benefited from the area's growth, but many find themselves being pushed out by the housing market, which soared to unaffordable levels over the past several years. Hardworking families all over the region have been taking second jobs, creating side businesses, and otherwise overextending themselves just to pay rent, but have been forced to live in substandard conditions and move frequently due to rent increases, disrupting employment and education.

The cost of home has more than doubled in the past 10 years, with the median cost of a home in the City of Austin now standing at \$525,250.¹ Although the median home price in Austin has come down somewhat from its peak of over \$600,000,² almost all homes are still unaffordable for most local families. The median income needed to purchase a home in the Austin-Round Rock MSA is more than \$165,000,³ much higher than the median household income in the area. In Austin, the median household income for all families is about \$80,000,⁴ not enough to buy most homes on the market; Black and Latino/Hispanic families have incomes one-quarter to one-third lower and are even less likely to be able to afford to purchase a high-quality home here.⁵ This market takes the American Dream even farther out of reach for populations that have been systematically oppressed and excluded from homeownership due to racist policies. Most lower-income families must rely on rental housing, but this comes with its own set of concerns. Rent nearly doubled from 2010-2019⁶ and increased 45% from November 2020 to November 2021, with an average rental of \$2,690 per month.⁷ In Texas, more than 46% of renters are cost-burdened, and nearly 23% are severely cost-burdened, both having risen

¹ <https://www.abor.com/december-2022-central-texas-housing-market-report>

² <https://www.abor.com/march-2022-central-texas-housing-market-report>

³ <https://www.jchs.harvard.edu/son-2022-affordability>

⁴ <https://www.census.gov/quickfacts/austincitytexas>

⁵ <https://statisticalatlas.com/place/Texas/Austin/Household-Income>

⁶ <https://www.zillow.com/research/total-rent-paid-2010-2019-26112/>

⁷ <https://dwellsy.com/blog/rent-price-data/>

during the pandemic.⁸ More than 80% of Austin-area renters earning 30-50% MFI and 46% of renters at 51-80% MFI are cost-burdened by housing, spending at least 30% of their monthly income on housing costs.⁹ Families who rent are also unable to build wealth through their home equity; they may be subject to frequent rent increases, leading to moves that disrupt education and employment; and they are dependent on landlords to provide repairs and mitigate any issues that arise in the home. Hundreds of families reach out to us every year who are stuck in unsafe, unstable, health-harming, or otherwise difficult housing situations because they cannot afford a home of their own.

Austin Habitat's team recognizes that more families than ever are falling behind on their dreams – not just homeownership, but education, wealth-building, health and more. We are working through multiple channels to increase opportunity for families in need, but we recognize that the need is only going to continue to grow because of a “perfect storm” of conditions creating unaffordability in the area:

- Cost of land doubled in Austin-Round Rock MSA from 2012-18, from \$74,100 per ¼ acre (\$296,400 per acre) to \$147,600 per ¼ acre (\$590,400 per acre). Land cost makes up a 38% share of the value of the property.¹⁰
- Home price to median income ratio for Austin-Round Rock MSA rose from 2.38 in 1990 to 5.8 in 2021.¹¹
- Rent in the Austin area increased 24.9% in 2021.¹²
- The region's population has grown by 10% while housing has only grown by 3%.¹³
- Austin's Land Development Code (LDC) had its last significant revision in the 1980s. Current zoning and other rules are designed for a smaller and less rapidly growing city, with requirements for large amounts of square footage per unit; requirements for large numbers of parking spaces; and building height restrictions.

Right now, our Affordable Homeownership Program primarily builds and sells new homes in the Austin area, as well as working with private developers to increase access to affordable housing. Most builds are accomplished primarily through volunteer labor, including the families who perform “sweat equity” to qualify for their home. While this model has been successful, we understand that the skyrocketing home prices in the area, rapidly increasing price of land, and economic changes will require us to innovate. We have responded by building relationships with private developers, designing innovative multifamily housing models, and updating our business processes. For example, we are working with two sets of developers in Bastrop County immediately outside Austin to provide large numbers of homes over the next several years. We also have allocated several large funding awards specifically for land acquisition and hired an acquisition specialist to work on our Real Estate team.

Geographic Area for Potential Homeowners

Please note that while Austin Habitat is happy to welcome individuals and families already living in the area to purchase in the Montopolis Townhomes development, particularly given the rapid gentrification of this area, we do not require potential homebuyers to live near the development in which they wind up purchasing. Austin Habitat works with potential homebuyers from

⁸ <https://www.jchs.harvard.edu/son-2022-cost-burdens>

⁹ <https://reports.nlihc.org/gap/2019/tx>

¹⁰ <https://www.jchs.harvard.edu/state-nations-housing-2021> This was not updated for 2022.

¹¹ <https://www.jchs.harvard.edu/state-nations-housing-2022>

¹² See note 10.

¹³ <https://www.austincf.org/wp-content/uploads/2020/01/WomensIssuesareCommunityIssues.pdf>

throughout the Austin area, and all potential buyers are informed that they may need to move from their current neighborhood to another area with a Habitat development if they are approved to purchase a home. We will work with our partner affordable housing organizations to ensure that neighborhood residents are informed of the availability of these units.

Eligible Homeowner Pool Demographics

The potential homeowners qualified to purchase in Habitat developments – 27 families with a total of 82 members, as of January 2023 – have the following demographic profile:

- 74% low-income (80% or less of local MFI – please note we are qualifying families up to 120% for certain partnership developments)
- 56% Hispanic/Latino
- 3% female-headed households
- 11% identified as having a disability

Competitive Properties

Although this area is one of the more reasonably-priced parts of Austin, most of the homes in the immediate area would still be out of reach or not suitable for our client population. As of January 2023, a search of Zillow.com shows only 18 available properties listed for under \$300,000 in the 78741 zip code and the five most immediately contiguous zip codes (78702, 78704, 78742, 78744 and 78745), not including vacant lots and manufactured home lots. There were more than 60 available properties in January 2020, showing the compaction of the local housing market. Most of the lower-priced properties that are currently available in this radius are very small townhomes or condominiums (800 square feet or less) that would not be appropriate for most Habitat partner families, or properties that require significant renovation/remodeling that would considerably increase cost to the buyer.

In addition, none of the properties have the Habitat for Humanity advantage, including intensive financial and housing education and counseling; in-house mortgage qualification using Habitat standards, which provide access for families who would not always qualify for traditional mortgages, after barriers to homeownership success are overcome; access to preferred lending rates and lower-cost purchase; referral to additional services as needed; and ongoing post-purchase support to avoid mortgage delinquency.

Austin Habitat for Humanity builds throughout the City and the area, and we are confident that our affordable homeownership development is appropriately sited in this neighborhood:

- Austin Habitat has previously built the Lee Meadows and Mary Vice Estates developments with City funding in this area, where homeowners and their families have lived and thrived for more than 20 years.
- Our team has helped numerous families improve their lives through safe, stable housing, including families in this area and throughout the region, including low-income rural areas outside of Austin and other areas with considerable challenges. We believe
- that the community need in this neighborhood is strong and that affordable homes are one of the many benefits that can be offered in this community to improve stability.
- Because Austin Habitat works with each family who eventually purchases a home, sometimes over a period of years, to improve their financial situation until there is a strong likelihood of successful homeownership, we have a strong track record of succeeding with families that would otherwise not be considered for homeownership.

- Austin Habitat is in possession of this tract of land and has sought the right opportunity to develop it into affordable homesites. We believe that this is the time, as housing affordability and land affordability continue to decrease, and we have worked with in-house and outside architects, engineers and designers to maximize the affordable housing units to be built on this small site.

Market Demand

As discussed above, Austin Habitat maintains an interest/waiting list of eligible potential purchasers for all properties sold through the Affordable Homeownership Program, including ongoing builds at Scenic Point and Loyola, the upcoming 126-unit Persimmon development, and the Montopolis site. Currently, this interest list contains 27 fully qualified families representing 82 individuals. In addition, in the past year Habitat has heard from more than 1,500 community members who have contacted us to sign up for workshops or receive more information about affordable homeownership. We are also creating a marketing campaign for all of our upcoming builds, including the Montopolis Townhomes, to ensure that we have an ongoing pipeline of qualified applicants for these homes and the others we are building in 2023 and beyond.

Demand and Capture

Twelve units will be built in the Montopolis development, and the Austin Habitat Affordable Homeownership Program currently has approximately 30 potential homebuyers in the process of qualifying to purchase a home and working on sweat equity. Although some may not qualify and some will be placed in other Austin Habitat homes, we expect that the demand for affordable homeownership will continue to rise as the costs of housing in the area remain unaffordable. As mentioned above, not all of the potential homebuyers for any of our developments, are currently living in close geographic proximity to the area, but all are committed to purchasing a Habitat home.

Austin Habitat is not yet able to calculate a capture rate for the Montopolis development because we are only in the early stages of clients for this property, but we expect to have enough qualified families to start pairing families with Montopolis homes for the Fall. Austin Habitat also continues to offer qualified individuals/families the opportunity to purchase a home at several other developments that are currently being built or are in pre-development in Austin. Therefore, we are able to offer housing to individuals and families on the waiting list who do not wind up living in this development.

Absorption Period

Austin Habitat expects to sell the 12 units to be created in the Montopolis development in 12-24 months. As our Affordable Homeownership Program is designed to produce completed properties and purchase-ready families concurrently, we expect to match families with these units by the time they are ready for occupancy. Our Client Services, Communications, and other teams are working together to identify the people and families who would be qualified to purchase and would benefit from the strong access to jobs and transit and develop strong outreach plans designed to attract these populations.



Application for OHDA Funding – 2023

Tab 4b – Good Neighbor

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. See application cover sheet and name below.

(4) Application requirements

- Provide communications plan Example of Communications Plan attached.
- 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



SATURDAY, 6/17/2017, 9:00 AM **OPEN AREA NEAR MAILBOXES** **MARY VICE ESTATES** **NEIGHBORHOOD MEETING**

New Austin Habitat for Humanity Community

Austin Habitat for Humanity is excited to finally be developing the property located at the corner of Montopolis Drive and Circulo de Amistad. We are interested in building around a dozen affordable townhomes. Please attend this neighborhood meeting to learn more and share your thoughts. We will meet at the open space near the mailboxes and enjoy breakfast tacos!



Join us!

Affordable Homes

Montopolis

**Come hear about
what we are
planning to build!**

**AUSTIN HABITAT FOR
HUMANITY**

512-472-8788

www.austinhabitat.org

Saturday, June 17, 2017
9:00 AM



SÁBADO, 17/6/2017, 9:00 AM ÁREA ABIERTA CERCA DE BUZONES MARY VICE ESTATE REUNIÓN DE VECINDARIO

Nueva Comunidad de Austin Habitat for Humanity

Austin Habitat for Humanity está feliz por finalmente desarrollar la propiedad ubicada en la esquina de Montopolis Drive y Círculo de Amistad. Estamos interesados en la construcción de una docena de viviendas asequibles. Por favor, asista a esta reunión de vecindario para aprender más y compartir sus criterios. ¡Nos reuniremos en el espacio abierto cerca de los buzones y disfrutaremos de un desayuno de tacos!



¡Únete a nosotros!

**Viviendas
Económicamente
Accesibles**

Montopolis

**¡Ven a escuchar lo
que estamos
planeando
construir!**

**AUSTIN HABITAT FOR
HUMANITY**

512-472-8788

www.austinhabitat.org

Sábado, 17 Junio 2017
9:00 AM



COMMUNITY MEETING NOTICE

August 28, 2018

The City of Austin, Planning and Zoning Department, has received an application for a neighborhood plan amendment and zoning change for property located within the **Montopolis Neighborhood Planning Area**. See enclosed maps for location. You received this notice because you live or own property within 500 feet of the property, or are a member of the planning contact team or a member of a registered neighborhood organization or environmental group who requested notification for the area.

Plan Amendment Case #: NPA-2018-0005.02

Address: 6301/ 6307 1/2 Circulo de Amistad

Zoning Case #: C814-97-0002.01

For more information on this case, you can go to the city's website at <https://abc.austintexas.gov/web/permit/public-search-other>.

Si necesita más información en español sobre esta reunión del vecindario de Montopolis Neighborhood Planning Area, favor de llamar a Debbie Valero a (512) 974-3531 or at Debbie.valero@austintexas.gov.

Thursday, September 13, 2018

6:30 p.m.—8:00 p.m.

Ruiz Public Library, Room 1

1600 Grove Blvd.

PURPOSE OF MEETING:

The City of Austin is sponsoring this community meeting to provide an opportunity for the applicants, neighborhood planning contact team, nearby residents/property owners and any other interested parties to discuss the proposed plan amendment and zoning change requests.

CASE SUMMARIES:

NPA-2018-0005.02—The applicant proposes to change the land use on the Future Land Use Map (FLUM) map from **Commercial** to **Mixed Use**.

C814-97-0002.01— The applicant proposes to amend the Planned United Development (PUD) to increase the allowable maximum building square footage from 6,000 sq. ft. to 30,000 sq. ft. To reduce the building setback from 25' to 15' along Montopolis Drive and Circulo de Amistad and to 10 ft. along the rear and side property lines; and to add residential uses Townhomes/Condos/Duplex on Area 1 within the PUD. See details on back of notice.

STAFF CONTACT

Please contact Maureen Meredith at 512-974-2695 or by e-mail at

Maureen.Meredith@austintexas.gov with any questions.

Office hours are Monday-Friday 8:00 am-5:00 pm.

The **NEIGHBORHOOD PLAN** and **Future Land Use Map** can be viewed at:
<http://austintexas.gov/page/neighborhood-planning-areas>.

APPLICATION PROCESS

After the community meeting is held, the proposed cases will be reviewed and acted upon at two public hearings, first by the Planning Commission and then by the City Council. The Planning Commission will make a recommendation and the City Council will make the final decision to approve or deny the request, or to approve an alternative to the changes requested. The public will be provided an opportunity to comment on the proposed plan amendment and zoning case at both public hearings. You will receive public hearing notice(s) in the mail stating the date, time, and location of these public hearings.

LAND USE DESCRIPTIONS

Existing Land Use: Commercial—Lots or parcels containing retail sales, services, hotel/motels and all recreational services that are predominantly privately owned and operated for profit (for example, theaters and bowling alleys). Included are private institutional uses (convalescent homes and rest homes in which medical or surgical services are not a main function of the institution), but not hospitals services that are predominantly privately owned and operated for profit (for example, theaters and bowling alleys). Included are private institutional uses (convalescent homes and rest homes in which medical or surgical services are not a main function of the institution), but not hospitals.

Proposed Land Use: Mixed Use—An area that is appropriate for a mix of residential and non-residential uses.

C814-97-0002.01 Planned Unit Development

EXISTING:

Max. Sq. Ft. Bldg—6,000 sq. ft.
 Min. Setback—25 ft.
 Max. Height—40 ft.
Residential Uses: Accessory Dwelling Unit, Multifamily Low Density
Commercial Uses: Administrative and Business Uses, Art and Craft Studio (General), Art and Craft Studio (Limited), Business Support Services, Communications Services, Financial Services, Medical Offices, Personal Services, Professional Office, Software Development
Civic Uses: Administrative Services, Club or Lodge, Day Care Services (Commercial), Day Care Services (General), Day Care Services (Limited)
Industrial Uses: None.
Agricultural Uses: None.

C814-97-0002.01 Planned Unit Development

PROPOSED:

Max. Sq. Ft. Bldg—30,000 sq. ft.
 Min. Setback—15 ft. along Montopolis Dr. and Circulo de Amistad and 10 ft. along the rear and side property lines
 Max. Height—40 ft.
Residential Uses: Accessory Dwelling Unit, Multifamily Low Density and Townhome/Condo/Duplex
Commercial Uses: Administrative and Business Uses, Art and Craft Studio (General), Art and Craft Studio (Limited), Business Support Services, Communications Services, Financial Services, Medical Offices, Personal Services, Professional Office, Software Development
Civic Uses: Administrative Services, Club or Lodge, Day Care Services (Commercial), Day Care Services (General), Day Care Services (Limited)
Industrial Uses: None.
Agricultural Uses: None.

The City of Austin is committed to compliance with the Americans with Disabilities Act. Reasonable modifications and equal access to communications will be provided upon request. Please call (512) 974-2210 or TDD/TTY users route through 711. For Sign Language Interpreter or Braille requests, please call at least 4-5 days in advance of the meeting.

La Ciudad de Austin se compromete a cumplir con el Decreto de los Americanos Incapacitados. Con solo solicitarlo se proveerán modificaciones e igual acceso a comunicaciones. Para informacion favor de llamar a (512) 974-2210 o TDD 711. Para un intérprete del lenguaje de señales o solicitudes de Braille, por favor, nos llame 4 a 5 días antes de la reunión.





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Proposed Land Use: Mixed Use—An area that is appropriate for a mix of residential and non-residential uses.

C814-97-0002.01 Planned Unit Development

EXISTING:

Max. Sq. Ft. Bldg—6,000 sq. ft.

Min. Setback—25 ft.

Max. Height—40 ft.

Residential Uses: Accessory Dwelling Unit, Multifamily Low Density

Commercial Uses: Administrative and Business Uses, Art and Craft Studio (General), Art and Craft Studio (Limited), Business Support Services, Communications Services, Financial Services, Medical Offices, Personal Services, Professional Office, Software Development

Civic Uses: Administrative Services, Club or Lodge, Day Care Services (Commercial), Day Care Services (General), Day Care Services (Limited)

Industrial Uses: None.

Agricultural Uses: None.

C814-97-0002.01 Planned Unit Development

PROPOSED:

Max. Sq. Ft. Bldg—30,000 sq. ft.

Min. Setback—15 ft. along Montopolis Dr. and Circulo de Amistad and 10 ft. along the rear and side property lines

Max. Height—40 ft.

Residential Uses: Accessory Dwelling Unit, Multifamily Low Density and Townhome/Condo/Duplex

Commercial Uses: Administrative and Business Uses, Art and Craft Studio (General), Art and Craft Studio (Limited), Business Support Services, Communications Services, Financial Services, Medical Offices, Personal Services, Professional Office, Software Development

Civic Uses: Administrative Services, Club or Lodge, Day Care Services (Commercial), Day Care Services (General), Day Care Services (Limited)

Industrial Uses: None.

Agricultural Uses: None.

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NOTICE OF FILING OF APPLICATION FOR A NEIGHBORHOOD PLAN AMENDMENT

Mailing Date: August 15, 2018

Case Number: NPA-2018-0005.02

Este aviso es para informarle que hemos recibido una solicitud tocante a un cambio en el uso de la tierra indicado así abajo. Si usted desea recibir información en español por favor llame al (512) 974-3531.

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

If you have any questions concerning this application, please contact the case manager, Maureen Meredith at 512-974-2695, or Maureen.Meredith@austintexas.gov, please reference the Case Number at the top right of this notice. You may also find information on this case at our web site: <https://abc.austintexas.gov/web/permit/public-search-other>.

AGENT:	Husch Blackwell LLP, Stacey L Milazzo, (512) 370-3441
OWNER/APPLICANT:	Habitat for Humanity, Andy Alarcon, Director of Real Estate Development, (512) 472-8788 ext. 247
LOCATION:	6301 CIRCULO DE AMISTAD

AMENDMENT REQUEST: To change the future land use designation for the specified properties within the Montopolis Neighborhood Plan from **Commercial** to **Mixed Use**.

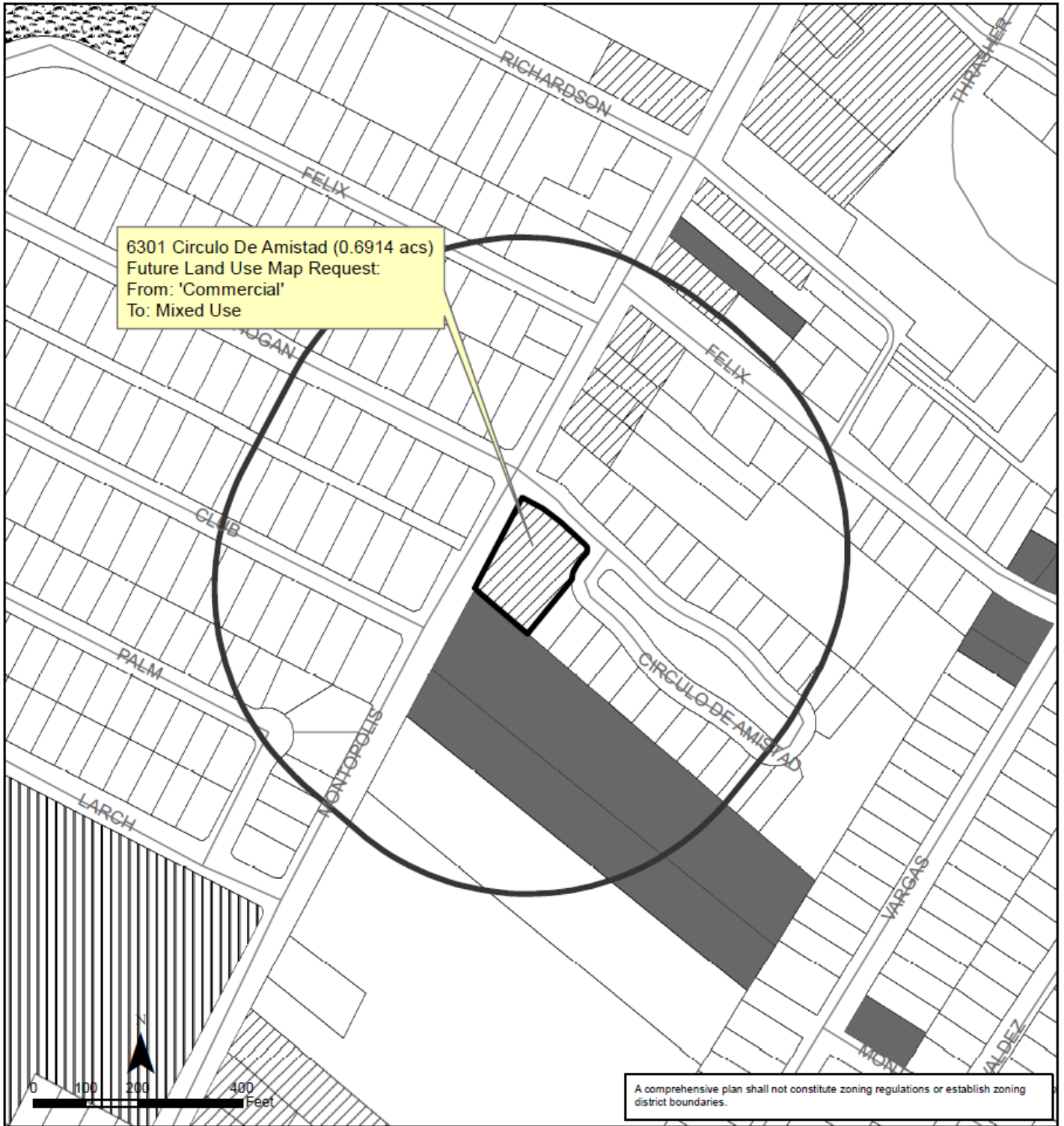
LAND USE DEFINITIONS:

Commercial- Lots or parcels containing retail sales, services, hotel/motels and all recreational services that are predominantly privately owned and operated for profit (for example, theaters and bowling alleys). Included are private institutional uses (convalescent homes and rest homes in which medical or surgical services are not a main function of the institution), but not hospitals.

Mixed Use - An area that is appropriate for a mix of residential and non-residential uses.

The amendment of a neighborhood plan requires a recommendation by the Planning Commission and final approval by the City Council. When scheduled, you will receive a notice for each public hearing which will provide the date, time, and location of the public hearing. You are encouraged to participate in this process.

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



Montopolis Neighborhood Planning Area NPA-2018-0005.02

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 Planning and Zoning Department for the sole purpose of geographic reference. No warranty is made by the City of Austin regarding specific accuracy or completeness.

Future Land Use					
	500 ft. notif. boundary		Subject Property		Mixed Use
	Single-Family		Mixed Use/Office		Civic
	Multi-Family		Recreation & Open Space		
	Commercial				

Name	eMail
MARY SODAY	marysoday@yahoo.com
Judy Villalpando	Judy Villalpando@gmail.com
Sanjuana Pruneda	
Carol Mendez De la Cruz	CJM560@yahoo.com
JOHNNIE CASSITY	CASSITY717@gmail.com
Alex Duarte	alduartejr@gmail.com ^{Sta. 826-6708}
Jesse Mendietz	JSMendietz@gmail.com
Adele Hauser	adele.hauser@gmail.com
Maggie Fonseca	magfon75@aol.com
Ana & Zelaida Figueroa	
Linda C. Curry	Lccurry16@gmail.com
Emelisa Jimenez	
Nemoria Jimenez	
Melissa Mendoza	meli_728@hotmail.com

Pull sidewalk on Mont "not enough homes for light

A/D visit - need light

HOA possibilities?

PPM yelling up + down Mont.

Green space / vegetation

"Y'all give us an opportunity to have a home, we should give them an opp. I'm all for it"

Taxes increasing!

Traffic concerns!

Mary L. Sedqy

6616 Círculo De Amistad, Austin, TX 78741
Cell: (512) 809-9456 – marysedqy@yahoo.com

July 24, 2017

Susana Almanza and the Montopolis Neighborhood Plan Contact Team

Dear Susana and Contact Team Members,

I am pleased to let you know that we, the neighbors of Mary Vice Estates neighborhood, support the plan of Austin Habitat for Humanity of developing the property located at the corner of Montopolis Drive and Círculo de Amistad. AHFH engaged in outreach to our community in person and through the mail inviting all our neighbors to a breakfast meeting at Círculo de Amistad on June 17 to share their vision of building around a dozen affordable townhomes.

We appreciate the fact that Habitat involved us with the possible new plans for the front lot, as well as listened to all our considerations, specifically with respect to the growing traffic and the impact on property taxes. Habitat will be talking to the City Transportation Department about how best to manage the traffic at busy times given that our neighborhood is locked to that one entry onto Montopolis. Property taxes are addressed already through Habitat deed restriction. While Habitat will take into account our feedback into their design, we approve Habitat's requests for smaller setbacks and increased buildable area.

We strongly believe that our community as a whole is made better by the works of AHFH, which has a deep and committed history in Montopolis. As I said before, we happily back the needed request to get more desperately needed affordable homes on Habitat's well-located parcel of land along Montopolis. Certainly, this will be very positive for our neighborhood.

Sincerely,

Mary L. Sedqy
Coordinator of Mary Vice Estates Neighborhood



Application for OHDA Funding – 2023

Tab 4c – S.M.A.R.T. Housing

City of Austin

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

Housing and Planning Department



January 3, 2023 (Update to letter dated December 18, 2019)

S.M.A.R.T. Housing Certification
Austin Habitat for Humanity
6301 Circulo de Amistad (ID#286)

TO WHOM IT MAY CONCERN:

Austin Habitat for Humanity - (development contact: Andy Alarcón: 512.472.8788x247 (o); aaalcon@ahfh.org) is planning to develop **6 duplexes, 12-units**, ownership development at 6301 Circulo de Amistad, Mary Vice Estates P.U.D, Commercial Site Area 1. The project will be subject to a 99-year affordability period.

The Housing and Planning Department (HPD) certifies that the proposed construction meets the S.M.A.R.T. Housing standards at the pre-submittal stage. Since that 100% of the units of this project will serve households at 80% MFI, the development will be eligible for a **100%** waiver of the fees listed in Exhibit A of the S.M.A.R.T. Housing Resolution adopted by the City Council.

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

Prior to issuance of building permits and starting construction, the developer must:

- ◆ Obtain a signed Conditional Approval from the Austin Energy Green Building Program stating that the plans and specifications for the proposed development meet the criteria for a Green Building Rating. (Contact Austin Energy Green Building: 512-482-5300 or greenbuilding@austinenergy.com).
- ◆ Submit plans demonstrating compliance with the required accessibility or visitability standards.

Before a Certificate of Occupancy will be granted, 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).
- ◆ Pass a final inspection to certify that accessibility standards have been met.
- ◆ An administrative hold will be placed on the building permit, until the following items have been completed: 1) the number of affordable units have been finalized and evidenced through a sealed letter from project architect and/or engineer, 2) a Restrictive Covenant stating the affordability requirements and terms has been filed for record at the Travis County Clerk Office

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 by phone 512.978.1594 or by email to Brendan.kennedy@austintexas.gov if you need additional information.

Sincerely,

Brendan Kennedy

Brendan Kennedy, Senior Planner
Housing and Planning Department

Cc: Kristin Martinez, AE Jonathan Orenstein, AWU Mashell Smith, ORS



Application for OHDA Funding – 2023

Tab 4d – MOU with ECHO

Please note that because Austin Habitat for Humanity does not proposed to provide any continuum of care or other homeless services, we have not obtained an MOU with ECHO.



Application for OHDA Funding – 2023

Tab 4e – Resident Services

AUSTIN HABITAT FOR HUMANITY

APPLICATION FOR OWNERSHIP HOUSING DEVELOPMENT ASSISTANCE (OHDA) - 2023

RESIDENT SERVICES

Habitat for Humanity provides supportive services to all potential homebuyers in the Affordable Homeownership Program and the general public through our Housing Counseling Program. All buyers for the Montopolis Townhomes will take part in this program to ensure they are ready to purchase and successfully maintain a home.

Austin Habitat offers group workshops and one-on-one financial counseling through an in-house program. We have been certified as a Comprehensive Housing Counseling agency by the U.S. Department of Housing and Urban Development (HUD) since 2010 and we employ two HUD-trained, Spanish bilingual counselors. We were recently recertified by HUD through 2025.

Austin Habitat's Housing Counseling Program is designed to assist participants in obtaining and maintaining stable housing, including through Habitat's homebuying program. In addition, the program supports low-to-moderate income community members who are not planning to purchase a Habitat home; they may have a goal of homeownership but also may be working towards another goal like improved credit and savings. All services are provided with no cost or with a nominal cost for credit reports, to Habitat clients and the public, in English and Spanish.

Approximately 800 households receive these supportive services annually, and we expect these numbers to continue to increase as we add home builds and partnerships.

For families who do wish to buy a home from Austin Habitat, they are required to attend both workshops and counseling sessions, which are counted toward their sweat equity requirement. Each family who joins our program receives a personalized assessment of their financial situation with specific steps outlined to meet their goal of successful purchase of a Habitat home and ongoing homeownership success.

Austin Habitat's benefit to Habitat homeowners does not end when the family purchases their home. We hold the mortgages for more than 260 of our homeowners and are able to assist if they face unexpected difficulties and fall behind on their mortgages, providing forbearance as needed. (We have now changed to a third-party lending model, working exclusively with lenders that offer discounted interest rates to our purchasers. This allows us to immediately apply the purchase price of each home to ongoing building projects.)

The total cost of providing the Housing Counseling Program to all participants is approximately \$258,000 annually. Austin Habitat continues to build the funding base for Housing Counseling services, receiving its first Housing Counseling grant from HUD in 2018. We have continued to receive funding from HUD, and the program is also supported by the Texas Department of Housing and Community Development, the City of San Marcos, Capital One, Independent Financial, Shield-Ayres Foundation, the Texas Association of Realtors Housing Opportunity Foundation, and State Farm. We continue to diversify our support through foundation, government and corporate sources. In addition, the program is supported by unrestricted organizational funds from our ReStores, allowing us to cover operational costs for Housing Counseling and our other community programs.



Application for OHDA Funding – 2023

Tab 5 – Property Information



Application for OHDA Funding – 2023

Tab 5a – Appraisal

Removed from website copy of proposal due to file size. This document is available with full proposal.



Application for OHDA Funding – 2023

Tab 5b – Property Maps



6301 CIRCULO DE AMISTAD, X

Show search results for 630...

Legend

High Opportunity



Emerging Opportunity



Search result

6301 CIRCULO DE AMISTAD, AUSTIN, TX, 78741

[Zoom to](#)



6301 CIRCULO DE AMISTAD, X 🔍

Show search results for 630...



Legend - X

Gentrification_RHDAHODA_view

- Susceptible
- Early: Type 1
- Dynamic
- Late
- Continued Loss
- Missing Home Value Data
- Not Gentrifying

Search result [Close]

6301 CIRCULO DE AMISTAD, AUSTIN, TX, 78741

[Zoom to](#) [More]

-97

300ft





Imagine Austin & Mobility Corridors

6301 CIRCULO DE AMISTAD, X

Show search results for 630...



Legend

2016 Mobility Bond Corridor Projects

— Construction Eligible Corridor

- - - Preliminary Engineering and Design

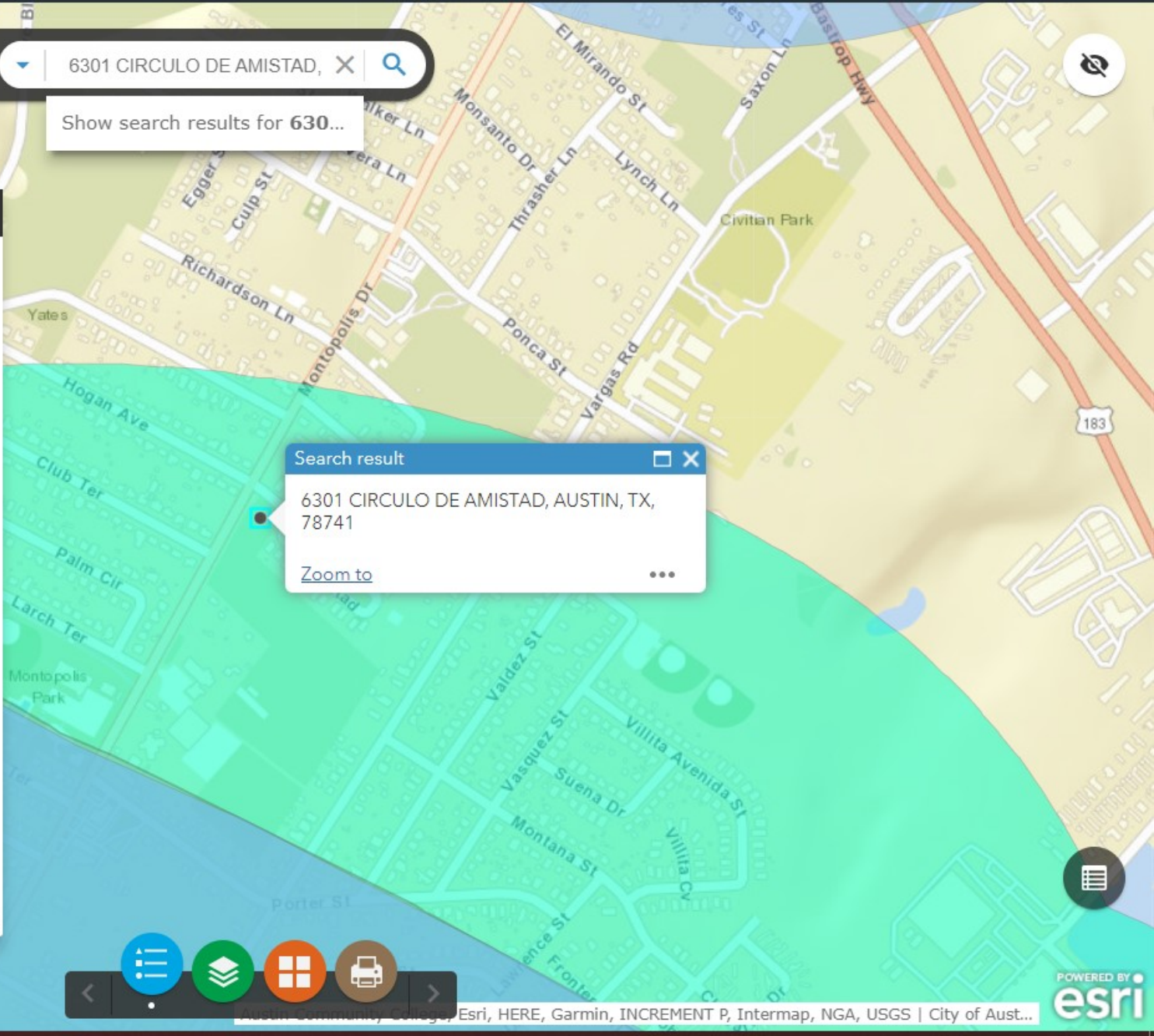
Mobility Bond Corridor: 1/2-Mile Buffer



Imagine Austin Center: 1/2-Mile Buffer



Imagine Austin Corridor: 1/2-Mile Buffer



Search result

6301 CIRCULO DE AMISTAD, AUSTIN, TX, 78741

[Zoom to](#)

600ft






6301 CIRCULO DE AMISTAD, X

Show search results for 630...




Legend

High Frequency Bus Routes: 1/4-Mile Buffer



Bus Routes: 3/4-Mile Buffer



Search result

6301 CIRCULO DE AMISTAD, AUSTIN, TX, 78741

[Zoom to](#)

-97

300ft





6301 CIRCULO DE AMISTAD, X

Show search results for 630...

Legend

Healthy Food



Healthy Food Retail Locations



Search result
6301 CIRCULO DE AMISTAD, AUSTIN, TX, 78741
Zoom to



Elementary School Attendance Zones

6301 CIRCULO DE AMISTAD, X

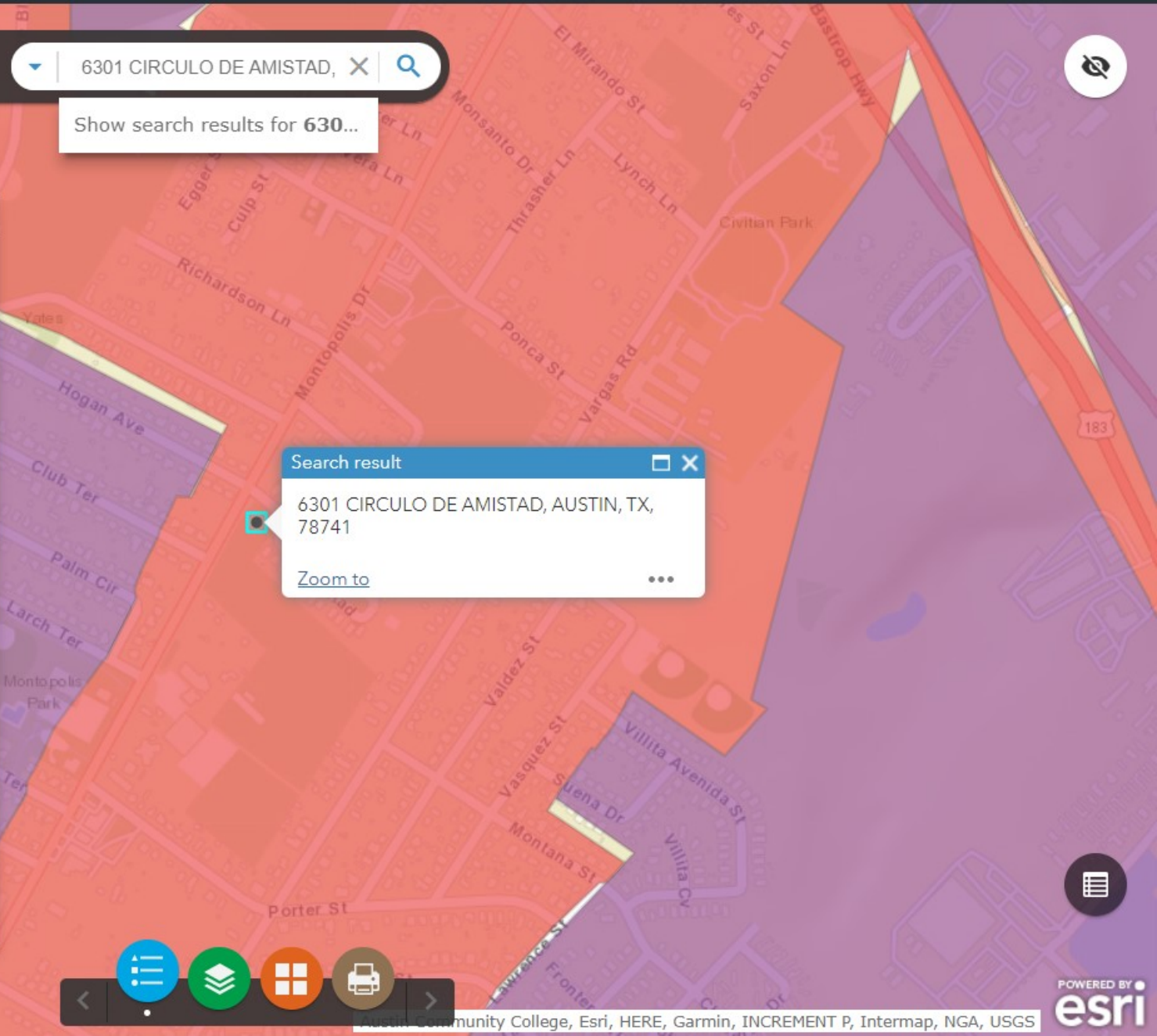
Show search results for 630...



Legend

Austin Elementary School Attendance Areas

- Austin ISD
- Pflugerville ISD
- Manor ISD
- Del Valle ISD
- Round Rock ISD
- Lake Travis ISD
- Lago Vista ISD



Search result

6301 CIRCULO DE AMISTAD, AUSTIN, TX, 78741

[Zoom to](#)

600ft





FloodPro

Find Floodplain Information



I want to...



Tools



Appraisal District: Travis

FEMA Floodplain

Flood Zone: X

Community Number: 480624

Panel Number:

Effective Date: None

100-Year Flood Elevation: N/A

500-Year Flood Elevation: N/A

City of Austin Floodplain

25-Year Flood Elevation: N/A

100-Year Flood Elevation: N/A

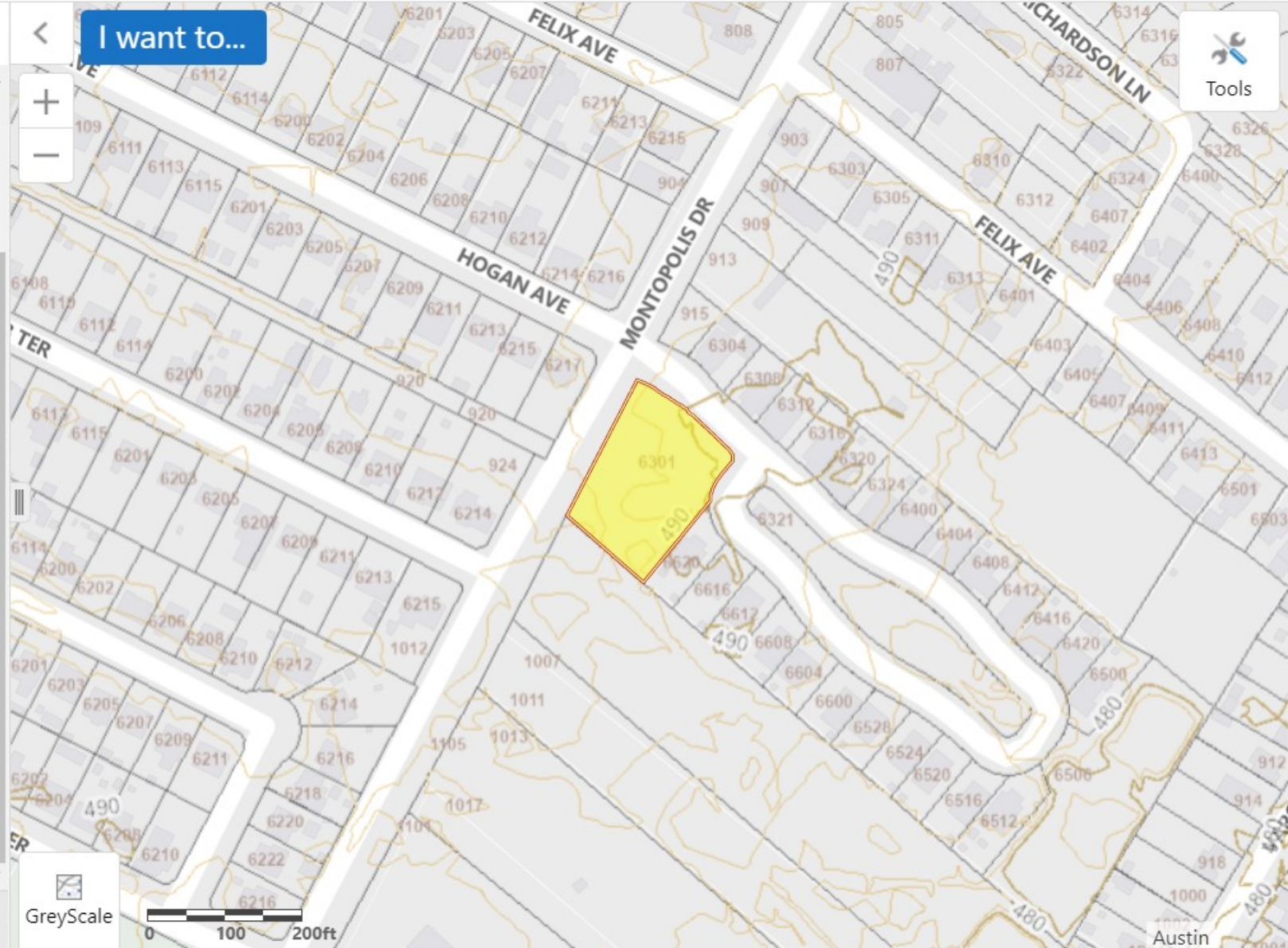
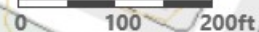
[Print Floodplain Report](#)

Try Again

Cancel



GreyScale



BOUNDARY, TOPOGRAPHIC, TREE, & UTILITY SURVEY

Address 6301 CIRCULO DE AMISTAD Reference Austin Habitat for Humanity, Inc.
 Lot 27*, Block A, MARY VICE ESTATES, a Subdivision in TRAVIS County, Texas,
 of record in Volume 101, Page 321, Plat Records of TRAVIS County, Texas.



SCALE
1"=40'

LEGEND

- △ Calculated Point
- 1/2" Iron Rod Found With Yellow Cap Stamped "GARON"
- 1/2" Uncapped Iron Rod Found
- 1/2" Iron Rod Found With Yellow Cap Stamped "TLS"
- 1/2" Iron Rod Set With Yellow Cap Stamped "Landmark Surveying"
- 100x Critical Root Zone, Trunk, & Tag Number
- Overhead Electric Line & Power Pole With Guy Wire And Anchor
- [---] Record Adjoiner Information
- (---) Record Information Per Plat
- TBM▲ Temporary Benchmark Set
- B.S.L. Building Setback Line
- Concrete Improvements
- Line Break (Not to scale)
- O.P.R.T.C.T. Official Public Records, Travis County, Texas
- R.P.R.T.C.T. Real Property Records, Travis County, Texas
- D.R.T.C.T. Deed Records, Travis County, Texas
- EMH Electrical Man Hole
- Chainlink Fence
- Fiber Optic Riser
- Water Meter
- TSP Traffic Signal Pole
- Edge of Asphalt
- Street/Traffic Sign
- Water Valve
- R.O.W. Right Of Way
- Fire Hydrant
- Disc Found
- Clean Out
- Gas Riser

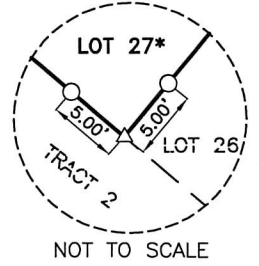
*** NOTE**
 "LOT 27", AS REFERENCED IN ADJOINER DOCUMENT NO. 2015189337, O.P.R.T.C.T.

TREE LIST
 MS = MULTI-STEM
 AE = AMERICAN ELM LD = LIVE OAK
 P = PALM M = MULBERRY
 SD = SHINGLE OAK
 H = HERITAGE

CRITICAL ROOT ZONE TREE TAG & TRUNK DIAMETER

TREE TAG NO.	DESCRIPTION
176	10' P
177	18' P
178	16' P
179	16' P
180	12' P
181	9' AE
182	8' AE
183	14' M
184	MS 21' 15' M
185	12' SD
186	14' LD
187	MS 7' 7" LD
188	H 44' LD

DETAIL
 REFERENCE POINTS SET TO PROPERTY CORNER INSIDE 44" LIVE OAK



CURVE TABLE

CURVE BEARING	CHORD DISTANCE	ARC LENGTH	RADIUS
① S54°49'51"E	65.26'	65.46'	245.31'
(S52°26'34"E	64.99'	65.19'	236.00'
② S02°52'43"E	18.16'	20.07'	13.08'
(--- NO RECORD INFORMATION ---)			
③ S23°10'12"W	39.36'	40.03'	63.05'
(S25°39'10"W	39.47'	40.14'	63.00'

LINE TABLE

①	S63°10'37"E 24.34'	(S60°17'24"E 24.15')
②	S41°20'04"W 17.97'	(S43°52'31"W)

NOTES

- ONLY THOSE BUILDING SETBACK LINES SHOWN OR REFERENCED ON THE RECORD SUBDIVISION PLAT ARE SHOWN HEREON. THEREFORE, OTHER BUILDING SETBACK LINES THAT MAY AFFECT THIS LOT ARE NOT SHOWN HEREON.
- A TITLE COMMITMENT WAS NOT AVAILABLE AT THE TIME OF THIS SURVEY; THEREFORE, ONLY EASEMENTS SHOWN OR REFERENCED ON THE RECORD SUBDIVISION PLAT ARE SHOWN HEREON.
- BUILDING SETBACK LINES MAY ALSO BE AFFECTED BY LOCAL ZONING ORDINANCES, RESTRICTIVE COVENANTS, ETC. THAT ARE NOT SHOWN HEREON.

A TITLE COMMITMENT WAS NOT AVAILABLE AT THE TIME OF THIS SURVEY. ALL EASEMENTS OF WHICH I HAVE KNOWLEDGE ARE SHOWN OR DEPICTED HEREON. OTHER THAN VISIBLE EASEMENTS, NO UNRECORDED OR UNWRITTEN EASEMENTS WHICH MAY EXIST ARE SHOWN HEREON. NO ADDITIONAL RESEARCH OF EASEMENTS WAS PERFORMED BY LANDMARK SURVEYING, LP. FOR THIS SURVEY.

I HEREBY STATE THAT A SURVEY WAS MADE ON THE GROUND OF THE PROPERTY SHOWN HEREON; THAT THERE ARE NO VISIBLE DISCREPANCIES, CONFLICTS, SHORTAGES IN AREA, BOUNDARY LINE CONFLICTS, OVERLAPPING OF IMPROVEMENTS, EASEMENTS OR RIGHT-OF-WAY, EXCEPT AS SHOWN; THAT SAID PROPERTY ADJOINS A PUBLIC ROADWAY; AND THAT THIS PLAT IS AN ACCURATE REPRESENTATION OF THE PROPERTY TO THE BEST OF MY KNOWLEDGE.

AS SURVEYED BY:
 LANDMARK SURVEYING, LP
 TEXAS FIRM REGISTRATION NO. 100727-00

Juan M. Canales, Jr.

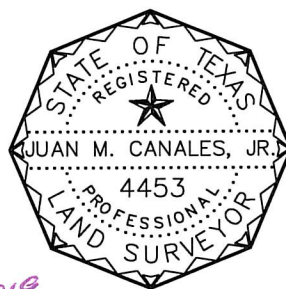
JUAN M. CANALES, JR.
 Registered Professional Land Surveyor No. 4453
 Surveyed: May 21 & 31, 2018; JUNE 5, 2018

THIS SKETCH IS VALID ONLY IF IT BEARS THE ORIGINAL SIGNATURE OF THE ABOVE SURVEYOR.

CLIENT: HABITAT
 DATE: JUNE 14, 2018
 OFFICE: K. KAWAZOE
 CREW: BONDS, VALDEZ
 F.B.: 1634/21
 JOB #: 0008-359-01
 DISK: T:habitat\6301 Circulo de Amistad - Boundary/Topo/Tree/Utility

REVIEWED BY

Imc *6-24-2019*
 Initials Date



FLOOD PLAIN NOTE

THE PROPERTY DESCRIBED HEREON IS CONTAINED WITHIN ZONE "X", ACCORDING TO FIRM MAP NUMBER 48453C0605J, EFFECTIVE JANUARY 6, 2016, AS PUBLISHED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY, THE PURPOSE OF WHICH IS FOR FLOOD INSURANCE ONLY.

BASIS OF BEARING

TEXAS COORDINATE SYSTEM OF 1983 (CENTRAL ZONE-4203) NAD 83, (CORS) U.S. SURVEY FEET GEOID MODEL 12A. ALL DISTANCES SHOWN HEREON ARE GRID DISTANCES.

REPRODUCTION OF THIS SURVEY IS EXPRESSLY FORBIDDEN. COPIES WITHOUT ORIGINAL SIGNATURES ARE VOID.

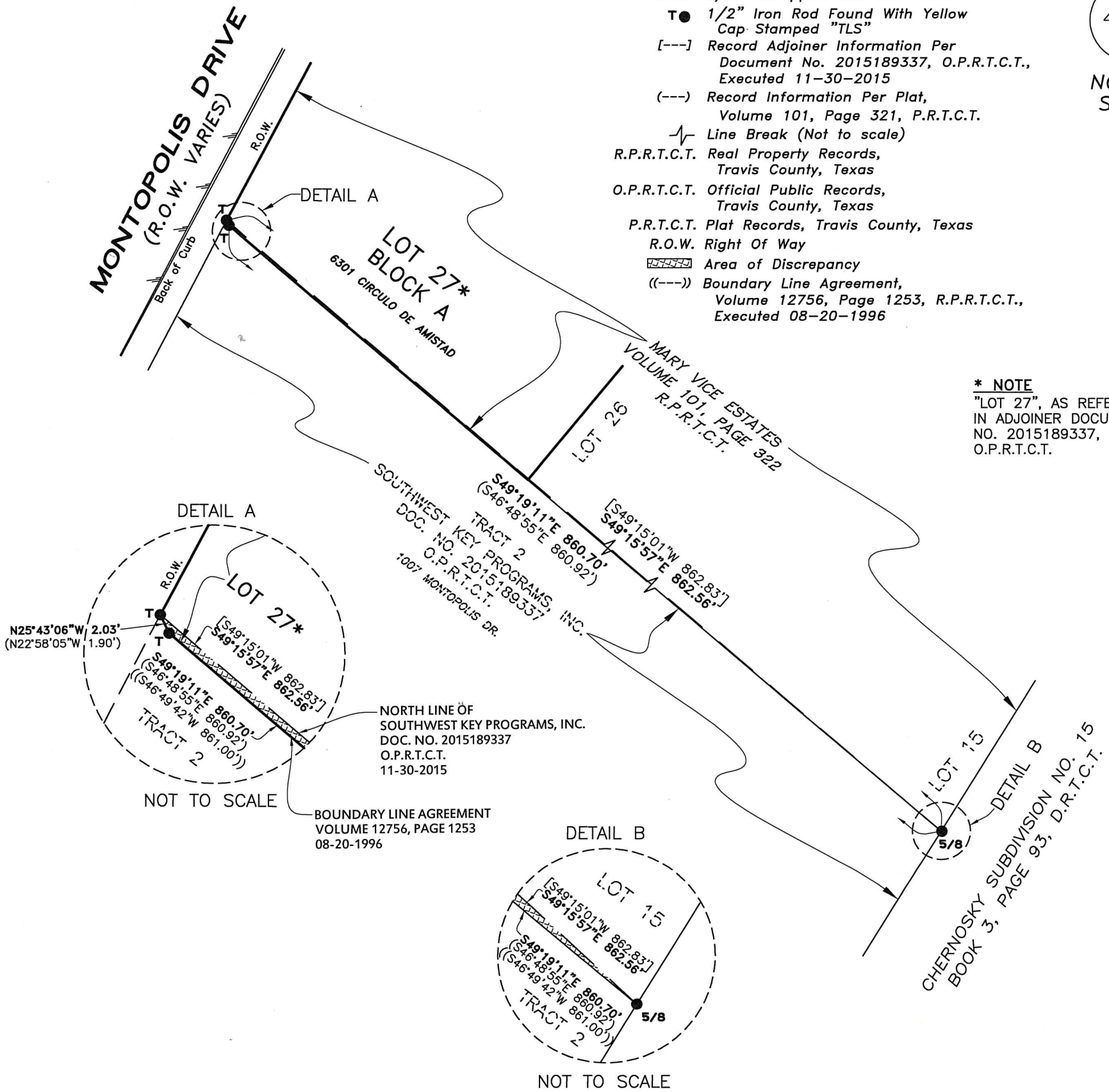
Landmark
 SURVEYING, LP
 TEXAS FIRM REGISTRATION NO. 100727-00
 2205 E. 5TH STREET
 AUSTIN, TEXAS 78702
 PH: (512)328-7411 FAX: (512)328-7413

SKETCH SHOWING RELATIONSHIP OF LOT 27*, BOUNDARY LINE AGREEMENT, AND RECORD ADJOINER DEED – TO ACCOMPANY BOUNDARY, TOPOGRAPHIC, TREE, & UTILITY SURVEY

Address 6301 CIRCULO DE AMISTAD Reference Austin Habitat for Humanity, Inc.
 Lot 27*, Block A, MARY VICE ESTATES, a Subdivision in TRAVIS County, Texas,
 of record in Volume 101, Page 321, Plat Records of TRAVIS County, Texas.

LEGEND

- 5/8● 5/8" Uncapped Iron Rod Found
- T● 1/2" Iron Rod Found With Yellow Cap Stamped "TLS"
- [---] Record Adjoiner Information Per Document No. 2015189337, O.P.R.T.C.T., Executed 11-30-2015
- (---) Record Information Per Plat, Volume 101, Page 321, P.R.T.C.T.
- Line Break (Not to scale)
- R.P.R.T.C.T. Real Property Records, Travis County, Texas
- O.P.R.T.C.T. Official Public Records, Travis County, Texas
- P.R.T.C.T. Plat Records, Travis County, Texas
- R.O.W. Right Of Way
- [---] Area of Discrepancy
- ((---)) Boundary Line Agreement, Volume 12756, Page 1253, R.P.R.T.C.T., Executed 08-20-1996



I HEREBY STATE THAT A SURVEY WAS MADE ON THE GROUND OF THE PROPERTY SHOWN HEREON; THAT THERE ARE NO VISIBLE DISCREPANCIES, CONFLICTS, SHORTAGES IN AREA, BOUNDARY LINE CONFLICTS, OVERLAPPING OF IMPROVEMENTS, EASEMENTS OR RIGHT-OF-WAY, EXCEPT AS SHOWN; THAT SAID PROPERTY ADJOINS A PUBLIC ROADWAY; AND THAT THIS PLAT IS AN ACCURATE REPRESENTATION OF THE PROPERTY TO THE BEST OF MY KNOWLEDGE.

AS SURVEYED BY:
 LANDMARK SURVEYING, LP
 TEXAS FIRM REGISTRATION NO. 100727-00

Juan M. Canales, Jr.

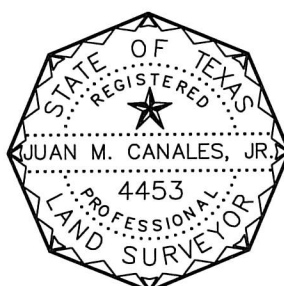
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REVIEWED BY

JMC *6.24.2019*
 Initials Date



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Landmark
 SURVEYING, LP
 TEXAS FIRM REGISTRATION NO. 100727-00
 2205 E. 5TH STREET
 AUSTIN, TEXAS 78702
 PH: (512)328-7411 FAX: (512)328-7413

GENERAL NOTES

- The owner shall bear full responsibility for all costs and provisions of improvements to the City of Austin Water and Wastewater systems required as a result of this development.
- Tree survey information shall be provided as required at the time of site plan and site development permitting.
- Any required easements shall be provided at the time of site development permitting and will be dedicated by separate instrument.
- Prior to construction, drainage plans will be submitted to the City of Austin for review.
- Prior to construction, site plan approval by the City of Austin staff is required.
- Water and wastewater systems will connect to the City of Austin systems.
- Cut and fill information will be provided at the time of site development permitting.
- Off street parking and loading requirements will be provided in accordance with Sections 13-5-95 through 13-5-107 of the Land Development Code. Residential Lots (Area 2) shall conform to 13-5-107, Part I for Single Family Residential and require "2 spaces per dwelling unit" minimum off-street parking, and "None" for off-street loading requirements.
- The responsibility for maintenance of storm water drainage facilities lies with the owner, or successor in title, of the land.
- Fire hydrants will be installed in accordance with guidance and standards furnished by the Austin Fire Department at the time of site development permitting.
- All signs will comply with the Sign Ordinance of the City of Austin Land Development Code Chapter 13-2 Article VII. Area 1 will comply with the ordinance based on the Neighborhood Commercial Sign District, Area 2 will comply with the ordinance as defined for Low Density Residential Sign District.
- The home owners association shall be responsible for all maintenance and taxes relating to common areas, including Area 3.
- The required parkland dedication for the proposed P.U.D. is a maximum of .336 acres based on the following calculation:
SINGLE FAMILY
Proposed max. 24 units X 2.8 X 5/1000 = .336 acres (actual dedicated parkland of P.U.D. = approx. 1.0 acre)
- Prior to final plat approval, a parkland dedication fee equivalent to the required parkland acreage or actual dedication of the required land will occur. Any land within this P.U.D. dedicated to the City of Austin may continue to be counted as gross and net site area for site development purposes.
- The proposed landscape on the P.U.D. will meet or exceed the landscape ordinance of the City of Austin.
- No Critical Environmental Features such as point recharge features, canyon rimrock, caves, springs, sinkholes or bluffs are on or within 150 feet from the project. A certification that no CEF's are present will be submitted at the time of site development permitting.
- No wetlands are on or within 150 feet from the project. A certification that no wetlands are present will be submitted at the time of site development permitting.
- Access to Montopolis Drive will be limited to the public loop road and as required for access to the commercial lot.
- The design concept for the Single Family Residential Housing will be a modification of the Austin Land Development Code Chapter 13-2 Article IV Subdivision Regulations. The criteria for minimum lot area, minimum lot widths and frontage, minimum setbacks, minimum street width, and other standards are varied from the subdivision regulations and are in keeping with the design standards of the Traditional Neighborhood Development (TND) Code.
- A pedestrian and bicycle path connection is intended from the P.U.D. to Vargas Street should the owner obtain and purchase the adjoining lot. Only emergency vehicular access will be allowed from Vargas Street to the P.U.D.
- Compatibility Standards shall be amended from the City of Austin Land Development Code 13-2-734 (Area 1 to Area 2):
A.) No structure shall be erected within 25 feet of a property used or zoned for SF-5 or more restrictive (Single Family Residential, Area 2).
B.) No structure shall exceed 40 feet in height within 25 feet of a property used or zoned SF-5 or more restrictive (Single Family Residential, Area 2).

- Area 1, the "Commercial Site" will be included for water quality and detention calculations for the entire site assuming topographical surveys allow.
- Pedestrian sidewalks will comply with A.D.A. requirements and will be constructed in accordance with the City of Austin standard specifications. Curb ramps will be provided wherever an accessible route crosses a curb. Minimum width of the accessible route is 36 in. These sidewalks shall be in place prior to the lot being occupied. Failure to construct the required sidewalks may result in withholding of Certificates of Occupancy or utility connections by the governing body or utility company.
- Water quality pond and detention must be contained within a water quality easement. Operation and maintenance of the ponds shall be conducted by the owner of the commercial lot. Until the commercial lot is purchased by another owner, Habitat for Humanity will take responsibility for and maintain all ponds.
- If public sidewalks on Montopolis Drive enter the P.U.D., city easements will be required at the time of site plan and site development permitting.
- Construction is limited to Areas 1, 2, and 3 with the exception of water control features.
- In the event that lot No. 8, Chernosky Subdivision No. 15, Book 1, Page 41 is obtained by the owner, an emergency access/ pedestrian path shall be provided to connect with Vargas Street.
- A declaration of covenants, easements, and restrictions will be recorded to address site development restrictions and provide for maintenance and use easements required by the P.U.D. land use plan for the residential properties.

MARY VICE ESTATES SITE DEVELOPMENT REGULATIONS

COMMERCIAL SITE

AREA 1	Gross Site Area	Net Site Area	Max. Sq. Ft. Bldg.	Min. Setback	Max. Height
	0.81 AC.	0.81 AC.	6000 SF	25FT.	40FT.

- TYPES OF USES:**
- RESIDENTIAL USES:** ACCESSORY DWELLING UNIT, MULTI-FAMILY LOW DENSITY
 - COMMERCIAL USES:** ADMINISTRATIVE AND BUSINESS OFFICES, ART AND CRAFT STUDIO (GENERAL), ART AND CRAFT STUDIO (LIMITED), BUSINESS SUPPORT SERVICES, COMMUNICATIONS SERVICES, FINANCIAL SERVICES, MEDICAL OFFICES, PERSONAL SERVICES, PROFESSIONAL OFFICE, SOFTWARE DEVELOPMENT
 - CIVIC USES:** ADMINISTRATIVE SERVICES, CLUB OR LODGE, DAY CARE SERVICES (COMMERCIAL), DAY CARE SERVICES (GENERAL), DAY CARE SERVICES (LIMITED)
 - INDUSTRIAL USES:** NONE
 - AGRICULTURAL:** NONE

SINGLE FAMILY RESIDENTIAL

AREA 2	Gross Site Area	Net Site Area	Number of Units	Density	Min. Setback	Max. Height
	4.37 AC.	4.37 AC.	24 units	5.5 U/AC.	Front 10FT. Side 5FT. Rear 5FT.	35 FT.

- TYPES OF USES:** RESIDENTIAL USES: SINGLE FAMILY RESIDENTIAL

COMMON AREA

AREA 3	Gross Site Area	Net Site Area
	.77 AC.	.77 AC.

- TYPES OF USES:** COMMUNITY RECREATION (PUBLIC), COMMUNITY RECREATION (PRIVATE)

WATER QUALITY AND DETENTION

AREA 4	Gross Site Area	Net Site Area
	1.26 AC.	1.26 AC.

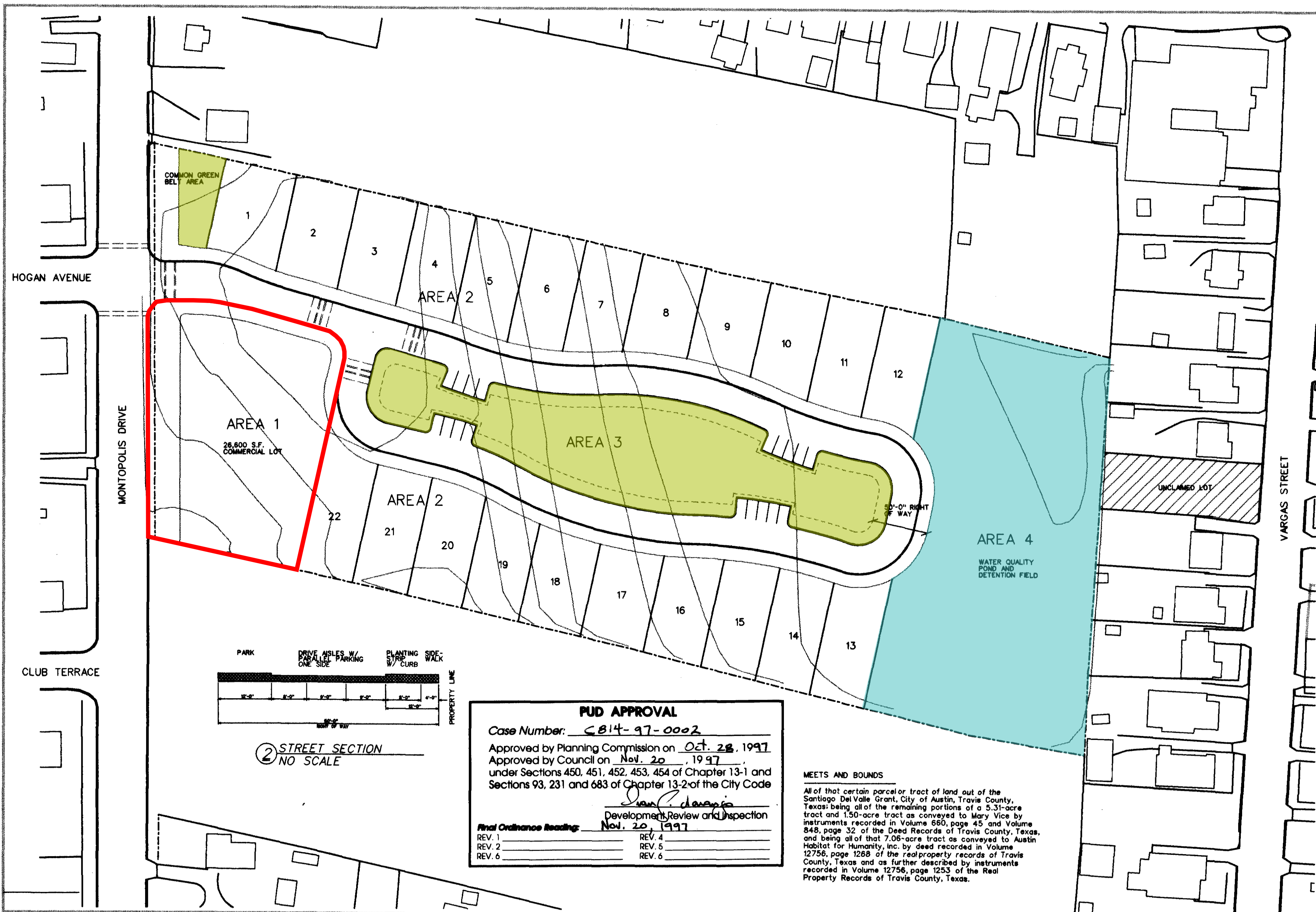
- TYPES OF USES:** WATER QUALITY CONTROL FEATURES

IMPERVIOUS COVER

AREA 1:	80%
AREAS 2, 3, 4:	55%

ADDITIONAL SITE REGULATIONS

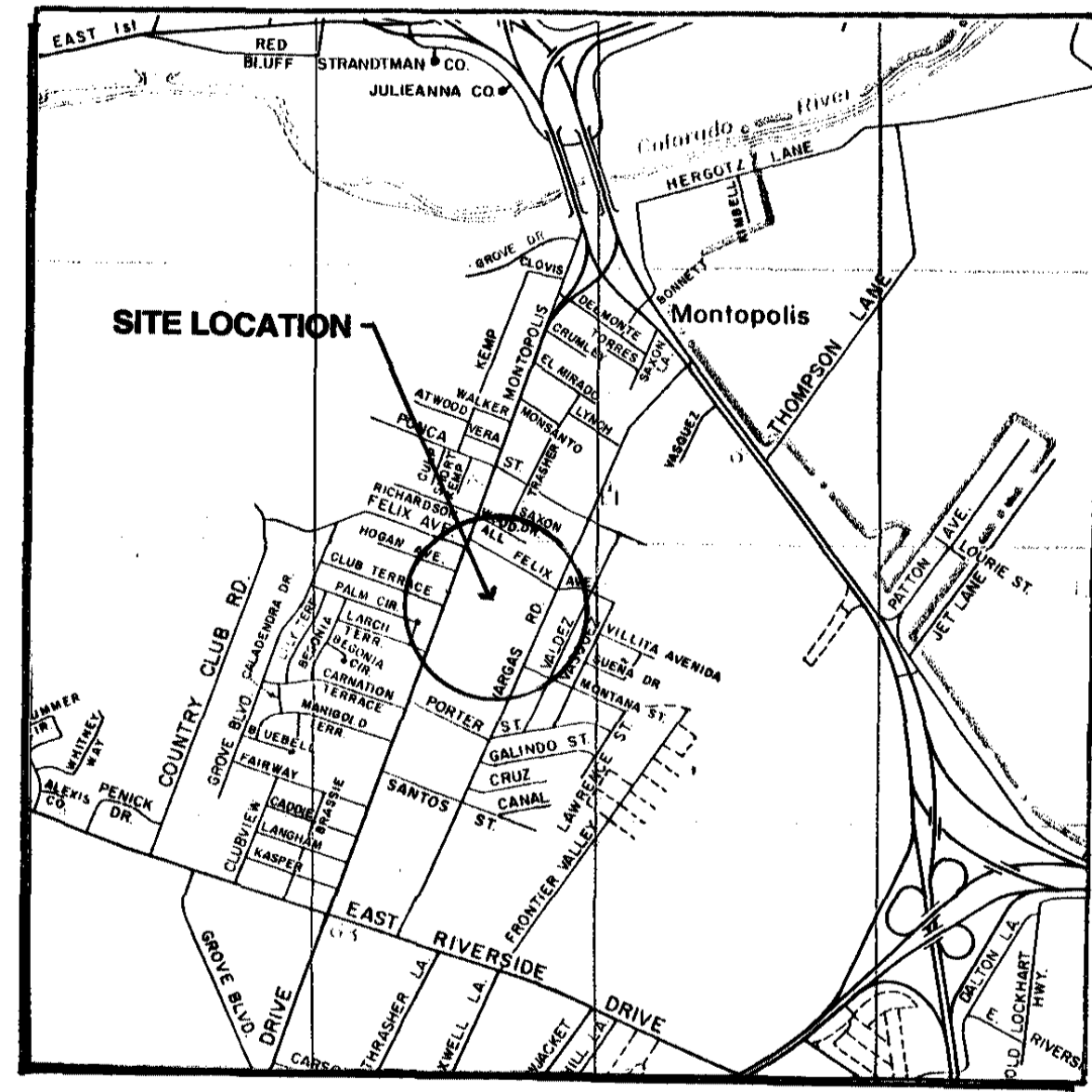
- The minimum area for single family residential lots shall be 5000 SQ. FT.
- The minimum width for single family lots shall be 50 FT. fronting dimension, and the minimum depth shall be 85 FT. The small lot single family use is permitted under standards which maintain single family neighborhood characteristics.
- The minimum front yard setback for any single family residential lot shall be 10 FT. from property line.
- The minimum side yard setback for single family residential lots shall be 5 FT.
- The minimum distance between dwellings on adjoining lots shall not be less than 10 FT.
- No single family residential lot shall have more than one dwelling unit.
- The maximum height of any residential building shall be 35 FT.
- Two off-street parking spaces will be required for each dwelling unit.
- Public utility easements may be established along the rear, front, or side lot lines, and underground utility service to all lots is required.
- The minimum street width for all two-way vehicular streets is 26 FT., including one parallel parking lane 8 FT. in width, in keeping with the Traditional Neighborhood Development (TND) Code.
- The maintenance of all common areas and access easements shall be the responsibility of the abutting property owners or homeowners association, as such responsibility is established in the declaration of covenants, easements, and restrictions.



PUD APPROVAL
 Case Number: C814-97-0002
 Approved by Planning Commission on Oct. 28, 1997
 Approved by Council on Nov. 20, 1997
 under Sections 450, 451, 452, 453, 454 of Chapter 13-1 and Sections 93, 231 and 683 of Chapter 13-2 of the City Code
 Development Review and Inspection
 Final Ordinance Issued: Nov. 20, 1997
 REV. 1 _____ REV. 4 _____
 REV. 2 _____ REV. 5 _____
 REV. 3 _____ REV. 6 _____

MEETS AND BOUNDS
 All of that certain parcel or tract of land out of the Santiago Del Valle Grant, City of Austin, Travis County, Texas; being all of the remaining portions of a 5.31-acre tract and 1.50-acre tract as conveyed to Mary Vice by instruments recorded in Volume 680, page 45 and Volume 848, page 32 of the Deed Records of Travis County, Texas; and being all of that 7.06-acre tract as conveyed to Austin Habitat for Humanity, Inc. by deed recorded in Volume 12756, page 1268 of the real property records of Travis County, Texas and as further described by instruments recorded in Volume 12756, page 1253 of the Real Property Records of Travis County, Texas.

1 P.U.D. SITE PLAN
 SCALE: 1" = 60'-0"



**MARY VICE ESTATES
 AUSTIN HABITAT FOR HUMANITY
 P.U.D. LAND USE PLAN**

23 NOVEMBER, 1997

CLOVIS HEIMSATH ARCHITECTS
 605 BRAZOS AUSTIN, TEXAS 78701 (612) 478-1621 477-7269 FAX

CIVCON ENGINEERS

702 SPOFFORD AUSTIN, TEXAS 78703 (612) 448-1400

CFX ENGINEERS

3901 SOUTH LAMAR, SUITE 450 AUSTIN, TEXAS 78704 (612) 448-9888

JAMES E. GARON & ASSOCIATES

2312 WESTERN TRAILS BOULEVARD, BUILDING D, SUITE 404
 AUSTIN, TEXAS 78745 (612) 707-8087

LAND DESIGN STUDIO

8711 BURNET ROAD, SUITE F-70
 AUSTIN, TEXAS 78757 (612) 467-7767

Mary Vice Estates PUD Land Use Plan

PUD Amendment Request for Commercial Site-Area 1

REQUEST: To increase the allowable maximum building square footage from 6,000 SF to 30,000 SF, and reduce the building setbacks from 25' to 15' along Montopolis Drive and Circulo de Amistad and to 10' along the rear and side property line. Request to also allow townhouse, condominium, and duplex residential uses. This request will allow to increase the number of housing units all of which will be 100% affordable at 80% of AMFI or below.

SITE DEVELOPMENT REGULATIONS FOR AREA 1

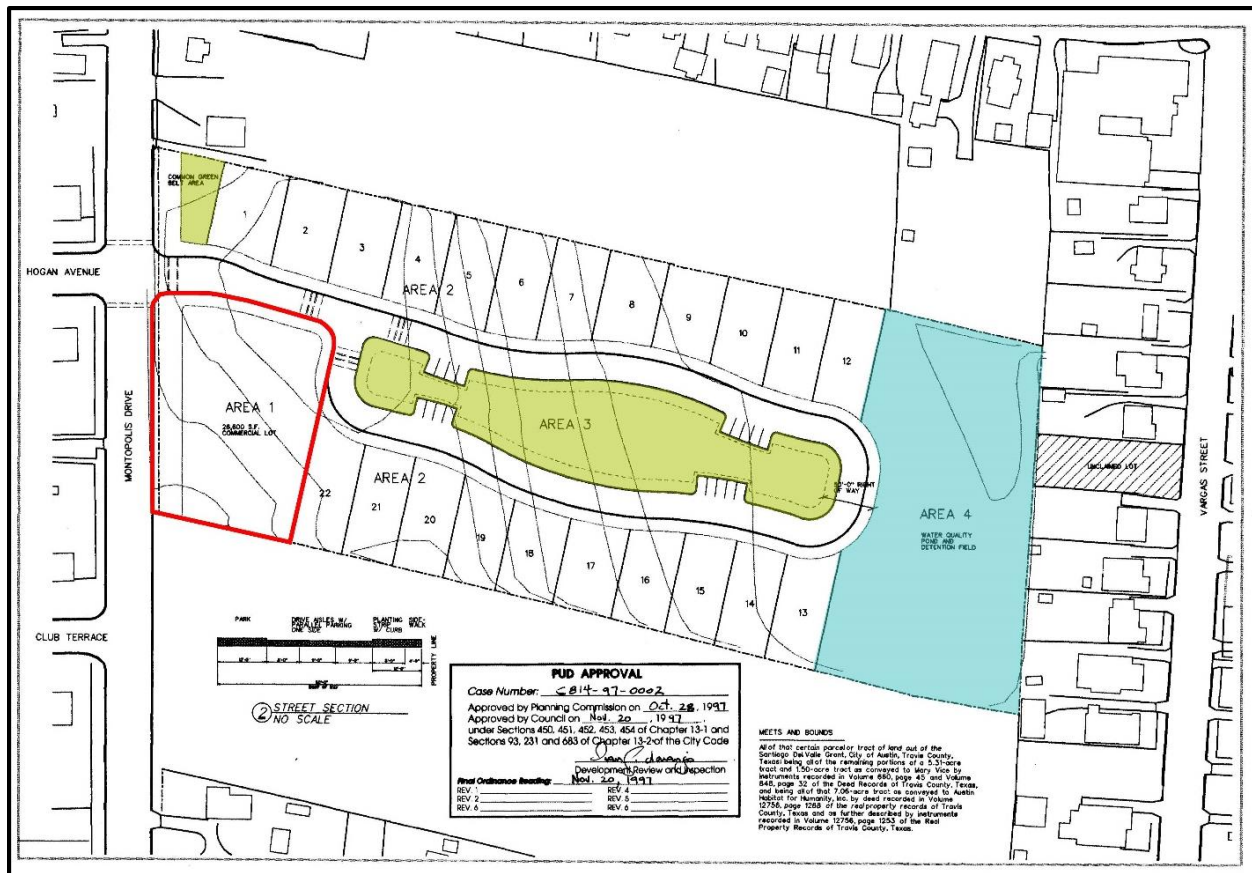
	Gross Site Area	Net Site Area	Max SF Bldg	Min Setback	Max Height	Residential Uses
Current Regulations	.61 Acres	.61 Acres	6,000	25'	40'	MF Low Den/ADU
PUD Amendment Request	No Change	No Change	30,000	15' @ St/10'	No Change	TH/Condo/Duplex

PROPERTY DESCRIPTION

Name: Mary Vice Estates
Address: 6301 CIRCULO DE AMISTAD TX 78741
Brief Legal Description: LOT 27 BLK A VICE MARY ESTATES
Land Area: 26,600 SF 0.61 Acres
Current Zoning: PUD (Planned Unit Development)
Future Land Use Map Designation: Commercial
PUD Subject Tract: Commercial Site-Area 1
PUD Approval Date by City Council: November 20, 1997
Plat Book: 101 Page(s): 321 Document # (Film Code): 00009827709

OWNER INFORMATION

Owner: Austin Habitat for Humanity
Address: 500 W Ben White Blvd
City/State/Zip: Austin, Texas 78704
Phone: (512) 472-8788





Application for OHDA Funding – 2023

Tab 5c – Zoning Letter



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: Andy Alarcon, Austin Habit for humanity
Mailing Address:
500 W Ben White Boulevard,
Austin, TX 78704

Tax Parcel Identification Number

Agency: TCAD
Parcel ID: 0305160423

Zoning Classification(s)

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

PUD-NP

Zoning Case Number(s)

Look up case info at https://www.austintexas.gov/devreview/a_queryfolder_permits.jsp

C14-01-0060

Zoning Ordinance Number(s)

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

010927-28

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, RoxAnne Parker, 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.



Application for OHDA Funding – 2023

Tab 5d – Proof of Site Control

RECORDED BY
TEXAS PROFESSIONAL TITLE, INC.

FILM CODE

3100
gp

WARRANTY DEED

00005476183

14
THE STATE OF TEXAS
COUNTY OF TRAVIS

§
§
§

KNOW ALL MEN BY THESE PRESENTS:

That **FAMILY ELDERCARE, INC.**, Guardian of the Person and Estate of ~~Mary Vice~~, by and through its agent **VICTORIA TOUCHET**, and **FLORENCE VICE**, a single woman, both of Travis County, Texas, for and in consideration of the sum of TEN DOLLARS and other good and valuable consideration to the undersigned paid by Grantee herein named, the receipt and sufficiency of which is hereby acknowledged, have GRANTED, SOLD AND CONVEYED, and by these presents do GRANT, SELL AND CONVEY unto **AUSTIN HABITAT FOR HUMANITY, INC.**, a Texas non-profit corporation having its principal place of business in Travis County, Texas, all of their right, title and interest in and to the following described real property (the Property) in Travis County, Texas, to-wit,

All of that certain parcel, or tract of land out of the Santiago Del Valle Grant, City of Austin, Travis County Texas; being all of the remaining portions of a 5.310-acre tract and 1.50-acre tract as conveyed to R.B. Vice by instruments recorded in Volume 660, Page 45 and Volume 848, Page 32 of the Deed Records of Travis County, Texas. 7.06 acres more or less and more particularly described in Exhibit "A" attached hereto.

TO HAVE AND HOLD the Property, together with all and singular the rights and appurtenances belonging in anyway to the Property to Grantee and assigns forever; and they do hereby bind themself, their heirs, executors and administrators to WARRANT AND FOREVER DEFEND all and singular the Property to Grantee and against every person whomsoever lawfully claiming or to claim all or any part of the Property.

Victoria Touchet
FAMILY ELDERCARE, INC. GUARDIAN
OF THE PERSON AND ESTATE OF MARY
VICE
by: VICTORIA TOUCHET, its agent

Florence Vice
FLORENCE VICE

142462

3-0516-0421 REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS.

12756 1268

STATE OF TEXAS

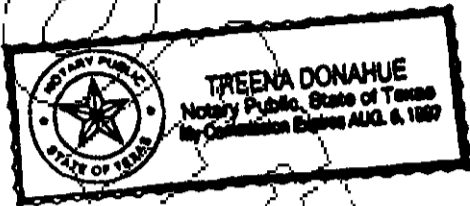
§

ACKNOWLEDGMENT

COUNTY OF TRAVIS

§

This instrument was acknowledged before me on the 15 day of October, 1996 by **VICTORIA TOUCHET**, Agent for **FAMILY ELDERCARE, INC.**, Guardian of the Person and Estate of Mary Vice, Grantor.



Treena Donahue
Notary Public, In and for the State of Texas

STATE OF TEXAS

§

ACKNOWLEDGMENT

COUNTY OF TRAVIS

§

This instrument was acknowledged before me on the 15 day of October, 1996 by **FLORENCE VICE**, Grantor.



Treena Donahue
Notary Public, In and for the State of Texas

PREPARED IN THE LAW OFFICE OF

KUHN, DOYLE & KUHN, P.C.
603 West Eighth Street
Austin, Texas 78701

AFTER RECORDING PLEASE RETURN TO:

~~Austin Habitat for Humanity, Inc.
310 Comal Street
Austin, Texas 78702~~

RETURN TO:
TEXAS PROFESSIONAL TITLE INC.
221 W. 6th, Suite 650
Austin, TX 78701

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

12756 1269

DUPLICATE

FIELD NOTES

ALL OF THAT CERTAIN PARCEL OR TRACT OF LAND OUT OF THE SANTIAGO DEL VALLE GRANT, CITY OF AUSTIN, TRAVIS COUNTY, TEXAS; BEING ALL OF THE REMAINING PORTIONS OF A 5.31-ACRE TRACT AND 1.50-ACRE TRACT AS CONVEYED TO MARY VICE BY INSTRUMENTS RECORDED IN VOLUME 660, PAGE 45 AND VOLUME 848, PAGE 32 OF THE DEED RECORDS OF TRAVIS COUNTY, TEXAS, AND BEING MORE PARTICULARLY DESCRIBED BY METES AND BOUNDS AS FOLLOWS:

COMMENCING at a 1/2" iron pipe found on the south right-of-way line of Felix Avenue at the northwest corner of Lot 1, Chernosky Subdivision No. 15, as recorded in Book 1, Page 41 of the Plat Records of Travis County, Texas; Thence, with the west line of Chernosky Subdivision No. 15, S33°31'40"W 81.55 feet, S33°42'25"W 150.56 feet and S34°30'40"W a distance of 58.37 feet to a 1/2" iron rod set at the most southerly corner of a 0.63 acre tract of land as conveyed to Felix R. Galabiz by deed recorded in Volume 3773, Page 937 of the Deed Records of Travis County, Texas, for the most easterly corner and **POINT OF BEGINNING** of the herein described tract of land;

THENCE, with the northwest line of Chernosky Subdivision No. 15, S34°19'08"W a distance of 364.07 feet to a 1/2" iron rod found at the most easterly corner of a 2.882-acre tract of land as conveyed to Herby's Joint Venture by deed recorded in Volume 11569, Page 8 of the Deed Records of Travis County, Texas, for the most southerly corner of this tract;

THENCE, with the northeast line of Herby's Joint Venture 2.882-acre tract, N46°49'42"W a distance of 861.00 feet to a 1/2" iron rod found at the most northerly corner of Herby's Joint Venture 2.882-acre tract at an angle point of this tract;

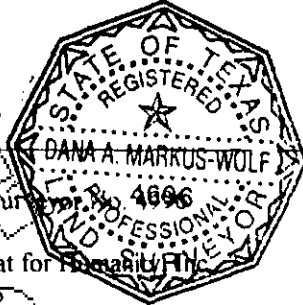
THENCE, N22°58'05"W a distance of 1.90 feet to a 1/2" iron rod found on the southeast right-of-way line of Montopolis Drive, at the most southerly corner of a 0.019 acre tract as conveyed to the City of Austin by deed recorded in Volume 3951, Page 1922 of the Deed Records of Travis County, Texas;

THENCE, with the southeast right-of-way line of Montopolis Drive, N30°24'00"E a distance of 351.21 feet to a 1/2" iron rod found at the most westerly corner of a 2.08-acre tract as conveyed to Richard L. Mathias and Kevin F. Weinrich by deed recorded in Volume 12474, Page 1763 of the Deed Records of Travis County, Texas, for the most northerly corner of this tract;

THENCE, S47°53'37"E pass at 730.97 feet a 1" iron pipe found at the most westerly corner of the above described Galabiz 0.63-acre tract, and continuing on for a total distance of 884.50 feet to the POINT OF BEGINNING and containing 7.06 acres of land, more or less

THEREBY CERTIFY that these notes were prepared by Landmark Surveying, Inc. from a survey made on the ground on January 5, 1996 under my supervision and are true and correct to the best of my knowledge.

Dana A. Markus-Wolf
Registered Professional Land Surveyor No. 4696



7/12/96
Date

Client: Austin Habitat for Humanity, Inc.
Date: July 12, 1996
WO No.: 95-0008-18-01
FB No.: 40/2
Disk: Habitat.007/vice.doc

FILED

96 AUG 22 PM 4: 29

DANA M. FAUVOIR
COUNTY CLERK
TRAVIS COUNTY, TEXAS

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

AUG 22 1996



COUNTY CLERK
TRAVIS COUNTY, TEXAS

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

12756 1271

SEARCHED INDEXED SERIALIZED FILED
AUG 22 1996
TRAVIS COUNTY, TEXAS



Application for OHDA Funding – 2023

Tab 5e – Phase I ESA

Removed from website copy of proposal due to file size. Document is available with full proposal.



Application for OHDA Funding – 2023

Tab 5f – SHPO

From: noreply@thc.state.tx.us
To: [Kate Reznick](mailto:Kate.Reznick@thc.state.tx.us); reviews@thc.state.tx.us
Subject: Project Review: 202012307
Date: Wednesday, May 27, 2020 8:54:17 AM



Re: Project Review under Section 106 of the National Historic Preservation Act and/or the Antiquities Code of Texas

THC Tracking #202012307

Montopolis Homes
6301 Circulo de Amistad
Austin, TX 787841

Dear Kate Reznick:

Thank you for your submittal regarding the above-referenced project. This response represents the comments of the Executive Director of the Texas Historical Commission (THC), as a courtesy review only and does not suffice for review under Section 106 of the National Historic Preservation Act or the Antiquities Code of Texas.

The review staff led by Tiffany Osburn and Charles Peveto has completed its review and has made the following determinations based on the information submitted for review:

Above-Ground Resources

- No historic properties are present or affected by the project as proposed. However, if historic properties are discovered or unanticipated effects on historic properties are found, work should cease in the immediate area; work can continue where no historic properties are present. Please contact the THC's History Programs Division at 512-463-5853 to consult on further actions that may be necessary to protect historic properties.

Archeology Comments

- No historic properties present or affected. However, if buried cultural materials are encountered during construction or disturbance activities, work should cease in the immediate area; work can continue where no cultural materials are present. Please contact the THC's Archeology Division at 512-463-6096 to consult on further actions that may be necessary to protect the cultural remains.

We look forward to further consultation with your office and hope to maintain a partnership that will foster effective historic preservation. Thank you for your cooperation in this review process, and for your efforts to preserve the irreplaceable heritage of Texas. If you have any questions concerning our review or if we can be of further assistance, please email the following reviewers: tiffany.osburn@thc.texas.gov, charles.peveto@thc.texas.gov

This response has been sent through the electronic THC review and compliance system (eTRAC). Submitting your project via eTRAC eliminates mailing delays and allows you to check the status of the review, receive an electronic response, and generate reports on your submissions. For more information, visit <http://thc.texas.gov/etrac-system>.

Sincerely,



For Mark Wolfe, State Historic Preservation Officer
Executive Director, Texas Historical Commission

Please do not respond to this email.