



RENTAL HOUSING DEVELOPMENT ASSISTANCE APPLICATION

November 4, 2022



Burnet Place Apartments

8007 Burnet Road

Austin, TX 78757

TRUE CASA CONSULTING, LLC

November 3, 2022

Ellis Morgan
City of Austin - NHCD
1000 East 11th Street
Austin, Texas 78702

RE: RHDA Application – Burnet Place Apartments

Dear Ellis:

Project Transitions makes this request for \$300,000 as the final layer of capital needed to start construction on Burnet Place Apartments – 61 units of life-saving, affordable housing with intensive supportive onsite services for persons living with HIV. The project is literally ready to start construction with both building and site permit in hand and a signed construction contract. We make this request as this team has exhausted every other funding layer available to this project. Given the extremely tight timeline of starting construction, we ask that this funding be administratively approved.

Burnet Place Apartments has been awarded BOTH a FHLB Dallas and FHLB Atlanta Affordable Housing Program grants totaling \$1.25M. The project has taken advantage of TDHCA's one time allocation of HOME American Rescue Plan funding in a special non-competitive set-aside and applied for \$6,318,646 in funding which is slated for approval at the December 8th TDHCA board meeting. Project Transitions has raised \$500,000 from Foundations and another \$871,432 in private donations as part of its extremely successful capital campaign. Paired with the \$6M in RHDA funding, \$3M in TDHCA National Housing Trust Fund funding and the \$39,230 in City of Austin RLRP funding already committed, this team has literally tapped every single funding source available.

The team has worked so very diligently on bringing costs to a realistic level. There have been hard decisions made – changing building from 4-story to 3-story, changing steel patio structure to wood, reducing common area spaces and changing tile to Hardie Board. The Project Transitions Board of Directors has formed a Real Estate Committee and Capital Campaign Committee to focus efforts on getting Burnet Place to the readiness level it has achieved today.

This truly is the last piece of funding to move this project past GO. Conversely, without this funding award, the project will be stalled once again opening up the risk (which has proven true month after month) of increased costs. The project can simply not raise any additional funding. The following timeline of events will hopefully be proof that an administrative approval of this \$300,000 will enable this project to start construction.

- **December 8, 2022** – The \$6,318,646 in TDHCA funding is approved at the TDHCA board meeting.
- **December 15, 2022** – We ask that this \$300,000 funding request be administratively approved. We could file the loan modification either at the December 19th closing or March closing.

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- **December 19, 2022** – Close on the \$7,000,000 in bridge funding with Capital Impact Partners, Enterprise Loan Fund and Texas State Affordable Housing Corporation.
- **December 20, 2022** – Issue Notice to Proceed and Start Construction.
- **March 2023** – Estimated realistic date to close on TDHCA HOME ARP funding (\$6,318,646) and TDHCA NHTF funding (\$3M.)

Thank you for considering Project Transitions' request of an additional award to fund 61 units of deeply supportive housing for our neighbors living with HIV at the Burnet Place development. The unprecedented construction cost, supply chain and labor shortage issues have wreaked havoc on all affordable housing development. We feel this \$300,000 is an extremely reasonable request to close out the capital stack for this project and start construction in earnest. The City of Austin was a lead funder of Roosevelt Gardens - 40 units of supportive housing that completed construction in July and will be 100% leased in November with a waiting list that far exceeds capacity. We hope the success of Roosevelt Gardens is evidence that this team can develop high-quality, affordable and supportive housing and that there is a great need for additional supportive units serving persons living with HIV in Central Texas.

Burnet Place will finally commence with this last request.

Thank you truly for your contributions and your consideration,

Jennifer Hicks
True Casa Consulting, LLC

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A1 – Executive
Summary/Project Proposal**

APPLICATION CHECKLIST/ INFORMATION FORM

DEVELOPER : Project Transitions, Inc.	OWNER/BORROWER NAME : Project Transitions, Inc.
DEVELOPMENT NAME : Burnet Place Apartments	FUNDING CYCLE DEADLINE : November 4, 2022
FEDERAL TAX ID NO: 74-2502171	DUNS NO: 788375921
PROJECT ADDRESS: 8007 Burnet Rd.	PROGRAM : RHDA
CONTACT NAME : Jennifer Hicks	AMOUNT REQUESTED: \$300,000
CONTACT ADDRESS AND PHONE : 3000 Skylark Drive, Austin, TX (512-203-4417)	

APPLICATION TABS

		INITIALS
A 1	EXECUTIVE SUMMARY/PROJECT PROPOSAL	LB
A 2	PROJECT SUMMARY FORM	LB
A 3	PROJECT TIMELINE	LB
A 4	DEVELOPMENT BUDGET	LB
A 5	OPERATING PRO FORMA	LB
A 6	SCORING SHEET	LB

ATTACHMENT TABS

				INITIALS
1	ENTITY INFORMATION	1.a.	Detailed listing of developer's experience	LB
		1.b.	Certificate of Status	LB
		1.c.	Statement of Confidence	LB
2	PRINCIPALS INFORMATION	2.a.	Resumes of principals	LB
		2.b.	Resumes of development team	LB
		2.c.	Resumes of property management team	LB
3	FINANCIAL INFORMATION	3.a.	Federal IRS Certification	LB
		3.b.	Certified Financial Audit	LB
		3.c.	Board Resolution	LB
		3.d.	Financial Statements	LB
		3.e.	Funding commitment letters	LB
4	PROJECT INFORMATION	4.a.	Market Study	LB
		4.b.	Good Neighbor Policy	LB
		4.c.	SMART Housing Letter	LB
		4.d.	MOU with ECHO	LB
		4.e.	Resident Services	LB
5	PROPERTY INFORMATION	5.a.	Appraisal	LB
		5.b.	Property Maps	LB
		5.c.	Zoning Verification Letter	LB
		5.d.	Proof of Site control	LB
		5.e.	Phase I ESA	LB
		5.f.	SHPO	LB

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.*

SIGNATURE OF APPLICANT

Leah Baker

PRINTED NAME

Leah Baker

TITLE OF APPLICANT

Interim Executive Director

DATE OF SUBMISSION

11/4/2022

DATE AND TIME STAMP OF RECEIPT

FOR AHFC USE ONLY



Project Proposal:

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

Housing has been identified as a critical component of Getting To Zero – a national initiative to end the HIV epidemic by 2030. Persons living with HIV/AIDS who do not have stable housing are much less likely to access and remain in medical care than are those who do have stable housing. Remaining in medical care and getting and staying on an effective medication regimen reduces a person's risk of transmitting HIV to a non-infected person to nearly zero, stopping the cycle of transmission and infection.

For people affected with HIV, homelessness most often means the difference between sickness and health.

PT's housing strategy in the re-development and expansion of Roosevelt Gardens and the new construction of Burnet Place Apartments serves a trifecta of public purpose: 1) response to a Public Health mandate to end the transmission of HIV by keeping people healthy and housed. 2) providing an additional 81 units of high, quality affordable and supportive housing to our City's portfolio. 3) builds the capacity of a local non-profit to continue developing additional housing.

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

The challenging situation in the affordable housing market in Austin and the increasing need for affordable supportive housing for persons living with HIV/AIDS in Austin, require Project Transitions to take **BOLD** action to increase its capacity to serve its target population. In order to ensure high-quality affordable supportive housing for current residents and to respond to the backlogged waiting list, Project Transitions will construct 61 units at 8007 Burnet Road as Burnet Place Apartments.

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

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



Burnet Place Apartments will be 61 units of affordable, multifamily rental units in a supportive environment. The proposed unit mix of 100% studio apartments is reflective of the housing needs of PT's current client population and the HIV epidemic (who is getting infected), the priorities of other housing providers in Austin (families with children tend to be housed a bit faster) and the configuration of PT's existing units (not having enough studio apartments.)

All 61 units are reserved for persons with incomes at or below 50% MFI with 12 units at 30% MFI, 12 units at 40% MFI and 37 units at 50% MFI.

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

- Assistance finding permanent housing
- Client needs assessment (housing, socio-social, financial, medical, mental health/subs use, interpersonal, items/assistance for daily living) – done at admission and at least annually, or when changes occur, or client meets larger goals
- Resource acquisition/connection/referral
- Connection to financial benefits (e.g., Social Security, SNAP benefits, emergency assistance in the case of any financial difficulties)
- Problem-solving around any issue
- Budgeting
- Skill building
- Goal setting
- Connection to medical care – including setting appointments/rescheduling, system navigation, talking with providers, self-advocacy during medical appointments, etc
- Medication adherence – getting refills, taking medications, barrier reduction, behavior change
- Increasing health literacy, disease education
- Conflict resolution – for familial, neighbor or other relationships; navigating relationships
- Grief counseling / emotional support
- Food Bank
- Monthly meetings to discuss goals, progress on goals, and address any emerging issues.
- Connection/Referral to job training, education
- Transportation to/from medical or other appointments
- Wellness checks
- Breakfast program
- Coping skills/boundaries
- Group activities such as support groups, cooking classes, wellness activities
- Emergency utility assistance

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A2 – Project Summary
Form**

Project Summary Form

1) Project Name Burnet Place Apartments	2) Project Type 100% Affordable	3) New Construction or Rehabilitation New Construction
4) Address(s) or Location Description 8007 Burnet Road, Austin, TX 78757		5) Mobility Bond Corridor Burnet Rd
6) Census Tract 18.18	7) Council District District 7	8) Elementary School WOOTEN EL
9) Affordability Period 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	12					12
Up to 40% MFI	12					12
Up to 50% MFI	37					37
Up to 60% MFI						0
Up to 80% MFI						0
Up to 120% MFI						0
No Restrictions						0
Total Units	61	0	0	0	0	61

14) Summary of Units for Sale at MFI Level

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

15) Initiatives and Priorities (of the Affordable Units)

Initiative	# of Units	Initiative	# of Units
Accessible Units for Mobility Impairments	7	Continuum of Care Units	9
Accessible Units for Sensory Impairments	2		

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

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

20) Estimated Sources and Uses of funds

<u>Sources</u>	
Debt	
Equity	
Grant	1,789,230
Other	10,190,078
Deferred Developer Fee (not applicable for OHDA)	
Previous AHFC Funding	6,000,000
Current AHFC Request	300,000

<u>Uses</u>	
Acquisition	2,905,592
Off-Site	-
Site Work	1,171,740
Sit Amenities	
Building Costs	10,821,918
Contractor Fees	919,402
Soft Costs	1,419,979
Financing	675,000
Developer Fees	365,677

Total \$ 18,279,308

Total \$ 18,279,308

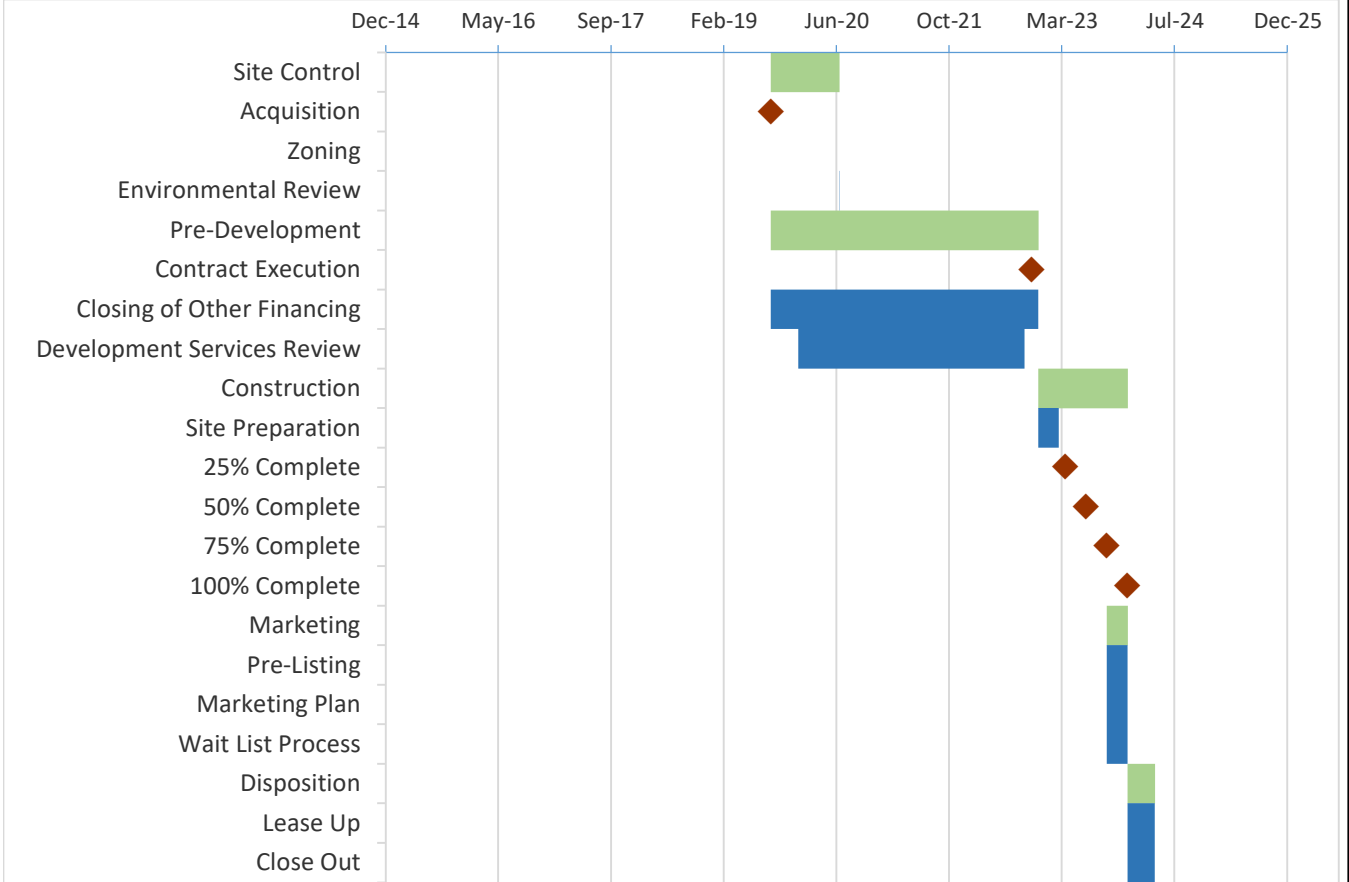
**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

APPLICATION TABS

Tab A3 – Project Timeline

Development Schedule

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



**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A4 – Development
Budget**

Development Budget

	Total Project Cost	Requested AHFC Funds	Description
Pre-Development			
Appraisal			
Environmental Review	3,250		
Engineering	203,250		
Survey			
Architectural	548,147		
Subtotal Pre-Development Cost	\$754,647	\$0	
Acquisition			
Site and/or Land	2,900,000		
Structures			
Other (specify)	5,592		closing costs
Subtotal Acquisition Cost	\$2,905,592	\$0	
Construction			
Infrastructure			
Site Work	1,109,240	300000	
Demolition	62,500		
Concrete	613,500		
Masonry	159,712		
Rough Carpentry	683,345		steel/stairs
Finish Carpentry	2,199,547		framing/Hardie/soffits
Waterproofing and Insulation	490,530		
Roofing and Sheet Metal	326,050		
Plumbing/Hot Water	818,752		includes fire sprinkler
HVAC/Mechanical	669,435		
Electrical	1,223,885		
Doors/Windows/Glass	876,913		
Lath and Plaster/Drywall and Acoustical	513,155		
Tiel Work	206,426		
Soft and Hard Floor	279,365		
Paint/Decorating/Blinds/Shades	304,124		
Specialties/Special Equipment	64,504		
Cabinetry/Appliances	146,095		
Carpet			
Other (specify)	1,358,277		contractor fees, insurance, bond, elevator
Construction Contingency	350,763		
Subtotal Construction Cost	\$12,456,118	\$300,000	\$12,393,618
Soft & Carrying Costs			
Legal			
Audit/Accounting			
Title/Recordin	80,000		
Architectural (Inspections)	15,000		
Construction Interest	465,000		
Construction Period Insurance	7,000		
Construction Period Taxes	0		
Relocation	0		
Marketing	0		
Davis-Bacon Monitoring	0		
Developer Fee	365,677		owners rep and financing consultants
Other (specify)	1,230,274		reserve, loan fees, title costs, FFE, owner work, holding costs
Subtotal Soft & Carrying Costs	\$2,162,951	\$0	
TOTAL PROJECT BUDGET	\$18,279,308	\$300,000	



PROJECT BUDGET SUMMARY SHEET



Burnet Place GMP Budget Exhibit X Austin, TX	Bid Date: 11/1/2022		
	Project Size: 38,328		
Trade Categories	GMP 6/10/22 Adj. Total W/ Contingency	Revised GMP 11/1/22 Adj. Total W/ Contingency	Delta
SWPPP/General Requirements	56,672	56,929	257
Demo/Sitework	275,500	275,500	0
Striping/Powerwashing	6,299	6,299	0
Termite Control	3,194	3,168	(25)
Utilities/Rain Gardens	276,180	299,270	23,090
Landscape/Site Improvements	465,798	493,868	28,070
Concrete	598,872	613,500	14,628
Gypcrete	122,149	123,000	851
Masonry	39,321	36,712	(2,608)
Steel / Stairs	738,190	683,345	(54,845)
Framing/Hardie/Soffits	2,141,634	2,765,531	623,898
Glazed Exterior Tile	274,037	249,726	(24,311)
Millwork/Countertops	305,444	256,471	(48,973)
Insulation	125,370	124,418	(952)
Waterproofing	133,612	366,112	232,500
Roofing	210,685	299,800	89,115
Awnings ALLOWANCE	26,250	26,250	0
Storefront/Glazing	164,504	163,497	(1,008)
Windows	97,763	139,225	41,462
Doors/Hardware	574,736	659,091	84,355
Gyp Bd	525,982	513,155	(12,827)
Paint	242,399	266,013	23,613
Flooring	272,757	279,365	6,608
Specialties	67,717	64,504	(3,214)
Appliances	127,210	121,850	(5,360)
Kitchen Equipment	36,287	24,245	(12,042)
Window Treatments	38,772	38,111	(661)
Elevators	100,961	106,158	5,197
Fire Sprinkler	101,090	105,727	4,637
Plumbing	671,800	713,025	41,225
Mechanical	669,435	669,435	0
Electrical	999,101	1,153,400	154,299
Fire Alarm	45,665	70,485	24,820
Low Voltage Systems by others	0	0	0
GCs	511,710	511,710	0
Insurance	239,827	266,159	26,332
Bond	95,007	96,559	1,551
SUBTOTAL	\$11,381,930	\$12,641,612	1,259,682
ALLOWANCES:	Check 11,381,930	Check 12,619,199	



PROJECT BUDGET SUMMARY SHEET



Allowances

ERRS	\$55,000	\$55,000	0
Screened Porch Custom Fixture	\$10,000	\$0	(10,000)
Testing & Inspection	\$0	\$0	0
Austin Energy Fees	\$0	\$0	0
Change Partial Glazed Tile to Stucco or Hardie		(\$43,300)	
Eliminate Bond (not accepted)		\$0	
Insurance Requirements		(\$30,000)	
Change Fuild Applied to Zip R-Sheathing		(\$111,955)	
Change Equitone Sys to Hardie Sys		(\$710,500)	
Delete Exterior Traffic Coating		(\$23,865)	
Doors/Hardware		(\$84,900)	
	\$0	\$0	0
TOTAL ALLOWANCES:	\$65,000	(\$949,519)	(1,014,519)
CM FEE	\$354,029	\$350,763	(3,266)
Contingency	\$354,029	\$350,763	(3,266)
REMODEL TAX	\$0	\$0	
TOTAL	\$12,154,988	\$12,393,618	238,630

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A5 – Operating
Proforma**

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

APPLICATION TABS

Tab A6 – Scoring Sheet

Project Name	urnet Place Apartments	
Project Type	100% Affordable	
Council District	District 7	
Census Tract	18.18	
Prior AHFC Funding	\$6,000,000	
Current AHFC Funding Request Amount	\$300,000	
Estimated Total Project Cost	\$18,279,308	
High Opportunity	No	
High Displacement Risk	YES	
High Frequency Transit	Yes	
Imagine Austin	Yes	
Mobility Bond Corridor	Burnet Rd	
SCORING ELEMENTS		Description
UNITS		
< 20% MFI	0	# of rental units at < 20% MFI
< 30% MFI	12	# of rental units at < 30% MFI
District Goal	11%	% of City's affordable housing goal
High Opportunity	FALSE	% of City's affordable housing goal for high opportunity areas
Displacement Risk	5%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	15%	% of City's affordable housing goal near high frequency transit
Imagine Austin	15%	% of City's affordable housing goal in imagine austin corridors
Geographic Dispersion	9%	% of City's affordable housing goal to increase geographic dispersion
Mobility Bond Corridor	6%	% of City's affordable housing goal within mobility bond corridors
SCORE	4	% of annual goal * units * 50%, max of 75
< 40% MFI	12	# of rental units at < 40% MFI
< 50% MFI	37	# of rental units at < 50% MFI
District Goal	11%	% of City's affordable housing goal
High Opportunity	FALSE	% of City's affordable housing goal for high opportunity areas
Displacement Risk	5%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	15%	% of City's affordable housing goal near high frequency transit
Imagine Austin	15%	% of City's affordable housing goal in imagine austin corridors
Geographic Dispersion	9%	% of City's affordable housing goal to increase geographic dispersion
Mobility Bond Corridor	6%	% of City's affordable housing goal within mobility bond corridors
SCORE	8	% of annual goal * units * 25%, max of 75
< 60% MFI	0	# of units for purchase at < 60% MFI
District Goal	11%	% of City's affordable housing goal
High Opportunity	FALSE	% of City's affordable housing goal for high opportunity areas
Displacement Risk	5%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	15%	% of City's affordable housing goal near high frequency transit
Imagine Austin	15%	% of City's affordable housing goal in imagine austin corridors
Geographic Dispersion	9%	% of City's affordable housing goal to increase geographic dispersion
Mobility Bond Corridor	6%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 50%, max of 75
< 80% MFI	0	# of units for purchase at < 80% MFI
District Goal	11%	% of City's affordable housing goal
High Opportunity	FALSE	% of City's affordable housing goal for high opportunity areas
Displacement Risk	5%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	15%	% of City's affordable housing goal near high frequency transit
Imagine Austin	15%	% of City's affordable housing goal in imagine austin corridors
Geographic Dispersion	9%	% of City's affordable housing goal to increase geographic dispersion
Mobility Bond Corridor	6%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 25%, max of 75
Unit Score	11	MAXIMUM SCORE = 300
INITIATIVES AND PRIORITIES		
Continuum of Care	9	Total # of units provided up to 100 per year
Continuum of Care Score	3	(total CoC Units/100 + HF Units/50)*20
Access to Healthy Food	Yes	Within 1 Mile of Healthy Food (City GIS)
Continuum of Care Weighted Score	2	Mobility, Access to Jobs, Community Institutions, Social Cohesion
2 Bedroom Units	0	Total Affordable 2 Bedroom units
3 Bedroom Units	0	Total Affordable 3 Bedroom units
4 Bedroom Units	0	Total Affordable 4+ Bedroom units
Multi-Generational Housing Score	0	Multi-bedroom Unit/Total Units * 20
TEA Grade	87	Elementary School Rating from TEA
Multi-Generational Housing Weighted Score	0	Educational Attainment, Environment, Community Institutions, Social Cohesion, E
Accessible Units	9	mobility and sensory units
Non-PSH, Non-Voucher Under 20% MFI	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	9	MAXIMUM SCORE = 200
UNDERWRITING		
AHFC Leverage	34%	% of total project cost funded through AHFC request
Leverage Score	12	3 points per 5% reduction in leverage below 50% (max 30)
AHFC Per Unit Subsidy (including prior amounts)	\$103,279	Amount of assistance per unit
Subsidy per unit score	12	(\$200,000 - per unit subsidy)*25/\$200,000
AHFC Per Bedroom Subsidy	\$103,279	Amount of assistance per bedroom
Subsidy per Bedroom Score	12	(\$200,000 - per bedroom subsidy)*25/\$200,000
Debt Coverage Ratio (Year 5)	1.00	Measured at the 5 Year mark
Debt Coverage Ratio Score	0	Minimum = 1.0; Maximum = 1.5; 1.25 = best score
Underwriting Score	36	MAXIMUM SCORE = 100
APPLICANT		
FINAL QUANTITATIVE SCORE	56	THRESHOLD SCORE = 50
Previous Developments		
Compliance Score		
Proposal		
Supportive Services		
Development Team		
Management Team		
Notes		

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 1 – Entity Information

**1a. Detailed listing of developer's
experience**

Development Experience

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

- **Hospice and Recuperative Care:**

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

- **Affordable, Intensely Supportive Housing:**

Roosevelt Gardens – 5606 Roosevelt Avenue – Originally 22 rental units that Project Transitions has owned and operated since 1995 – Scrape and newly constructed apartment community completed in 2022 with 40 new rental units.

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

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

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

PROJECT TRANSITIONS, INC. is not a newcomer to affordable housing development.

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

The rebirth of Roosevelt Gardens into 40 newly constructed units completed in July 2022. The \$9M total development budget included \$4.95M from the City of Austin and \$3M from the Texas Department of Housing and Community Affairs.

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

JENNIFER HICKS of True Casa Consulting – the lead consultant engaged by PT for the development of Burnet Place Apartments - has been developing mission-rich, affordable housing for her entire career. Hicks also possesses extensive experience with the following housing programs:

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

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

- | | |
|---|---|
| 1) Development and Financing Consultant: | Jennifer Hicks with True Casa Consulting, LLC |
| 2) Architect: | Michael Hsu Office of Architecture |
| 3) Civil Engineer: | Big Red Dog, a division of WGI |
| 4) General Contractor: | Lott Brothers |
| 5) Owner Representative: | Texas Capital Project Management |
| 6) Co-Developer: | Art Carpenter of Ardent Residential |

Please see **PRINCIPALS INFORMATION** for more information on the partners curated for the Burnet Place Apartment development.

Roles of Key Staff and Qualifications:

Leah Baker – Interim Executive Director – leads organization and member of development team

Madge Whistler – Chief Operating and Financial Officer – handles construction accounting and member of development team

Jessica Schriilo - Housing Program Manager– oversees property management

Amanda Smallwood – Facilities Manager – oversees asset management of PT’s portfolio

Todd Logan – Grants and Special Projects – oversees compliance

PROJECT TRANSITIONS' PORTFOLIO OF HOUSING

Property Name	# of Units	Address	Completion Date	Target Population	Development Cost
Doug's House	5 beds	1213 Justin Lane, Austin, TX	1989	People Living with HIV and AIDS - Hospice	\$1 donated property and the new construction was donated in-kind by home builder
Roosevelt Gardens	22	5606 Roosevelt Avenue, Austin, TX	1995	People Living with HIV and AIDS – Supportive Housing	\$480,000 Acquisition
Highland Terrace	8	7107 Guadalupe, Austin, TX	1998	People Living with HIV and AIDS – Supportive Housing	\$198,000 Acquisition
Roosevelt Gardens Redevelopment	40		July 2022	People Living with HIV and AIDS – Supportive Housing	\$9,000,000

05/18-6/22 Lone Star Medical Transport Executive Director

- Responsible for 3 operations (Dallas, Austin, Houston)
- Leads a team of 8 dispatchers and 50+ drivers to serve the Austin and surrounding area
- Increased revenue from \$120K a month to \$330K a month (Austin area)
- Regularly achieves 15%+ EBIT
- Full P&L responsibility
- Reports on KPIs and lead indicators - makes data driven decisions
- Regularly conducts autopsies without blame to deconstruct problems in order to solve them
- Manages monthly expense report
- Markets service to prospective accounts
- Manages hiring process from start to finish including orientation and on-boarding
- Works closely with Financial, Legal, IT, Compliance, HR and Risk Management
- Reports directly to CEO and maintains supportive collaborative relationship with other EDs
- Trains new EDs and new leaders in the CIT program
- Adept at finding best and cost-effective vendors to stay within budget
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- Managed a team of three full time employees
- Closing ratio 52%
- Excellent customer service & conflict resolution skills
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- Approved lease files and audits all move in and renewal files

- Processed all move outs and scheduled turns
- Processed all evictions and skips in a timely manner
- Distributed renewal offers – coordinated/followed up to increase resident retention
- Inputs all NTVs and tries to save if possible
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- Managed all social media accounts
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- Delinquency at \$54.00 with over \$661,567 collected
- Maintained accurate collections binder every month
- Collaborated with Property Manager and maintenance on heavy turns and special projects
- Assisted Property Manager with resident complaints/concerns and any special projects assigned
- Wrote staff schedule and ordered all office supplies
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- Managed the leasing staff of 6 and marketing of 600 units on South Lamar
- Conducted weekly market survey and shopped comps on regular basis
- Implemented a weekly leasing report for Property Manager and Regional VP
- Audited all applicant files
- Raised online reputation – specifically with Apartment Ratings and Yelp
- Maximized online presence with Zillow, Twitter, Facebook, Instagram, Nextdoor, and Google Maps
- Developed marketing calendar
- Ordered all marketing collateral while staying within budget
- Organized large resident events i.e. brunches, food truck night, yappy hour and many more
- Motivated our team to increase leases through training, leadership workshops, and rewards
- Focused on improving J Turner survey results
- Coached leasing staff on shops – recently a team member received a 100 (so proud!)
- Maintained a closing ratio of at least 38% (some months it was over 40%)
- Conducted a complete resident file audit on 600 units
- Property sale was final in June 2014 – helped stabilize through the transition from Yardi to OneSite

10/12-11/13 DHI Mortgage CAD Appraisal Specialist

- Assisted underwriting, processing, origination, closing and post-closing to ensure a smooth appraisal process
- Assisted production offices, branches and regional processing centers regarding appraisal status and receipt
- Analyzed residential appraisals and electronically uploaded appraisal reports, records data, processed invoices
- Monitored the appraisal queue and reports on a daily basis to identify loans that need appraisals, corrections, and/or FHA/VA case numbers
- Ordered appraisals according to rotation procedures and requirements
- Monitored approved appraiser list for investor requirements and license expirations

- Monitored appraisal tracking reports
- Liaison between appraisers and branches for all communication
- Reviewed and cleared underwriting conditions in relation to final inspections and corrections
- Queued VA appraisals to appropriate underwriter per guidelines
- Assisted CAD manager with special projects & processing appraiser applications

05/11-10/12 Shadowbrook (Camden) Senior Leasing Consultant

- Supported 496 units at Camden Shadow Brook
- Assisted residents with work orders, concerns and conflict resolution
- Advanced experience with OneSite including accounting components
- Adept at processing payments, collections, managing delinquency, and close out procedures
- Cross trained on all Assistant Manager duties and procedures
- Increased closing ratio to over 39%
- Utilized social media for marketing and public relations
- Consistently exceeded leasing goals and earned top leasing award company wide
- Managed new lease documents, prepared applicant files for approval
- Mentored new employees and coached them on Camden policies and procedures
- Maintained weekly market surveys
- Organized resident events
- Worked closely with vendors to support property needs
- Contributed to Camden culture on a regular basis - #7 on Forbes list

Education

BS Public Relations – Magna Cum Laude Texas State University (Eat'em up Cats!!!)

Completed TALA certification for Assisted Living Executive Director in 2018

I consider myself a lifelong learner and read 1 non-fiction and 1 fiction book a month

-Currently reading Multipliers by Liz Wiseman

MADGE WHISTLER

Finance & NFP Mgmt Professional



mwhistle@swbell.net
512.850.4540

BACKGROUND

Experienced, results driven professional in the high technology and non-profit sectors; solid business knowledge having held positions in marketing, operations, business development, R&D, finance, and high priority projects in roles of ever-increasing responsibility at both Hewlett-Packard and Data General



Austin, TX
2014-2021 **CFO/COO**
Non-Profit Agency



Cupertino and Mountain View, CA

2001-2002 **Marketing Manager**
Business Strategy & Reinvention Programs

2000-2001 **Marketing Manager**
E*Services, Commerce for the Millennium

1997-2000 **Americas Marketing Center Manager**
HP Services

1996-1997 **Worldwide Channel Marketing Manager**
HP Services

1995-1996 **Hardware Support Alliances Program Manager**
Customer Support and Services Group

1991-1995 **Product Marketing Manager**
Customer Support and Services Group

1990-1991 **Sales Development Manager**
Worldwide Customer Support Operations

1989-1990 **Big Deals Program Manager**
Worldwide Customer Support Operations

1988-1989 **Sales Development Engineer**
Worldwide Customer Support Operations



Research Triangle Park, NC and Durham, NH

1986-1987 **Product Marketing Specialist**
Volume Products Division

1985-1986 **R&D Product Development Coordinator**
RTP R&D Laboratory

1983-1985 **Financial Analyst**
RTP R&D Laboratory

EDUCATION

1995 HP Functional Management Training

1983 
B.S. Business Administration-Accounting
University of North Carolina, Chapel Hill

HIGHLIGHTS

- ✓ Non-profit Fund Accounting: transitioned agency financial management systems to true fund accounting
- ✓ Broad Marketing Range: product marketing, channel marketing, marketing communications, business development, executive messaging
- ✓ Business to Business Expertise: OEM relationship management, channel marketing
- ✓ High Impact Cost Reduction Initiative: achieved 65% reduction in operational cost structure for \$500M services business
- ✓ Corporate Culture Leadership: developed organization standards and operating philosophy through grassroots front-line employee and customer involvement
- ✓ Extensive Business Development Experience: sales development, "must-win" opportunities, outbound marketing programs
- ✓ Robust Back Office Competencies: software literate, process improvements and efficiencies
- ✓ Startup mentality, focused, classic Myers-Brigg INTJ, comfortable in challenging environments

VOLUNTEER ACTIVITIES



Downtown Austin Crime Reduction Initiative



Secretary, Downtown Austin Neighborhood Association

OTHER PURSUITS

- Running
- Photography
- Home automation

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

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

EDUCATION

UNIVERSITY OF TEXAS, AUSTIN
UNIVERSITY OF SOUTH FLORIDA

Masters, Social Work, 1993
Bachelors, Sociology, 1983

KNOWLEDGE AND SKILLS

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

EXPERIENCE

Director of Client Services, April 2016 to present

PROJECT TRANSITIONS, INC.

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

Special Projects Coordinator, January 2015 to March 2016

TEXAS DEPT OF STATE HEALTH SERVICES

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

Service Integration Coordinator, October 2010 to December 2014

TEXAS DEPT OF STATE HEALTH SERVICES

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

Special Projects Coordinator, January 2006 to September 2010

TEXAS DEPT OF STATE HEALTH SERVICES

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

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

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

EXPERIENCE (CONTINUED)

Training Specialist IV, November 1999 to December 2005

TEXAS DEPT OF STATE HEALTH SERVICES

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

Educational Services Specialist, January 1992 to October 1999

TEXAS DEPT OF HUMAN SERVICES

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

Social Service Supervisor, November 1989 to December 1991

TEXAS DEPT OF HUMAN SERVICES

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

Eligibility Worker III, November 1988 to October 1989

TEXAS DEPT OF HUMAN SERVICES

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

Social Service Supervisor, November 1986 to June 1987

FLORIDA DEPT OF HEALTH

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

OTHER EXPERIENCE

Adolescent and Family Counselor

YOUTH OPTIONS (LIFEWORKS)

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

Therapist

WATERLOO COUNSELING CENTER,

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

Group Facilitator

OUTYOUTH, AUSTIN

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

Jessica Schrillo

(She/They)

6713 Panda Royle Dr.
Del Valle, TX 78617
(512) 470-1949
rschrillo@gmail.com

EDUCATION

**Midwestern State University, Wichita Falls, Texas—
Bachelor of Science in Psychology with a minor in Biology**

Graduated December 2018

Relevant Coursework

Human Behavior, Substance use, Health Psychology

EXPERIENCE

Project Transitions, Austin, Texas—Program Manager,

May 2019 - Present

Managed 3 properties with 27 households in the HOPWA TSH program, Performed Maintenance requests, Developed Policies and Procedure, Built and managed a team of 5 staff to operate the program.

Vivent Health, Austin, Texas— Case Manager,

May 2019 - May 2021

Provide homeless prevention and rehousing services to a caseload of 60 clients while providing statistical data to the Department of Housing and Urban Development. Working with a variety of different people to overcome barriers that prevent stable housing.

San Gabriel Crisis Respite, Georgetown, Texas—Residential Specialist,

June 2017 - August 2018

Provide healthy meals and administer medications to up to 12 clients with a variety of presenting mental illnesses. Foster a safe environment for clients, Assist psychologists in treatment plans for clients.

SEEK Camp, Pottsboro, Texas— Counselor

May 2016-Present

Assisting up to 8 Adults with mental disabilities with their daily needs while ensuring they had a fun time at camp.

SKILLS

CPR/BLS,

Customer Service,

IBM-SPSS,

Certifications

Trauma Informed Care,

Transforming Health,

Mental Health First Aid,

AWARDS

Boy Scouts of America

(2007–Present)

Life Scout rank, Order of the Arrow

Wesley Foundation

(2014–present)

AJ SMALLWOOD

AUSTIN, TX 512.748.7596 asmallworld2243@gmail.com

PROFESSIONAL EXPERIENCE

INDEPENDENT CONTRACTOR/SELF EMPLOYED

HANDY MA'AM, AUSTIN, TX

02.2022 - Current

- Create and advertise brand to the greater Austin area, utilizing digital and physical spaces to reach customers
- Effectively maintained relationships using customer service, providing consistent outcomes, etc with management companies, as well as individual homeowners to attract repeat business
- Perform varying types repairs, replacements, installations, assemblies, using personal knowledge and in-depth research
- Complete walkthrough of properties alone as well as with property owners in order to produce accurate and affordable quotes for cost of repair
- Prepare best course of action and required materials ahead of time to utilize time effectively in order to complete multiple work orders a day
- Maintain clean, safe, and organized work space while on site
- Utilize free time researching methods of repairs/replacements, troubleshooting tips, common household failures, etc in order to gain knowledge from other professionals

SENIOR, ASSEMBLY TECHNICIAN II

AYRO INC, AUSTIN, TX

10.2017 - 02.2022

- AYRO designs and manufactures compact, purpose-built, automotive-grade electric vehicles used as part of a fleet on university and corporate campuses, for commercial and urban delivery, etc.
- Responsible to conduct end of line inspection/sign off on vehicles prior to market
- Use software to program vehicle speed
- Created and update quality/final inspection checklists
- Perform quality and final inspection prior to sale
- Review checklists to ensure all tasks were completed at each station in proper order
- National Travel to perform repairs on customer vehicles post-sale at the customer site
- Conduct brake installations/repair, alignments, standard/custom exterior, and interior painting
- Repair and troubleshoot electrical and mechanical issues-faulty wiring, cracks in plastic, stripped lug nuts, drive-shafts, etc
- Operate forklift in a warehouse setting for the organization of products and inventory
- Continually conducted research and experimentation to improve assembly processes and the quality of vehicles

INDEPENDENT CONTRACTOR / ASSEMBLY & INSTALLATION TECHNICIAN

HANRAHAN ASSEMBLY, AUSTIN, TX

4.2017 - 10.2017

- Maintain partnership with 3rd party retailers providing efficient and effective customer service
- Communicate build plan with the client and maintain a relationship for the duration of project
- In-state and local travel to customer locations to perform assembly of residential and commercial furniture, including, but not limited to; desks, dressers, modular closets, tables, bookshelves, etc.
- Out-of-State travel for new build IKEA stores and interior retail set-up (furniture build per blueprints and layouts)
- Ability to using hand and power tools
- Specialty: custom installations. Mounting televisions, floating entertainment systems, various shelving and multi-units

AJ SMALLWOOD

AUSTIN, TX 512.748.7596 asmallworld2243@gmail.com

PROJECT MANAGER (2015 - 2017)

2012 - 2.2017

DRIVELINE RETAIL INC., COPPELL, TX

- Responsible for overseeing the interior construction for 50 Dollar General new builds across the Mid-Western and Eastern United States to company specifications and within the contracted deadline
- Supervision of the installation crew (12-20) for coordinations of the interior layout of aisles, registers and departments to speculations and blueprints
- Manage project hours and maintain labor, material and equipment/tool budget
- Review PDF of CAD Blueprints for stores, review preliminary issues with cable, internet, lighting, electric install, structural construction and/or property excavation
- Visit pre-existing stores to draw out the aisle layout, take measurements, transfer to graph-paper and create accurate depictions of store-product layouts for future store remodels and new constructions
- Keep auditing notes of stores adherence to company standards and brand compliance
- Oversaw stocking crew and Store Manager for store openings
- Plan-o-gram and blueprint adherence

HEAVY RESET SPECIALIST / HEAVY PROJECT MERCHANDISER (2012 - 2015)

DRIVELINE RETAIL INC., COPPELL, TX

- Assist the Project Manager
- Personally performing and working with the team to complete the construction of new build interior store layouts based off plan-o-gram, store blueprints and verbal instructions
- Personally performing and working with the team to complete the instore-resets of product in conjunction based off plan-o-gram, store blueprints and verbal instructions
- Resolving preliminary floor-set issues

ASSISTANT MANAGER

LITTLE CAESARS, ASHLAND, KY

9.2010 - 2.2012

- Accountable for customer satisfaction for a 100 seat dine-in and carry out location
- Assist the GM in the recruiting, hiring, training and retention of 20-25 employees
- Assist the GMr with payroll, benefits enrollment, and employee schedules

FEDERAL STUDENT EMPLOYEE

JOB CORPS, PRESTONSBURG, KY

2.2009 - 8.2010

- Job Corps is the largest nationwide residential career training program in the country
- Conduct facility maintenance, basic carpentry, basic electrical in the residential & commercial sector

COMMUNITY SERVICE

BRAND AMBASSADOR, HELPING THE HOMELESS, ATX

2018 - CURRENT

TECHNICAL SKILLS

BAND SAW, MITER SAW, TABLE SAW, CIRCULAR SAW, GRINDERS, DRILLS, SANDERS, PNEUMATIC TOOLS, HAND TOOLS. ABILITY TO DRIVE BOX TRUCKS, SCISSOR LIFT, FORKLIFT

FORKLIFT CERTIFIED, OSHA CERTIFIED

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 1 – Entity Information

1b. Certificate of Status



Office of the Secretary of State

Certificate of Fact

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

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

In testimony whereof, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in Austin, Texas on November 02, 2022.



A handwritten signature in black ink, appearing to read "John B. Scott".

John B. Scott
Secretary of State

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 1 – Entity Information

1c. Statement of Confidence

Project Transitions has housing experience in the City of Austin with the new construction and completion of Roosevelt Gardens.

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 2 – Principals Info

2a. Resumes of principals

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- Implemented a weekly leasing report for Property Manager and Regional VP
- Audited all applicant files
- Raised online reputation – specifically with Apartment Ratings and Yelp
- Maximized online presence with Zillow, Twitter, Facebook, Instagram, Nextdoor, and Google Maps
- Developed marketing calendar
- Ordered all marketing collateral while staying within budget
- Organized large resident events i.e. brunches, food truck night, yappy hour and many more
- Motivated our team to increase leases through training, leadership workshops, and rewards
- Focused on improving J Turner survey results
- Coached leasing staff on shops – recently a team member received a 100 (so proud!)
- Maintained a closing ratio of at least 38% (some months it was over 40%)
- Conducted a complete resident file audit on 600 units
- Property sale was final in June 2014 – helped stabilize through the transition from Yardi to OneSite

10/12-11/13 DHI Mortgage CAD Appraisal Specialist

- Assisted underwriting, processing, origination, closing and post-closing to ensure a smooth appraisal process
- Assisted production offices, branches and regional processing centers regarding appraisal status and receipt
- Analyzed residential appraisals and electronically uploaded appraisal reports, records data, processed invoices
- Monitored the appraisal queue and reports on a daily basis to identify loans that need appraisals, corrections, and/or FHA/VA case numbers
- Ordered appraisals according to rotation procedures and requirements
- Monitored approved appraiser list for investor requirements and license expirations

- Monitored appraisal tracking reports
- Liaison between appraisers and branches for all communication
- Reviewed and cleared underwriting conditions in relation to final inspections and corrections
- Queued VA appraisals to appropriate underwriter per guidelines
- Assisted CAD manager with special projects & processing appraiser applications

05/11-10/12 Shadowbrook (Camden) Senior Leasing Consultant

- Supported 496 units at Camden Shadow Brook
- Assisted residents with work orders, concerns and conflict resolution
- Advanced experience with OneSite including accounting components
- Adept at processing payments, collections, managing delinquency, and close out procedures
- Cross trained on all Assistant Manager duties and procedures
- Increased closing ratio to over 39%
- Utilized social media for marketing and public relations
- Consistently exceeded leasing goals and earned top leasing award company wide
- Managed new lease documents, prepared applicant files for approval
- Mentored new employees and coached them on Camden policies and procedures
- Maintained weekly market surveys
- Organized resident events
- Worked closely with vendors to support property needs
- Contributed to Camden culture on a regular basis - #7 on Forbes list

Education

BS Public Relations – Magna Cum Laude Texas State University (Eat'em up Cats!!!)

Completed TALA certification for Assisted Living Executive Director in 2018

I consider myself a lifelong learner and read 1 non-fiction and 1 fiction book a month

-Currently reading Multipliers by Liz Wiseman

MADGE WHISTLER

Finance & NFP Mgmt Professional



mwhistle@swbell.net
512.850.4540

BACKGROUND

Experienced, results driven professional in the high technology and non-profit sectors; solid business knowledge having held positions in marketing, operations, business development, R&D, finance, and high priority projects in roles of ever-increasing responsibility at both Hewlett-Packard and Data General



Austin, TX
2014-2021 **CFO/COO**
Non-Profit Agency



Cupertino and Mountain View, CA

2001-2002 **Marketing Manager**
Business Strategy & Reinvention Programs

2000-2001 **Marketing Manager**
E*Services, Commerce for the Millennium

1997-2000 **Americas Marketing Center Manager**
HP Services

1996-1997 **Worldwide Channel Marketing Manager**
HP Services

1995-1996 **Hardware Support Alliances Program Manager**
Customer Support and Services Group

1991-1995 **Product Marketing Manager**
Customer Support and Services Group

1990-1991 **Sales Development Manager**
Worldwide Customer Support Operations

1989-1990 **Big Deals Program Manager**
Worldwide Customer Support Operations

1988-1989 **Sales Development Engineer**
Worldwide Customer Support Operations



Research Triangle Park, NC and Durham, NH

1986-1987 **Product Marketing Specialist**
Volume Products Division

1985-1986 **R&D Product Development Coordinator**
RTP R&D Laboratory

1983-1985 **Financial Analyst**
RTP R&D Laboratory

EDUCATION

1995 HP Functional Management Training

1983 
B.S. Business Administration-Accounting
University of North Carolina, Chapel Hill

HIGHLIGHTS

- ✓ Non-profit Fund Accounting: transitioned agency financial management systems to true fund accounting
- ✓ Broad Marketing Range: product marketing, channel marketing, marketing communications, business development, executive messaging
- ✓ Business to Business Expertise: OEM relationship management, channel marketing
- ✓ High Impact Cost Reduction Initiative: achieved 65% reduction in operational cost structure for \$500M services business
- ✓ Corporate Culture Leadership: developed organization standards and operating philosophy through grassroots front-line employee and customer involvement
- ✓ Extensive Business Development Experience: sales development, "must-win" opportunities, outbound marketing programs
- ✓ Robust Back Office Competencies: software literate, process improvements and efficiencies
- ✓ Startup mentality, focused, classic Myers-Brigg INTJ, comfortable in challenging environments

VOLUNTEER ACTIVITIES



Downtown Austin Crime Reduction Initiative



Secretary, Downtown Austin Neighborhood Association

OTHER PURSUITS

- Running
- Photography
- Home automation

Jessica Schrillo

(She/They)

6713 Panda Royle Dr.
Del Valle, TX 78617
(512) 470-1949
rschrillo@gmail.com

EDUCATION

**Midwestern State University, Wichita Falls, Texas—
Bachelor of Science in Psychology with a minor in Biology**

Graduated December 2018

Relevant Coursework

Human Behavior, Substance use, Health Psychology

EXPERIENCE

Project Transitions, Austin, Texas—Program Manager,

May 2019 - Present

Managed 3 properties with 27 households in the HOPWA TSH program, Performed Maintenance requests, Developed Policies and Procedure, Built and managed a team of 5 staff to operate the program.

Vivent Health, Austin, Texas— Case Manager,

May 2019 - May 2021

Provide homeless prevention and rehousing services to a caseload of 60 clients while providing statistical data to the Department of Housing and Urban Development. Working with a variety of different people to overcome barriers that prevent stable housing.

San Gabriel Crisis Respite, Georgetown, Texas—Residential Specialist,

June 2017 - August 2018

Provide healthy meals and administer medications to up to 12 clients with a variety of presenting mental illnesses. Foster a safe environment for clients, Assist psychologists in treatment plans for clients.

SEEK Camp, Pottsboro, Texas— Counselor

May 2016-Present

Assisting up to 8 Adults with mental disabilities with their daily needs while ensuring they had a fun time at camp.

SKILLS

CPR/BLS,

Customer Service,

IBM-SPSS,

Certifications

Trauma Informed Care,

Transforming Health,

Mental Health First Aid,

AWARDS

Boy Scouts of America

(2007–Present)

Life Scout rank, Order of the Arrow

Wesley Foundation

(2014–present)

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

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

EDUCATION

UNIVERSITY OF TEXAS, AUSTIN
UNIVERSITY OF SOUTH FLORIDA

Masters, Social Work, 1993
Bachelors, Sociology, 1983

KNOWLEDGE AND SKILLS

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

EXPERIENCE

Director of Client Services, April 2016 to present

PROJECT TRANSITIONS, INC.

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

Special Projects Coordinator, January 2015 to March 2016

TEXAS DEPT OF STATE HEALTH SERVICES

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

Service Integration Coordinator, October 2010 to December 2014

TEXAS DEPT OF STATE HEALTH SERVICES

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

Special Projects Coordinator, January 2006 to September 2010

TEXAS DEPT OF STATE HEALTH SERVICES

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

TODD LOGAN, LMSW

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

EXPERIENCE (CONTINUED)

Training Specialist IV, November 1999 to December 2005 TEXAS DEPT OF STATE HEALTH SERVICES
Provide classroom instruction, skill building, on-site session observation and feedback to new staff on risk assessment and behavior change counseling. Act as point person for new system of 18 different group and community-level evidenced-based interventions implemented across 30 agencies. Provide technical assistance, on-site session observation and feedback, consult with original researchers and act on over 40 requests to tailor programs. Develop statewide technical assistance bulletins. Additionally, provide instruction and technical assistance on measuring client behavior change following engagement in these psycho-educational interventions; assist all contractors in setting goals and pre/post measures.

Educational Services Specialist, January 1992 to October 1999 TEXAS DEPT OF HUMAN SERVICES
Provide classroom instruction and on-the-job training to new employees determining eligibility for Food Stamps, Temporary Assistance to Needy Families and Medicaid. As management trainer, provide instruction on civil rights, sexual harassment, supervisory skills and the personnel process. Act as mediator to resolve conflicts in supervisory relationships, mentor supervisors, negotiate performance improvement plans. Act as 2nd level supervisor of training operations with 60 employees for 8-months. Conduct teambuilding for low-performing work groups; Create and facilitate town meetings.

Social Service Supervisor, November 1989 to December 1991 TEXAS DEPT OF HUMAN SERVICES
Supervise 22 staff performing 10 different functions at over-burdened facility serving 10,000 clients. Manage all points of access: scheduling for 20 caseworkers totaling 400 appointments weekly, sign-off on \$500,000 benefit issuance yearly, oversee weekly problem resolution traffic of 350 clients through front desk and 1000 phone calls; handle all client complaints, automate older systems, plan and implement quality assurance measures. Evaluate employee performance, write employee evaluations, hold counseling conferences, set corrective action plans, and implement the personnel process.

Eligibility Worker III, November 1988 to October 1989 TEXAS DEPT OF HUMAN SERVICES
Supervise 5 staff; manage small Medicaid office out-stationed within large public hospital.

Social Service Supervisor, November 1986 to June 1987 FLORIDA DEPT OF HEALTH
Plan and implement new Medicaid unit across 5 public health clinic and hospital locations. Determine sites, build relationships with providers, negotiate logistics, and create systems. Supervise 11 staff; evaluate employee and site performance, manage operations.

OTHER EXPERIENCE

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

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

Group Facilitator OUTYOUTH, AUSTIN
Facilitate weekly peer support groups; one for high school guys and another for men 18-21 years.

AJ SMALLWOOD

AUSTIN, TX 512.748.7596 asmallworld2243@gmail.com

PROFESSIONAL EXPERIENCE

INDEPENDENT CONTRACTOR/SELF EMPLOYED

HANDY MA'AM, AUSTIN, TX

02.2022 - Current

- Create and advertise brand to the greater Austin area, utilizing digital and physical spaces to reach customers
- Effectively maintained relationships using customer service, providing consistent outcomes, etc with management companies, as well as individual homeowners to attract repeat business
- Perform varying types repairs, replacements, installations, assemblies, using personal knowledge and in-depth research
- Complete walkthrough of properties alone as well as with property owners in order to produce accurate and affordable quotes for cost of repair
- Prepare best course of action and required materials ahead of time to utilize time effectively in order to complete multiple work orders a day
- Maintain clean, safe, and organized work space while on site
- Utilize free time researching methods of repairs/replacements, troubleshooting tips, common household failures, etc in order to gain knowledge from other professionals

SENIOR, ASSEMBLY TECHNICIAN II

AYRO INC, AUSTIN, TX

10.2017 - 02.2022

- AYRO designs and manufactures compact, purpose-built, automotive-grade electric vehicles used as part of a fleet on university and corporate campuses, for commercial and urban delivery, etc.
- Responsible to conduct end of line inspection/sign off on vehicles prior to market
- Use software to program vehicle speed
- Created and update quality/final inspection checklists
- Perform quality and final inspection prior to sale
- Review checklists to ensure all tasks were completed at each station in proper order
- National Travel to perform repairs on customer vehicles post-sale at the customer site
- Conduct brake installations/repair, alignments, standard/custom exterior, and interior painting
- Repair and troubleshoot electrical and mechanical issues-faulty wiring, cracks in plastic, stripped lug nuts, drive-shafts, etc
- Operate forklift in a warehouse setting for the organization of products and inventory
- Continually conducted research and experimentation to improve assembly processes and the quality of vehicles

INDEPENDENT CONTRACTOR / ASSEMBLY & INSTALLATION TECHNICIAN

HANRAHAN ASSEMBLY, AUSTIN, TX

4.2017 - 10.2017

- Maintain partnership with 3rd party retailers providing efficient and effective customer service
- Communicate build plan with the client and maintain a relationship for the duration of project
- In-state and local travel to customer locations to perform assembly of residential and commercial furniture, including, but not limited to; desks, dressers, modular closets, tables, bookshelves, etc.
- Out-of-State travel for new build IKEA stores and interior retail set-up (furniture build per blueprints and layouts)
- Ability to using hand and power tools
- Specialty: custom installations. Mounting televisions, floating entertainment systems, various shelving and multi-units

AJ SMALLWOOD

AUSTIN, TX 512.748.7596 asmallworld2243@gmail.com

PROJECT MANAGER (2015 - 2017)

2012 - 2.2017

DRIVELINE RETAIL INC., COPPELL, TX

- Responsible for overseeing the interior construction for 50 Dollar General new builds across the Mid-Western and Eastern United States to company specifications and within the contracted deadline
- Supervision of the installation crew (12-20) for coordinations of the interior layout of aisles, registers and departments to speculations and blueprints
- Manage project hours and maintain labor, material and equipment/tool budget
- Review PDF of CAD Blueprints for stores, review preliminary issues with cable, internet, lighting, electric install, structural construction and/or property excavation
- Visit pre-existing stores to draw out the aisle layout, take measurements, transfer to graph-paper and create accurate depictions of store-product layouts for future store remodels and new constructions
- Keep auditing notes of stores adherence to company standards and brand compliance
- Oversaw stocking crew and Store Manager for store openings
- Plan-o-gram and blueprint adherence

HEAVY RESET SPECIALIST / HEAVY PROJECT MERCHANDISER (2012 - 2015)

DRIVELINE RETAIL INC., COPPELL, TX

- Assist the Project Manager
- Personally performing and working with the team to complete the construction of new build interior store layouts based off plan-o-gram, store blueprints and verbal instructions
- Personally performing and working with the team to complete the instore-resets of product in conjunction based off plan-o-gram, store blueprints and verbal instructions
- Resolving preliminary floor-set issues

ASSISTANT MANAGER

LITTLE CAESARS, ASHLAND, KY

9.2010 - 2.2012

- Accountable for customer satisfaction for a 100 seat dine-in and carry out location
- Assist the GM in the recruiting, hiring, training and retention of 20-25 employees
- Assist the GMr with payroll, benefits enrollment, and employee schedules

FEDERAL STUDENT EMPLOYEE

JOB CORPS, PRESTONSBURG, KY

2.2009 - 8.2010

- Job Corps is the largest nationwide residential career training program in the country
- Conduct facility maintenance, basic carpentry, basic electrical in the residential & commercial sector

COMMUNITY SERVICE

BRAND AMBASSADOR, HELPING THE HOMELESS, ATX

2018 - CURRENT

TECHNICAL SKILLS

BAND SAW, MITER SAW, TABLE SAW, CIRCULAR SAW, GRINDERS, DRILLS, SANDERS, PNEUMATIC TOOLS, HAND TOOLS. ABILITY TO DRIVE BOX TRUCKS, SCISSOR LIFT, FORKLIFT

FORKLIFT CERTIFIED, OSHA CERTIFIED

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 2 – Principals Info

2b. Resumes of Development Team

THIRD PARTIES

The following high-quality development team has been assembled to oversee the development of Burnet Place Apartments:

Third Parties for Burnet Place Apartments	
Development and Financing Consultant	True Casa Consulting, LLC Jennifer Hicks (512) 203-4417 jennifer@truecasa.net Texas HUB and WBE
Architect	Michael Hsu Office of Architecture Ken Johnson (512) 706-4303 johnson@hsuoffice.com
Engineer	Big Red Dog, a division of WGI Jill Tarleton (512) 669-5560 x. 1061 Jill.Tarleton@wginc.com
Owner's Representative	CPM Texas Joe Tracy (512) 298-1700 jtracy@cpmtx.com
General Contractor	Lott Brothers
Property Manager	Project Transitions, Inc. Madge Whistler (512) 454-8646 finance@projecttransitions.org
ESA Provider	Phase Engineering, Inc. Diana Hendrick (713) 476-9844 Diana@phaseengineering.com
Market Analyst	Affordable Housing Analysts Robert O. (Bob) Coe, II (281) 387-7552 Robertocoe2@gmail.com
Co-Developer and Mentor	Ardent Residential Art Carpenter art@ardent-residential.com
Supportive Service Provider	Project Transitions, Inc. Madge Whistler (512) 454-8646 finance@projecttransitions.org

The assembled team brings together vast experience in real estate development, affordable housing, local development and supportive housing.

TRUE CASA CONSULTING, LLC

Bio for Jennifer Hicks, Founder:

Jennifer Hicks has over 20 years of affordable housing development and finance experience first as Director of Finance for one of the State's premier nonprofit, affordable housing developers – Foundation Communities - for 16 years and then founding True Casa Consulting, LLC in 2017. While at Foundation Communities, Hicks led the development of 14 innovative and high-impact communities that provided 1,825 units of affordable housing. Hicks also helped create and implement the first supportive housing model in Austin and grew the model to 783 units before her departure. As founder of True Casa Consulting, LLC, Hicks has continued working with nonprofits to help structure and access capital for affordable housing projects in Texas providing consult to 930 units in active development and construction with additional units in the pipeline. Every affordable unit assisted by True Casa Consulting has involved the partnership of a nonprofit organization. Hicks' passion and expertise is centered around high-impact housing and enjoys the complexity and challenge these projects provide. She marries her development and finance skills with a deep understanding of the target population that helps inform both the physical and programmatic design of the project that best suits the target population.

Hicks is a graduate of Texas Tech University with a B.A. in Journalism and a graduate of the LBJ School of Public Affairs with a Master of Public Affairs.

Affordable Housing Development Experience

True Casa has the following experience in Affordable Housing Development:

- 1) Leading affordable housing site selection for new communities including analyzing sites for scoring and threshold requirements with Housing Tax Credit program.
- 2) Structuring purchase contracts to meet requirements of Housing Tax Credit program.
- 3) Reviewing purchase contracts and ensuring milestones are all achieved.
- 4) Coordinating professionals to conduct third party due diligence reports and reviewing all reports (i.e. Phase I ESA, appraisals, market studies, property condition assessments, civil engineering reports, and surveys.)
- 5) Managing the required follow-up for any third-party due diligence reports (i.e. Phase II ESA work.)
- 6) Coordinating RFQ's for architect and general contractor selection, including participating in selection committee.
- 7) Overseeing the financial structuring and development of 2,500 units of affordable housing.
- 8) Running project budgets and proformas for proposed affordable housing developments.
- 9) Managing the construction budget process including reviewing bids and participating in value engineering.
- 10) Leading the contract review and finalization for general contractor and architect and ensuring all federal requirements are properly referenced and adhered to, as well.
- 11) Participating in design review and input to ensure housing is designed with target population in mind.
- 12) Creating the organizational structure for new affordable housing developments including name registration and new entity creation with the Texas Secretary of State.

TRUE CASA CONSULTING, LLC

- 13) Ensuring that design and construction team is made aware of State and Federal housing construction requirements and that they are properly adhered to.
- 14) Overseeing compliance with Davis Bacon wage reporting and Federal labor standard laws.
- 15) Coordinating with development team on zoning and permit issues and timing, as needed.
- 16) Engaging with neighborhoods and community organizations on affordable housing education and specific development support.
- 17) Raising over \$300 million in grants and loans from public and private sources for the acquisition, rehabilitation and new construction of affordable housing.
- 18) Winning 9% low-income housing tax credits in Texas on 15 developments.
- 19) Preparing and processing 9% HTC applications including leading response to all deficiencies, underwriting and ensuring project meets all required reporting milestones.
- 20) Completing all reporting due to TDHCA on all HTC-funded projects – commitment, Carryover Allocation Agreement, 10% Test, construction monitoring reports, LURA origination, and Cost Certification.
- 21) Creating RFP for equity investors and lenders on affordable housing developments and analyzing responses for a final selection recommendation.
- 22) Negotiating the final LOIs from investors and lenders, as well as reviewing and negotiating the limited partnership agreement for tax credit projects.
- 23) Securing over \$14M in grant awards from the Federal Home Loan Bank Affordable Housing Program in 15 awards – application, underwriting, subsidy draw and initial compliance monitoring.
- 24) Securing gap funding from a variety of funding sources including: City of Austin Rental Housing Development Assistance Program, TDHCA Multifamily Direct Loan Program and Capital Magnet Fund.
- 25) Ensuring construction stays on timeline and meets any funder required deadlines (i.e. HTCPIS deadline.)
- 26) Leading the construction draw requests to construction lender and equity provider.
- 27) Ensuring all tax credit equity is drawn according to agreed upon milestones.
- 28) Coordinating with property management on lease-ups for HTC projects.
- 29) Structuring housing vouchers in new developments.
- 30) Designing supportive housing models based on site and project parameters.
- 31) Tracking project stabilization and leading the conversion to permanent mortgage.
- 32) Facilitating the refinancing of six different communities and preserving affordability.
- 33) Coordinating the Year 15 response on HTC financed communities.
- 34) Leading the closing on land acquisition and all project financing including coordinating the closing team and responding to due diligence calls from lender and investor.
- 35) Creating a compliance checklist that details all funder requirements for ongoing operations.

TRUE CASA CONSULTING

Project	New/Rehab	Units	Project Type	Financing	Yr Complete	Income Mix
Arbor Terrace, Austin, TX	Rehab	120	Supportive Housing	NSP, City of Austin, FHLB Atlanta	2012	90 units – 30% MFI 30 units – 50% MFI
Bluebonnet Studios, Austin, TX	New	107	Supportive Housing	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, TCAP, Enterprise Green Communities	2016	22 units – 30% MFI 21 units – 40% MFI 64 units – 50% MFI
Burnet Place Apartments, Austin, TX	New	61	Supportive Housing for Persons Living with HIV/AIDS	City of Austin RHDA, TDHCA MFDL, FHLB San Francisco, Private Fundraising	Under Development	13 units – 30% MFI 13 units – 40% MFI 35 units – 50% MFI
Capital Studios, Austin, TX	New	135	Supportive Housing	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco, Enterprise Green Communities,	2014	27 units – 30% MFI 27 units – 40% MFI 81 units – 50% MFI
Cardinal Point, Austin, TX	New	120	Family	9% LIHTC, City of Austin RHDA Program, FHLB AHP	2017	12 units – 30% MFI 60 units – 50% MFI 48 units – 60% MFI
The Commons at St. Anthony's, Amarillo, TX	Adaptive Reuse	124	Senior	9% LIHTC, State and Federal Historic Tax Credits	Under Development	13 units – 30% MFI 25 units – 50% MFI 86 units – 60% MFI
Eastern Oaks Apartments, Austin, TX	Rehab	30	Family	TDHCA MFDL and RHDA Program	2021	All units below 30% MFI
Espero Austin at Rutland, Austin, TX	New	171	Supportive Housing	4% HTC/PAB, City of Austin RHDA, TDHCA MFDL, FHLB Dallas	Under Construction	48 units – 30% MFI 38 units – 50% MFI 85 units – 60% MFI
Garden Terrace, Austin, TX	Rehab/New	123	Supportive Housing	City of Austin RHDA funding, FHLB AHP, TDHCA HOME, Section 8	2003, 2008, 2017	45 units – 30% MFI 75 units – 50% MFI 3 units – UR
Homestead Oaks, Austin, TX	New	140	Family	9% LIHTC, City of Austin RHDA Program, HUD 221(d)(4) loan, FHLB AHP	2015	14 units – 30% MFI 70 units – 50% MFI 42 units – 60% MFI 14 units – MKT
Manor Town II, Manor, TX	New	20	Seniors	TDHCA MFDL, FHLB AHP	Under Development	20 units at 30% MFI
Oaklawn Place, Dallas, TX	New	87	Seniors	9% LIHTC, City of Dallas, TIF, FHLB Dallas	Under Development	21 units – 30% MFI 34 units – 50% MFI 29 units – 60% MFI
The Jordan at Mueller, Austin, TX	New	132	Family	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco	2019	14 units – 30% MFI 66 units – 50% MFI 52 units – 60% MFI
Lakeline Station, Austin, TX	New	128	Family	9% LIHTC, City of Austin RHDA Program, Department of Justice Funds	2017	13 units – 30% MFI 64 units – 50% MFI 51 units – 60% MFI
Libertad Austin at Gardner, Austin, TX	New	198	Family	4% HTC/PAB, City of Austin RHDA, PBRA	In Development	30 units – 30% MFI 168 units – 60% MFI
Live Oak Trails, Austin, TX	New	58	Family Supportive Housing	9% LIHTC, City of Austin RHDA	2017	12 units – 30% MFI 12 units – 40% MFI 34 units – 50% MFI

TRUE CASA CONSULTING

M Station, Austin, TX	New	150	Family	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco	2011	15 units – 30% MFI 75 units – 50% MFI 45 units – 60% MFI 15 units – MKT
Roosevelt Gardens, Austin, TX	New	40	Supportive Housing for Persons Living with HIV/AIDS	City of Austin RHDA, TDHCA MFDL, FHLB San Francisco	Under Construction	14 units – 30% MFI 26 units – 50% MFI
Sierra Vista, Austin, TX	Rehab	238	Family	9% LIHTC, City of Austin RHDA Program, FHLB San Francisco	2012	24 units – 30% MFI 166 units – 50% MFI 48 units – 60% MFI
Spring Terrace, Austin, TX	Rehab	142	Supportive Housing	City of Austin RHDA, TDHCA HOME and HTF, FHLB Dallas	2006	14 units – 30% MFI 126 units – 50% MFI 2 units – UR
Skyline Terrace Austin, TX	Rehab	100	Supportive Housing	9% LIHTC, City of Austin RHDA, TDHCA HOME, FHLB San Francisco	2008	72 units – 30% MFI 28 units – 40% MFI
Talia Homes at Lamppost	New	16	Family	City of Austin RHDA	2021	
Thomas Square Apartments	Rehab	40	Seniors	9% LIHTC, HUD RAD for PRAC	Under Development	4 units – 30% MFI 16 units – 50% MFI 19 units – 60% MFI 1 staff unit
Waterloo Studios, Austin, TX	New	132	Supportive Housing	9% LIHTC and City of Austin RHDA Program	2020	26 units – 30% MFI 26 units – 40% MFI 80 units – 50% MFI
William Booth (Bell Crest), Houston, TX	Rehab	64	Elderly	9% LIHTC	Under Development	7 units – 30% MFI 26 units – 50% MFI 30 units – 60% MFI
TOTALS		2,646				
Supportive Housing		1,189				

Joe Tracy
Principal



Mr. Tracy brings his diverse experience as a business unit leader, construction project manager and developer's director of construction together with his characteristics of tenacity, strong work ethic, team building skills, and servant leadership style to provide the expert project leadership CPM has become known for.

PROFESSIONAL

Urban Land Institute
State Bar of Texas Construction Law Section

CIVIC

Austin Habitat for Humanity
Board of Directors, Chairman, Governance
Committee Chair, Real Estate Committee
Chair



EDUCATION

Purdue University
BS – Building Construction Management

EXPERIENCE

CPM Texas (2015-present)
Principal

Program / Project Management (major projects) including:

Leander Springs, 78-acre Mixed-Use Development	ND
The Linden, Condominiums (117 units)	\$110M
Goodwin, Market Rate Multi-Family (378 units)	\$90M
Project Transitions, Affordable Multi-Family (61 units)	\$12M
Texas Association of Counties – Office Core & Shell	\$25M
Indigo Ridge, 155-acre Mixed-Use Development	\$2B
Confidential Technology Client – Office Finish Out (300,000 sf)	\$80M
Brookfield Residential – Kissing Tree Amenities Phase 2	\$10M
CBA – KMFA Radio New Headquarters, Broadcasting Studio, Performance Venue	\$9M
RBJ-Blocks D&F, Mixed Use (30 units and commercial office)	\$10M
The Weaver, Market Rate Multi-Family (249 units)	\$35M
The Austonian, High Rise Edge Repairs	ND
Travis County North Campus-Mixed Use	\$46M
The Independent, Condominiums (370 units)	\$245M
Austin Ridge Bible Church / 2 Projects	\$61M
Foundation Communities, Affordable Multi-Family / 9 Projects (1,028 units)	ND
Eureka Holdings-Oak Creek Village, Affordable Multi-Family (173 units)	\$33M

Construction Claims Consultant / Expert Witness Services

Representing a broad range of clients in resolving construction related disputes

Hill & Wilkinson General Contractors (2010-2015)

Regional Vice President

Oversight of business development, preconstruction, field operations, staff development and related support services in Central Texas Office. Projects include:

Armed Services YMCA	\$12M
Texas State University STAR One Expansion	\$ 5M
Warm Springs Rehabilitation Hospital	\$12M
Jubilee Academy	\$12M
Southwest Medical Village	\$11M
St David's HealthCare-South Austin Medical Center / Multiple Small Projects	\$ 3M
Independent Bank Regional Headquarters	\$10M
Whole Foods Market – Oklahoma City	\$ 5M
502nd Air Base Wing, Joint Base Headquarters – Ft Sam Houston	\$10M

Endeavor Real Estate Group (2007-2010)

Director of Construction

Manage Design & Construction process for new developments as well as support teams evaluating development and acquisition opportunities. Projects include:

IBC Bank Plaza – Planning & Preconstruction Services, 195ksf/13 stories	\$60M
RREEF's Domain – Strategic planning and implementation for redevelopment of existing manufacturing/industrial campus to new Residential, Office and Retail / Mixed-Use Districts	\$1.5B
Gateway Office Building Tenant Finishout	\$ 8M
Electronic Arts/Bioware Tenant Finishout	\$ 2M
University Oaks Shops 4&5	\$ 1M
Southpark Office Center Offsite Parking & Drainage	\$ 1M

The Beck Group (1993-2007)

Project Manager

Manage construction teams in building projects both large and small as a Design-Builder or Construction

Manager at Risk. Projects include:

Concordia University Campus Relocation	\$ 15M
Domain Phase I	\$110M
Baylor University North Village Living & Learning	\$ 30M
Cedar Creek Intermediate School	\$ 9M
IBM Tivoli Campus	\$ 40M
AT&T On-Call – South & Central Texas / Hundreds of projects over 3.5 years	\$ 35M
USAA Bank Services Building I & II	\$ 70M

Brian Wheelis
Assistant Project Manager



Mr. Wheelis brings his diverse experience as a commercial construction project manager and his adept ability to assess project needs, generate options, and implement solutions to produce successful outcomes.

EDUCATION

Texas A&M University
BS – Construction Science

EXPERIENCE

CPM Texas (2019-present)
Assistant Project Manager

Program / Project Management (major projects) including:

Mason County Courthouse Restoration	\$20M
CBA – KMFA Radio New Headquarters, Broadcasting Studio, Performance Venue	\$9M
RBJ-Blocks D&F - Mixed Use (30 units and commercial)	\$10M
Confidential Technology Client – Office Finish Out (300,000 sf)	\$80M
RBJ-Blocks A1&A2, Hatchery Phase III – Multi-Family, Office, Retail, Garage	TBD
Austin Habitat for Humanity, 4 th & Onion Street (45 units)	\$15M
Project Transitions (61 units)	\$12M
Velocity – Phase 2 Public Improvements (49 acres)	\$8M
Austin Cancer Centers – Infusion Center	\$2M

Elevated Imagery, LLC (2018-2019)
Co - Owner

UAS based LiDAR, FLIR and Photogrammetry Company that specialized in geospatial mapping for energy providers, surveyors and engineers.

SpawGlass General Contractor (2012-2018)
Project Manager

Program / Project Management (major projects) including:

The University of Texas at Austin Tennis Center Replacement Facility	\$13M
HEB West Killeen Market	ND
Bethany United Methodist Church – New Worship Center	\$10M
Mother Neff State Park Redevelopment and Flood Damage Repair	\$10M
Lamar State College – Nursing Building and Classrooms	\$7.6M
Riverfront Boardwalk and Pavilion – City of Orange, Texas	\$6M

Michael Hsu Office of Architecture was formed in 2005 with the goal of producing locally-engaged, design driven architecture and interiors in Austin. MHOA endeavors to create livable, neighborhood-oriented urban spaces. Our work includes diverse projects ranging from mixed-use developments to original commercial interiors and residences.

MHOA advocates a simple, edited design palette, using available materials and techniques to create unexpected results. MHOA believes in the innate beauty of unadorned natural materials, carefully chosen, composed and crafted.

MHOA is concerned with producing work that is functional, engaging and honest. We believe in the active collaboration between designer, client, consultant, and craftsman and embrace the challenges of site and budget to inspire highly creative, cost-effective solutions. Our numerous adaptive re-use projects demonstrate our passion for imaginative and sustainable solutions from modest resources.

Michael Hsu, AIA, IIDA is the founder and principal of Michael Hsu Office of Architecture. Following graduation from the University of Texas at Austin School of Architecture, Hsu worked at OMA in the Netherlands and in Dallas before returning to Austin where he has practiced since 1998. Hsu is currently President of the local AIA chapter.

In 2015, three members of his team were promoted to partner : Jay Colombo, Maija Kreishman and Micah Land. MHOA has completed projects throughout the state of Texas as well as nationally in cities such as Los Angeles, Washington D.C., Chicago, New York and Denver.

MHOA has received design awards from AIA Los Angeles, Texas Society of Architects, IIDA Texas/Oklahoma, the Heritage Society of Austin and AIA Austin including Firm of the Year in 2016.





LOTT BROTHERS
CONSTRUCTION COMPANY

HEALTHCARE EXPERIENCE

- Ascension Dell Children's Hospital MOB** Austin, TX 161,600 SF
- Ascension Seton Medical Center Hays** Kyle, TX 341,000 SF
- Ascension Seton Medical Center Williamson** Round Rock, TX 365,000 SF
- Austin Oaks Behavioral Hospital** Austin, TX 50,000 SF
- Central Texas Rehab Hospital** Austin, TX 59,250 SF
- Coleman County Medical Center** Coleman, TX 24,000 SF
- Cornerstone Long Term Acute Care** Round Rock, TX 60,000 SF
- Edinburg Children's Hospital** Edinburg, TX 108,000 SF
- Everest Rehabilitation Hospitals** 3 TX Locations 120,000 SF
- Fort Duncan Medical Center** Eagle Pass, TX 212,000 SF
- Gonzales Wellness Center** Gonzales, TX 50,000 SF
- Hamilton General Hospital** Hamilton, TX 35,000 SF
- Hualapai Mountain Medical Center** Kingman, AZ 180,000 SF
- Iraan General Hospital** Iraan, TX 33,000 SF
- Lake Travis Rehab Hospital** Lakeway, TX 50,000 SF
- Northwest Texas Hospital** Amarillo, TX 110,000 SF
- Permian Regional Medical Center** Andrews, TX 104,000 SF
- Permian Wellness Center** Andrews, TX 76,416 SF
- Red River Behavioral Hospital** Wichita Falls, TX 31,000 SF
- Renaissance Women's Center** Austin, TX 75,000 SF
- Round Rock Medical Office Building** Round Rock, TX 45,666 SF
- Round Rock Rehab Hospital** Round Rock, TX 48,000 SF
- Shannon Medical Center MOB** San Angelo, TX 86,000 SF
- South Texas Behavioral Hospital** Edinburg, TX 76,000 SF
- St. David's Medical Center**, Austin, TX 80,000 SF
- Sundance Memory Care** Cedar Park, TX 27,500 SF
- Sweeny Hospital** Sweeny, TX 119,400 SF



CHARACTER | LEADERSHIP | EXCELLENCE | ATTITUDE | RESPONSIBILITY





LOTT BROTHERS
CONSTRUCTION COMPANY

RESIDENTIAL EXPERIENCE

- Capitol Quarters Austin, TX 45,000 SF
- Dessau Mixed Use Pflugerville, TX 75,600 SF
- Dominion Student Condominiums Austin, TX 30 Units
- Greenway Lofts Condominiums Austin, TX 40,000 SF
- Hearthside Inn Austin, TX 70,000 SF
- Hearthside Inn Colorado Springs, CO 70,000 SF
- Joseph's Corner Student Condominiums Austin, TX 6,000 SF
- Landmark Lofts Condominiums New Braunfels, TX 225,000 SF
- Longview Student Condominiums Austin, TX 12 Units
- Pearl at 22-1/2 Student Condominiums Austin, TX 15 Units
- Pike Fraternity House Austin, TX 27,093 SF
- Silver Leaf Resort 48 Canyon Lake, TX 16,000 SF
- Spring Ranch Student Villas San Marcos, TX 50,631 SF
- Springs at Cottonwood Creek Waco, TX 323,978 SF
- Springs at Country Club Lake Charles, LA 310,000 SF
- Springs at Summer Park Rosenberg, TX 309,319 SF
- Springs at Sunfield Buda, TX 285,095 SF
- Sundance Towne Lake Cypress, TX 27,000 SF
- Texas School for the Blind Dormitories Austin, TX 24,000 SF
- Windridge Student Condominiums Austin, TX 30 Units



CHARACTER | LEADERSHIP | EXCELLENCE | ATTITUDE | RESPONSIBILITY



ABOUT US

BIG RED DOG (BRD) is a Texas-based engineering firm specializing in civil, MEP, structural, traffic, and transportation engineering for real estate, infrastructure, and natural resource development on behalf of public and private clients.

As of January 1, 2019, BRD is a division of WGI (Wantman Group, Inc.), a forward-thinking, national design firm in the public and private infrastructure markets.

We are now integrated into a team of nearly 600 professionals in 18 offices across Florida, Texas, Michigan, Illinois, Indiana, and North Carolina. Together, we have our sights set on affirming WGI's national trademark: Tomorrow's Technology Today, investing in the cutting-edge efficiencies and solutions that forward-thinking clients demand.

OUR SERVICES



**CIVIL & SITE
ENGINEERING**



**MEP
ENGINEERING**



**STRUCTURAL
ENGINEERING**



**TRANSPORTATION
ENGINEERING**

TX LOCATIONS

AUSTIN

2021 East 5th Street
Suite 200
Austin, TX 78702
512.669.5560

DALLAS

8144 Walnut Hill Lane
Suite 903
Dallas, TX 75231
214.307.4767

HOUSTON

2500 Summer Street
Suite 2100
Houston, TX 77007
832.730.1901

SAN ANTONIO

5710 Hausman Road
Suite 115
San Antonio, TX 78249
210.860.9224

SUGAR LAND

2245 Texas Drive
Suite 240
Sugar Land, Texas 77479
832.431.4560

OUR EXPERTS

TOTAL FIRM
100

LICENSED P.E.'S
36

ENGINEERS IN TRAINING
20

CAD/BIMDESIGNERS
20

OUR AWARDS



AFFORDABLE HOUSING & TAX CREDIT DEVELOPMENTS

Project	Location	Units	Developer	Architect	Year
The Legacy	Austin, TX	41	Mary Lee Foundation	Haddon+Cowan Architects	2013
Capital Studios	Austin, TX	135	Foundation Communities	Dick Clark + Associates	2016
The Standard at Leander Station	Leander, TX	225	Hughes Capital Management	B&A Architects	2016
Bluebonnet Studios	Austin, TX	107	Foundation Communities	Forge Craft Architecture + Design	2017
Cliffs at Crownridge	San Antonio, TX	292	NE Development	Cross Architects	2017
The Reserve at Springdale	Austin, TX	292	Austin Affordable Housing Corp. / Ryan Companies	Kelly Grossman Architects	2017
The Chicon	Austin, TX	28	Chestnut Neighborhood Revitalization Corp.	Hatch + Ulland Owen Architects	2018
RBJ Center	Austin	500	DMA Development / Austin Geriatric Center	Nelsen Partners	Construction
Cevallos & South Flores	San Antonio, TX	297	Athena Domain	Investwell Architects	Design / Permitting
Commons at Manor Village	Manor, TX	172	LDG Development	Studio A Architecture	Design / Permitting
Manchaca Family Apartments	Austin, TX	240	LDG Development	Studio A Architecture	Design / Permitting
St. John's Seminary Mixed Use	San Antonio, TX	228	210 Development Group	B&A Architects	Design / Permitting



QUICK FACTS

PROGRAM:

Multifamily | Garden-Style

DEVELOPER:

Hughes Capital Management

ARCHITECT:

B&A Architects

PROJECT SIZE:

±9.67 Acres

225 Units

SERVICES PROVIDED:

Civil Engineering Design

Regulatory Permitting

Construction Phase Services



PROJECT SUMMARY

The Standard at Leander Station is a 225-unit multifamily project located in Leander, Texas.

The community is situated just south of Austin Community College's new campus in the city's 2,300-acre Transit Oriented Development (TOD) area which surrounds the Capital Metro MetroRail (Red Line) station.

The project, designed by B&A

Architects, contains six 3-story residential buildings, a clubhouse, enclosed garages, pool, and amenity spaces.

BIG RED DOG provided civil engineering and site development permitting services for The Standard at Leander Station. The project was completed in 2016.

QUICK FACTS

PROGRAM:

Mixed Use (Affordable Senior Housing, Market Rate Multifamily, Commercial)

DEVELOPER:

Cesar Chavez Lakeview Village, LLC

ARCHITECTS:

Nelsen Partners
Davies Collaborative
Sixthriver Architects

PROJECT SIZE:

±17 Acres
8 Buildings
1.4M GSF

SERVICES PROVIDED:

Project Due Diligence, Zoning Support
Civil Engineering Design
MEP Engineering Design
Structural Engineering Design
Regulatory Permitting
Construction Administration



DMA Development



Nelsen Partners

PROJECT SUMMARY

The RBJ Center project is the master-planned redevelopment of a 17-acre site along the northern shore of Lady Bird Lake in Austin, Texas. The project includes the renovation and construction of 500-units of affordable housing for seniors and people with disabilities, 500-units of market-rate apartments, 44,000-square-feet of office and retail space, and structured parking.

In total, the project includes over 1.4-million gross square feet of building space across 8 buildings.

The project required extensive coordination with community stakeholders to ensure that the surrounding neighborhood and the community at large will benefit from this transformative project. The project is currently under construction.

QUICK FACTS

PROGRAM:

Affordable Housing

DEVELOPER:

Foundation Communities

ARCHITECT:

Dick Clark & Associates

CONTRACTOR:

SpawGlass

PROJECT SIZE:

±0.6 Acres

135 Units

SERVICES PROVIDED:

Project Due Diligence

Civil Engineering Design

Site Development Permitting

Construction Administration



Dick Clark + Associates

PROJECT SUMMARY

Capital Studios, located in downtown Austin at 11th Street and Trinity Street, is a tax credit financed project by Foundation Communities.

Capital Studios was the first new affordable housing project built in downtown Austin in 45 years. It provides 135 efficiency apartments for \$400 to \$700 a month (bills included).

The project was designed for residents living a car-free lifestyle - particularly for those who work downtown. Capital Studios was designed to exceed LEED Platinum standards.

BIG RED DOG completed the civil engineering design and permitting for this project, which included a license agreement and extensive streetscape design.

QUICK FACTS

PROGRAM:

Affordable Housing

DEVELOPER:

The Mary Lee Foundation

ARCHITECT:

Haddon + Cowan Architects

PROJECT SIZE:41 Units
±0.5 Acres
25,000 SF**SERVICES PROVIDED:**Project Due Diligence
Civil Engineering Design
Site Development Permitting
Construction Administration

PROJECT SUMMARY

The Legacy, at 1340 Lamar Square Drive, in Austin, Texas is a project that provides 41 affordable apartment units to help serve the Mary Lee Foundation's mission in helping children and adults with special needs and mental illness. The building provides affordable, accessible, and sustainable apartments with panoramic views of downtown and the UT Tower.

The Legacy proudly achieved a 4 star energy rating and meets S.M.A.R.T. (safe, mixed-income, accessible, reasonably-priced, and transit oriented) Housing standards.

BIG RED DOG provided civil engineering and site development permitting services for the project, which was completed in 2013.

QUICK FACTS

PROGRAM:

Affordable Housing

DEVELOPER:

Foundation Communities

ARCHITECTS:Forge Craft Architecture + Design
Dick Clark & Associates**CONTRACTOR:**

SpawGlass

PROJECT SIZE:±0.7 Acres
107 Units**SERVICES PROVIDED:**Project Due Diligence
Civil Engineering Design
Site Development Permitting
License Agreement
Construction Administration

PROJECT SUMMARY

Bluebonnet Studios is a vibrant and modern residence that provides housing for 107 single adults, including low-wage workers, formerly homeless individuals, veterans, seniors and individuals with disabilities.

BIG RED DOG completed the civil engineering design and site development permitting for this project, which is located on vibrant South Lamar Boulevard in

south Austin, Texas.

Forge Craft Architecture + Design was responsible for incorporating some of the most progressive design elements into the project, which Foundation Communities hopes will change the way people think about affordable housing projects. Bluebonnet Studios opened in 2017.

QUICK FACTS

PROGRAM:

Affordable Housing

DEVELOPER:

Ryan Companies in partnership with Austin Affordable Housing Corporation

ARCHITECT:

Kelly Grossman Architects

CONTRACTOR:

Ryan Companies

PROJECT SIZE:

292 Units

±21 Acres

SERVICES PROVIDED:

Project Due Diligence
Civil Engineering Design
Site Development Permitting
Offsite Utility Design
Construction Administration



PROJECT SUMMARY

The Reserve at Springdale is an affordable housing project located near the Mueller Airport redevelopment in Austin, Texas. It was developed by the Austin Affordable Housing Corporation (AAHC), a nonprofit housing subsidiary of the Housing Authority of the City of Austin.

The project includes 292 units (some of which are live/work spaces), an onsite café,

community playground, swimming pool, recreation room, and fitness facilities.

BIG RED DOG provided civil engineering design and site development permitting for the project, which opened in 2017.



BAILEY HARRINGTON, P.E.

CIVIL MARKET LEADER

Mr. Harrington works with clients and co-consultants as the Civil Market Leader on projects in Austin and the surrounding area. He is a graduate of the United States Military Academy, and is a licensed professional engineer in the State of Texas.

His past efforts include leading engineering and construction teams for multiple projects types including commercial, residential, and hospitality projects across the state of Texas.

CREDENTIALS

PROFESSIONAL ACCREDITATION

Registered Professional Engineer
State of Texas #114304

EDUCATION

U.S. Military Academy
West Point, New York
B.S. Civil Engineering

PROFESSIONAL ORGANIZATIONS

Urban Land Institute (ULI)
Real Estate Council of Austin
(RECA)
Leadership Austin EMERGE
Class of 2015

REFERENCES

Mr. Nick Whittaker
Greystar Real Estate Partners
512.270.3139

Mr. Chris Krajcer
Lake | Flato Architects
512.373.3715

Mr. Roger Plourde
Turnbridge Equities
212.651.7272

NOTABLE PROJECTS

MULTIFAMILY & MIXED USE

- Music Lane Mixed Use
Austin, Texas
- Lamar Union
Austin, Texas
- Corazon
Austin, Texas
- Burnet Marketplace
Austin, Texas
- Lakeshore Pearl
Austin, Texas
- Capital Studios
Austin, Texas

HOSPITALITY

- Hotel Van Zandt
Austin, Texas
- South Congress Hotel
Austin, Texas
- Magdalena Hotel
Austin, Texas

SENIOR LIVING

- Lake Travis Independent Living
Lakeway, Texas
- The Enclave at Round Rock
Round Rock, Texas
- The Enclave at Cedar Park
Cedar Park, Texas
- Overture Lakeline
Austin, Texas

SINGLE FAMILY

- Magnolia Creek
Leander, Texas

- Eastwood at Riverside
Austin, Texas
- Heritage Oaks Subdivision
Austin, Texas

K-12

- Girls School of Austin
Austin, Texas
- IDEA Public School Vargas
Austin, Texas
- Trinity Episcopal School Sports
Field
Austin, Texas

INSTITUTIONAL & HEALTHCARE

- Scott & White Hospital
Various Projects Statewide
- Manor Medical Office Building
Manor, Texas

OFFICE

- The Republic
Austin, Texas
- 2021 E. 5th Street
Austin, Texas
- Texas Public Policy Foundation
Austin, Texas

SMALL COMMERCIAL

- Dunkin Donuts
Kyle, Texas
- In-N-Out Burger
Various Projects Statewide
- CVS Pharmacy
Various Projects Statewide

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JILL TARLETON, P.E.

CIVIL PROJECT ENGINEER

Ms. Tarleton is a civil project engineer in our Austin, Texas office. Jill graduated from California State University Long Beach with a degree in Civil Engineering. She is a licensed professional engineer in the State of Texas and the State of California. Her professional experience includes commercial, residential, industrial, and mixed-use projects.

CREDENTIALS

PROFESSIONAL ACCREDITATION
Registered Professional Engineer
State of Texas #130413
State of California #C87424

EDUCATION
California State University Long
Beach
Long Beach, CA
B.S. Civil Engineering

PROFESSIONAL ORGANIZATIONS
Urban Land Institute (ULI)

REFERENCES

Megan Shannon
Momark Development
512-233-2331

Robert Booth
HLR Architects
832-379-2983

Josh Lowe
Millcreek Residential
512-784-2637

NOTABLE PROJECTS

MULTIFAMILY & MIXED-USE

- Modera Domain
Austin, Texas
- 44 East
Austin, Texas
- RBJ Center
Austin, Texas
- Columbia Square
Los Angeles, California
- Academy Square
Los Angeles, California
- Edin Park
Los Angeles, California

OFFICE

- The Republic
Austin, Texas

HOSPITALITY

- Origin Hotel
Austin, Texas
- Red Bluff Hotel
Austin, Texas

SINGLE FAMILY

- Cypress Village
Irvine, California

INDUSTRIAL

- Giti Tire
Richburg, South Carolina

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JOEL BLOK, P.E.

CONSTRUCTION SERVICES TEAM LEADER

Mr. Blok has worked in the design and construction administration phases of a wide array of projects totaling more than \$750M in value, and has design experience in reinforced concrete, post-tensioned concrete, structural steel, masonry, and timber structural systems. In addition, he has developed a deep understanding of the construction process and the skills & relationships so critical in the delivery of successful projects.

CREDENTIALS

PROFESSIONAL ACCREDITATION
Registered Professional Engineer
State of Texas #123800

EDUCATION
The University of Texas at Austin
Austin, Texas
M.S. Structural Engineering

Hope College
Holland, Michigan
B.S. Civil Engineering

PROFESSIONAL ORGANIZATIONS
Structural Engineers Association of
Texas (SEAoT)
American Institute of Steel
Construction
Urban Land Institute

REFERENCES
Ms. Megan Shannon
Momark Development
512.391.1789

Mr. Howell Beaver
Oden Hughes
512.813.7105

Mr. Kevin Tiseo, P.E.
Turnbridge Equities
212.651.7272

NOTABLE PROJECTS

MULTIFAMILY/VERTICAL MIXED USE

- RBJ Center
Austin, Texas
- Seven Rio Residential Tower
Austin, Texas
- Tyndall at Robertson Hill
Austin, Texas

LARGE COMMERCIAL/MIXED USE

- Music Lane Mixed Use
Austin, Texas
- 801 E. 6th Street Office
Austin, Texas
- 2010 South Lamar Office
Austin, Texas
- Goodwill Headquarters Expansion
Austin, Texas

AVIATION & TRANSIT

- Austin-Bergstrom International
Airport Terminal East Infill
Austin, Texas
- Austin-Bergstrom International
Airport Terminal East Concourse
Expansion
Austin, Texas

SENIOR LIVING

- Lake Travis Independent Living
Lakeway, Texas
- The Enclave at Round Rock
Round Rock, Texas
- The Enclave at Cedar Park
Cedar Park, Texas
- Overture Arboretum
Austin, Texas

CIVIC

- Midland Civic Center
Midland, Texas

REHAB & ADAPTIVE RE-USE

- Hutto Cotton Gin Building Adaptive
Re-Use
Hutto, Texas

HIGHER EDUCATION

- Baylor University East Village
Waco, Texas

K-12

- San Juan Diego Catholic High
School
Austin, Texas

INSTITUTIONAL & HEALTHCARE

- Dominican Sisters of Mary Mother
of the Eucharist Convent
Georgetown, Texas

CIVIC

- Houston Arboretum and Nature
Center
Houston, Texas

HOSPITALITY

- Arrive Hotel
Austin, Texas
- Hotel Magdalena
Austin, Texas

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Ardent Residential was founded in 2005 by Art Carpenter and Brett Denton to pursue mixed-use, residential and resort development. Since its inception, Ardent has commenced 17 projects including:

- Nexus East, Austin, Texas: 352 Multifamily Residences construction commenced June 2019 | DDelta provided Equity
- Palo Verde, Austin, Texas: 296 Multifamily Residences construction completion July 2019 | Phoenix Capital provided Equity
- Groves South Lamar, Austin, Texas: 307 Multifamily Residences completed February 2018 | Stonelake Capital provided Equity
- Farmhouse, Austin, Texas: 235 Multifamily Residences completed September 2017 | Phoenix Capital provided Equity
- Ocotillo, Austin, Texas: 308 Multifamily Residences completed May 2017 | BlackRock / CALSTERS provided Equity
- 7East, Austin Texas: 177 Multifamily Residences + 9 Commercial Units completed 2015 | Stonelake Capital provided Equity
- Burnet Flats, Austin Texas: 179 Multifamily Residences + 2,800 SF of Commercial Space completed 2014 | BlackRock / CALSTERS provided Equity
- Gibson Flats, Austin Texas: 202 Multifamily Residences + 3,000 SF Restaurant completed 2014 | BlackRock / CALSTERS provided Equity
- 5350 Burnet Road, Austin Texas: 175 Multifamily Residences + 9,100 SF of Retail completed 2010 | Phoenix Capital provided Equity
- Post South Lamar, Austin Texas: 298 Multifamily Residences + 10,000 SF of Retail completed 2013 | Post Properties provided Equity
- Post West Austin, Austin Texas: 329 Multifamily Residences completed 2009 | Post Properties provided Equity
- Four Seasons Residences, Austin: 148 Condominium units + 10,000 SF of Retail completed in 2010 | Post Properties provided Equity
- Four Seasons Private Residences, Houston: 49 Condominium units completed in 2006 | Overland Capital provided Equity
- Little Dix Bay, Virgin Gorda BVI: Phased Renovation & Expansion including the construction and sale of 18 Vacation Villas (2002-2006) | Maritz Wolff provided Equity
- Four Seasons Resort, Nevis BWI: Resort Expansion (2004-2005) | Maritz Wolff provided Equity
- Villas at Four Seasons, Nevis: Master Planning for 15 Vacation Villas (2007-2008) | Maritz Wolff provided Equity
- Hotel Carlyle, NY, NY: Design & Construction of a new Spa & Fitness Facility | Maritz Wolff provided Equity
- Four Seasons Resort Cayo Largo, Puerto Rico: Resort & Vacation Villa Master Planning (2009-2011) | DLJ Real Estate Partners provided Equity

Ardent has three projects currently being designed and / or permitted:

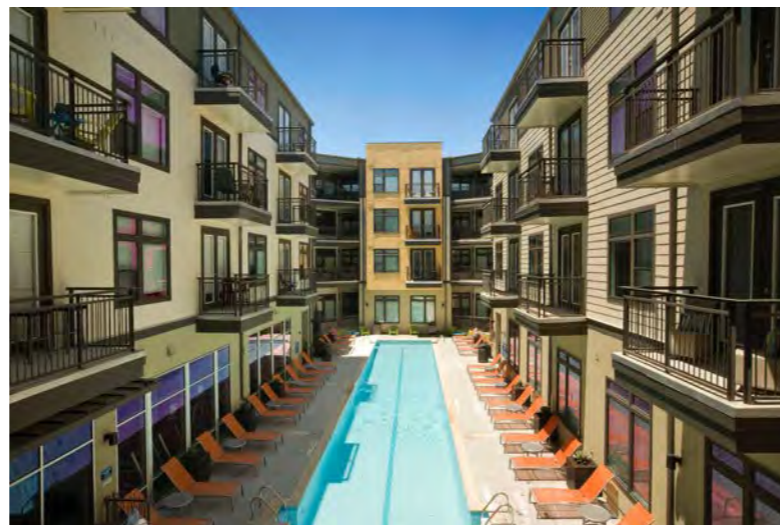
- Yaupon, Austin, Texas: 300 Multifamily Residences construction commencing July 2019
- The Bouldin, Austin, Texas: 309 Multifamily Residences + 3,000 SF of Retail construction commencing 4Q 2019
- 2711 Anderson, Austin, Texas: 322 Multifamily Residences + 4,000 SF of Commercial construction commencing 1Q 2020

- **Arthur G. Carpenter, Principal and Co-Owner**
With Ardent from inception, 35 years in Real Estate industry
- **Brett M. Denton, Principal and Co-Owner**
With Ardent from inception, 31 years in Real Estate industry
- **Greg M. Smyrl, Principal and Director of Operations**
Joined Ardent in 2006, 30 years in Real Estate industry
- Carpenter, Denton and Smyrl worked together at JPI Development in Austin.
- Carpenter and Denton have developed over 16,000 multifamily units in Austin, Houston, Phoenix, Denver and Seattle.
- Smyrl has provided asset management services for 17,500 units located in California, Colorado, Georgia, Florida, Minnesota, North Carolina, Texas and Washington.
- In addition to multifamily, condominium and mixed-use developments, Ardent Principals have multiple years of experience in hotel, resort, retail, office, mobile home park and raw land asset types.

Before starting Ardent, Art Carpenter was the Principal of A.G. Carpenter, L.P. (2003 to 2005), Vice President of Development for Maritz, Wolff & Co. (2000-2003), Southwest Regional Partner for JPI (1993-2000) and Project Manager for The Zeckendorf Company in New York (1987-1992). While at Zeckendorf, Art was responsible for coordinating the development and sale of over 2,000 condominium residences in New York City. While at JPI, Art was responsible for the development of over 7,000 multifamily units. From 1983-1987, Carpenter was a commercial lender with Chemical Bank in New York. He is a 1983 graduate of Princeton University.

Before forming Ardent Residential with Art, Brett Denton was the Regional Vice President of Development for Gables Residential in Austin and Houston (2003 to 2005). Prior to Gables, Brett was Senior Vice President and Managing Regional Partner for JPI Development in Denver, Colorado and Vice President and Area Managing Partner for JPI in Austin and Houston (1997 to 2003). Brett has been involved in the development of nearly 7,500 multifamily units. Prior to focusing on the multifamily industry, Brett worked with Trammell Crow Company (D.C.), Simmons Vedder & Company (Austin) and Continental Homes (Austin). Brett is a 1987 graduate of Texas A&M University and a 1992 Graduate of the University of Chicago Graduate School of Business.

Prior to joining Ardent Residential as a Principal in October of 2006, Greg Smyrl was the Senior Vice President and Area Partner for JPI in Austin, focusing on acquisitions (2006). Prior to acquisitions, Greg was Senior Vice President of Asset Management for the West Coast and Central Divisions from 2003 to 2005 and served as Asset Manager from 1996 to 2002 overseeing 16,500 units in total. In all, Greg spent 14 years at JPI (1992-2006). Prior to JPI, Greg worked at Hall Financial Group (1989-1992). Greg graduated from Baylor University in 1989.



**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 2 – Principals Info

**2c. Resumes of Property
Management Team**



PROPERTY MANAGEMENT TEAM

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

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

Burnet Place Apartments will be served with the same property manager and maintenance as the other two properties in the portfolio; however, an additional social worker (total of three persons) and 24-hour front desk coverage will be added to the supportive service staff to best serve the increase in residents.

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

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

Please find attached the 2020-21 compliance audit performed by the City of Austin on PT's Housing Programs which you find meet or exceed standards.

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

- Jessica Schrillo – Housing Program Manager
- AJ Smallwood - Facilities Manager
- Todd Logan – Grants and Special Projects

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

Jessica Schrillo

(She/They)

6713 Panda Royle Dr.
Del Valle, TX 78617
(512) 470-1949
rschrillo@gmail.com

EDUCATION

**Midwestern State University, Wichita Falls, Texas—
Bachelor of Science in Psychology with a minor in Biology**

Graduated December 2018

Relevant Coursework

Human Behavior, Substance use, Health Psychology

EXPERIENCE

Project Transitions, Austin, Texas—Program Manager,

May 2019 - Present

Managed 3 properties with 27 households in the HOPWA TSH program, Performed Maintenance requests, Developed Policies and Procedure, Built and managed a team of 5 staff to operate the program.

Vivent Health, Austin, Texas— Case Manager,

May 2019 - May 2021

Provide homeless prevention and rehousing services to a caseload of 60 clients while providing statistical data to the Department of Housing and Urban Development. Working with a variety of different people to overcome barriers that prevent stable housing.

San Gabriel Crisis Respite, Georgetown, Texas—Residential Specialist,

June 2017 - August 2018

Provide healthy meals and administer medications to up to 12 clients with a variety of presenting mental illnesses. Foster a safe environment for clients, Assist psychologists in treatment plans for clients.

SEEK Camp, Pottsboro, Texas— Counselor

May 2016-Present

Assisting up to 8 Adults with mental disabilities with their daily needs while ensuring they had a fun time at camp.

SKILLS

CPR/BLS,

Customer Service,

IBM-SPSS,

Certifications

Trauma Informed Care,

Transforming Health,

Mental Health First Aid,

AWARDS

Boy Scouts of America

(2007–Present)

Life Scout rank, Order of the Arrow

Wesley Foundation

(2014–present)

AJ SMALLWOOD

AUSTIN, TX 512.748.7596 asmallworld2243@gmail.com

PROFESSIONAL EXPERIENCE

INDEPENDENT CONTRACTOR/SELF EMPLOYED

HANDY MA'AM, AUSTIN, TX

02.2022 - Current

- Create and advertise brand to the greater Austin area, utilizing digital and physical spaces to reach customers
- Effectively maintained relationships using customer service, providing consistent outcomes, etc with management companies, as well as individual homeowners to attract repeat business
- Perform varying types repairs, replacements, installations, assemblies, using personal knowledge and in-depth research
- Complete walkthrough of properties alone as well as with property owners in order to produce accurate and affordable quotes for cost of repair
- Prepare best course of action and required materials ahead of time to utilize time effectively in order to complete multiple work orders a day
- Maintain clean, safe, and organized work space while on site
- Utilize free time researching methods of repairs/replacements, troubleshooting tips, common household failures, etc in order to gain knowledge from other professionals

SENIOR, ASSEMBLY TECHNICIAN II

AYRO INC, AUSTIN, TX

10.2017 - 02.2022

- AYRO designs and manufactures compact, purpose-built, automotive-grade electric vehicles used as part of a fleet on university and corporate campuses, for commercial and urban delivery, etc.
- Responsible to conduct end of line inspection/sign off on vehicles prior to market
- Use software to program vehicle speed
- Created and update quality/final inspection checklists
- Perform quality and final inspection prior to sale
- Review checklists to ensure all tasks were completed at each station in proper order
- National Travel to perform repairs on customer vehicles post-sale at the customer site
- Conduct brake installations/repair, alignments, standard/custom exterior, and interior painting
- Repair and troubleshoot electrical and mechanical issues-faulty wiring, cracks in plastic, stripped lug nuts, drive-shafts, etc
- Operate forklift in a warehouse setting for the organization of products and inventory
- Continually conducted research and experimentation to improve assembly processes and the quality of vehicles

INDEPENDENT CONTRACTOR / ASSEMBLY & INSTALLATION TECHNICIAN

HANRAHAN ASSEMBLY, AUSTIN, TX

4.2017 - 10.2017

- Maintain partnership with 3rd party retailers providing efficient and effective customer service
- Communicate build plan with the client and maintain a relationship for the duration of project
- In-state and local travel to customer locations to perform assembly of residential and commercial furniture, including, but not limited to; desks, dressers, modular closets, tables, bookshelves, etc.
- Out-of-State travel for new build IKEA stores and interior retail set-up (furniture build per blueprints and layouts)
- Ability to using hand and power tools
- Specialty: custom installations. Mounting televisions, floating entertainment systems, various shelving and multi-units

AJ SMALLWOOD

AUSTIN, TX 512.748.7596 asmallworld2243@gmail.com

PROJECT MANAGER (2015 - 2017)

2012 - 2.2017

DRIVELINE RETAIL INC., COPPELL, TX

- Responsible for overseeing the interior construction for 50 Dollar General new builds across the Mid-Western and Eastern United States to company specifications and within the contracted deadline
- Supervision of the installation crew (12-20) for coordinations of the interior layout of aisles, registers and departments to speculations and blueprints
- Manage project hours and maintain labor, material and equipment/tool budget
- Review PDF of CAD Blueprints for stores, review preliminary issues with cable, internet, lighting, electric install, structural construction and/or property excavation
- Visit pre-existing stores to draw out the aisle layout, take measurements, transfer to graph-paper and create accurate depictions of store-product layouts for future store remodels and new constructions
- Keep auditing notes of stores adherence to company standards and brand compliance
- Oversaw stocking crew and Store Manager for store openings
- Plan-o-gram and blueprint adherence

HEAVY RESET SPECIALIST / HEAVY PROJECT MERCHANDISER (2012 - 2015)

DRIVELINE RETAIL INC., COPPELL, TX

- Assist the Project Manager
- Personally performing and working with the team to complete the construction of new build interior store layouts based off plan-o-gram, store blueprints and verbal instructions
- Personally performing and working with the team to complete the instore-resets of product in conjunction based off plan-o-gram, store blueprints and verbal instructions
- Resolving preliminary floor-set issues

ASSISTANT MANAGER

LITTLE CAESARS, ASHLAND, KY

9.2010 - 2.2012

- Accountable for customer satisfaction for a 100 seat dine-in and carry out location
- Assist the GM in the recruiting, hiring, training and retention of 20-25 employees
- Assist the GMr with payroll, benefits enrollment, and employee schedules

FEDERAL STUDENT EMPLOYEE

JOB CORPS, PRESTONSBURG, KY

2.2009 - 8.2010

- Job Corps is the largest nationwide residential career training program in the country
- Conduct facility maintenance, basic carpentry, basic electrical in the residential & commercial sector

COMMUNITY SERVICE

BRAND AMBASSADOR, HELPING THE HOMELESS, ATX

2018 - CURRENT

TECHNICAL SKILLS

BAND SAW, MITER SAW, TABLE SAW, CIRCULAR SAW, GRINDERS, DRILLS, SANDERS, PNEUMATIC TOOLS, HAND TOOLS. ABILITY TO DRIVE BOX TRUCKS, SCISSOR LIFT, FORKLIFT

FORKLIFT CERTIFIED, OSHA CERTIFIED

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

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

EDUCATION

UNIVERSITY OF TEXAS, AUSTIN
UNIVERSITY OF SOUTH FLORIDA

Masters, Social Work, 1993
Bachelors, Sociology, 1983

KNOWLEDGE AND SKILLS

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

EXPERIENCE

Director of Client Services, April 2016 to present

PROJECT TRANSITIONS, INC.

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

Special Projects Coordinator, January 2015 to March 2016

TEXAS DEPT OF STATE HEALTH SERVICES

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

Service Integration Coordinator, October 2010 to December 2014

TEXAS DEPT OF STATE HEALTH SERVICES

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

Special Projects Coordinator, January 2006 to September 2010

TEXAS DEPT OF STATE HEALTH SERVICES

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

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

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

EXPERIENCE (CONTINUED)

Training Specialist IV, November 1999 to December 2005 TEXAS DEPT OF STATE HEALTH SERVICES
Provide classroom instruction, skill building, on-site session observation and feedback to new staff on risk assessment and behavior change counseling. Act as point person for new system of 18 different group and community-level evidenced-based interventions implemented across 30 agencies. Provide technical assistance, on-site session observation and feedback, consult with original researchers and act on over 40 requests to tailor programs. Develop statewide technical assistance bulletins. Additionally, provide instruction and technical assistance on measuring client behavior change following engagement in these psycho-educational interventions; assist all contractors in setting goals and pre/post measures.

Educational Services Specialist, January 1992 to October 1999 TEXAS DEPT OF HUMAN SERVICES
Provide classroom instruction and on-the-job training to new employees determining eligibility for Food Stamps, Temporary Assistance to Needy Families and Medicaid. As management trainer, provide instruction on civil rights, sexual harassment, supervisory skills and the personnel process. Act as mediator to resolve conflicts in supervisory relationships, mentor supervisors, negotiate performance improvement plans. Act as 2nd level supervisor of training operations with 60 employees for 8-months. Conduct teambuilding for low-performing work groups; Create and facilitate town meetings.

Social Service Supervisor, November 1989 to December 1991 TEXAS DEPT OF HUMAN SERVICES
Supervise 22 staff performing 10 different functions at over-burdened facility serving 10,000 clients. Manage all points of access: scheduling for 20 caseworkers totaling 400 appointments weekly, sign-off on \$500,000 benefit issuance yearly, oversee weekly problem resolution traffic of 350 clients through front desk and 1000 phone calls; handle all client complaints, automate older systems, plan and implement quality assurance measures. Evaluate employee performance, write employee evaluations, hold counseling conferences, set corrective action plans, and implement the personnel process.

Eligibility Worker III, November 1988 to October 1989 TEXAS DEPT OF HUMAN SERVICES
Supervise 5 staff; manage small Medicaid office out-stationed within large public hospital.

Social Service Supervisor, November 1986 to June 1987 FLORIDA DEPT OF HEALTH
Plan and implement new Medicaid unit across 5 public health clinic and hospital locations. Determine sites, build relationships with providers, negotiate logistics, and create systems. Supervise 11 staff; evaluate employee and site performance, manage operations.

OTHER EXPERIENCE

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

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

Group Facilitator OUTYOUTH, AUSTIN
Facilitate weekly peer support groups; one for high school guys and another for men 18-21 years.



Austin Public Health
7201 Levander Loop, Bldg. H
Austin, TX 78702
(512) 972-5008

February 4, 2021

Project Transitions
Cynthia Herrera, Executive Director
7101 Woodrow Ave
Austin, TX 78757

Re: Project Transitions Ryan White Part A, City General Fund and Housing Opportunities for Persons with AIDS (HOPWA) Site Visit.

Dear Cynthia,

The Austin Transitional Grant Area's (TGA) Ryan White Program, through its consultant, Collaborative Research, recently conducted your agency's Annual Site Visit. The following monitoring report provides detailed information regarding compliance with the Health Resources Services Administration's (HRSA) HIV/AIDS Bureau (HAB) Monitoring Standards, including Fiscal, Universal, Programmatic, and with the Austin TGA's Service.

In the following monitoring report, you will find information on the Background and Objectives of the Annual Site Visit, a list of your agency's funded service categories by funding source, and outcomes for clients served within the Annual Site Visit's review periods. Findings and detailed information on chart reviews by funded service category and corrective action deemed necessary are included, as applicable.

The 2019-2020 Annual Site Visit did not reveal any unsatisfactory results and no further action is required of your agency. To review the summary, please see the Overview of Findings and Corrective Actions section of the attached report.

Thank you,

Justin Ferrill, CPCM
Public Health Program Manager
Austin Public Health
7201 Levander Loop, Bldg. H
Austin, TX 78702
Justin.Ferrill2@austintexas.gov

BACKGROUND

Project Transitions was a subrecipient of the Ryan White Part A HIV/AIDS Program from March 1, 2019 through February 29, 2020; City General Fund Program from October 1, 2019 through September 30, 2020; and HOPWA Program from October 1, 2019 through September 30, 2020.

The U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration's (HRSA) HIV/AIDS Bureau (HAB) administer the Ryan White Program and the U.S. Department of Housing and Urban Development administer the HOPWA program. Grant funding is made available to The City of Austin and the City is the Recipient for the Ryan White and HOPWA programs.

The Ryan White and HOPWA programs consists of multiple service categories with each having its own budget and objectives. The City of Austin contracted with Project Transitions for multiple service categories during the 2019 grant year.

OBJECTIVES

This annual monitoring report documents compliance with HRSA/HAB Monitoring Standards and with the Austin TGA's Standards of Care. Monitoring activities include:

- Resolution of prior Monitoring or Technical Assistance findings
- Completion of contractual obligations
- Compliance with Federal, State, and Local laws applicable to grants
- Compliance with Recipient's policies and procedures
- Program/Quality management controls are in place and operating in accordance with contractual requirements:
 - Universal standards
 - Access to care (HRSA Universal Standard)
 - Anti-kickback statute
 - Reporting requirements
 - Record-keeping systems
 - Client file review
 - Personnel
 - CAREWare
 - Non-discrimination and other assurances

RYAN WHITE PART A FUNDED SERVICE CATEGORIES

The agency was monitored as a RWPA subrecipient during grant year 2019 for the following service categories:

Service Category
Housing and Hospice Services
Medical Transportation

ADMINISTRATIVE/UNIVERSAL REVIEW

The agency was monitored for administrative/programmatic policies and procedures as a RWPA subrecipient for the 2019 grant year (March 1, 2019 through February 29, 2020). The subrecipient is staffed by professionals who communicate essential program components and service delivery models. The subrecipient exhibits clear lines of authority and accountability. The subrecipient and staff understand the roles and responsibilities for implementation of the RWPA grant. The subrecipient policies and procedures comply with the requirements for implementation of the RWPA grant and the service categories for which the subrecipient is providing.

FISCAL REVIEW

The 2019-2020 Fiscal Review did not reveal any unsatisfactory results and no further action is required of your agency.

STRENGTHS

The reviewers would like to commend Project Transitions for their efforts to serve people living with HIV and the affected community. The level of services provided to clients is well documented and is exhibited in the continued success of Project Transitions. Furthermore, the dedication to maintaining good working partnerships with clients to ensure they are linked to HIV care, retained in care, and ultimately reach viral suppression is remarkable. Project Transitions staff exude a commitment to the overall health of its clients and the community and exhibit a thorough understanding of the mission and goals of the Ryan White program.

CORRECTIVE ACTION PLANS and ANNUAL SITE VISIT CLOSURE

The 2019-2020 Annual Site Visit did not reveal any unsatisfactory results and no further action is required of your agency. Please submit any comments, questions, or concerns, to the following Recipient staff:

Will Thomas

Grants Coordinator
Austin Public Health

(512) 972-5079 | William.Thomas@austintexas.gov

CITY GENERAL FUND FUNDED SERVICE CATEGORIES

The agency was monitored as a City General Fund subrecipient during grant year 2019 for the following service categories:

Service Category
Housing and Hospice Services

ADMINISTRATIVE/UNIVERSAL REVIEW

The agency was monitored for administrative/programmatic policies and procedures as a City General Fund subrecipient for the 2019 grant year (October 1, 2019 through September 30, 2020). The subrecipient is staffed by professionals who communicate essential program components and service delivery models. The subrecipient exhibits clear lines of authority and accountability. The subrecipient and staff understand the roles and responsibilities for implementation of the City General Fund grant. The subrecipient policies and procedures comply with the requirements for implementation of the City General Fund grant and the service categories for which the subrecipient is providing.

STRENGTHS

The reviewers would like to commend Project Transitions for their efforts to serve people living with HIV and the affected community. The level of services provided to clients is well documented and is exhibited in the continued success of Project Transitions. Furthermore, Project Transitions continues to demonstrate the dedication to maintaining good working partnerships with clients to ensure they are linked to HIV care, retained in care, and ultimately reach viral suppression. The Project Transitions staff exude a commitment to the overall health of its clients and the community and exhibit a thorough understanding of the mission and goals of the Ryan White program.

CORRECTIVE ACTION PLANS and ANNUAL SITE VISIT CLOSURE

The 2019-2020 Annual Site Visit did not reveal any unsatisfactory results and no further action is required of your agency. Please submit any comments, questions, or concerns, to the following Recipient staff:

Will Thomas

Grants Coordinator

Austin Public Health

(512) 972-5079 | William.Thomas@austintexas.gov

RYAN WHITE HOPWA FUNDED SERVICES

The agency was monitored as a HOPWA subrecipient during grant year 2019 for the following service categories:

Service Category
HOPWA

ADMINISTRATIVE/UNIVERSAL REVIEW

The agency was monitored for administrative/programmatic policies and procedures as a HOPWA subrecipient for the 2019 grant year (October 1, 2019 through September 30, 2020). The subrecipient is staffed by professionals who communicate essential program components and service delivery models. The subrecipient exhibits clear lines of authority and accountability. The subrecipient and staff understand the roles and responsibilities for implementation of the HOPWA grant. The subrecipient policies and procedures comply with the requirements for implementation of the HOPWA grant and the service categories for which the subrecipient is providing.

STRENGTHS

The reviewers would like to commend Project Transitions for their efforts to serve people living with HIV and the affected community. The level of services provided to clients is well documented and is exhibited in the continued success of Project Transitions. Furthermore, Project Transitions continues to demonstrate the dedication to maintaining good working partnerships with clients to ensure they are linked to HIV care, retained in care, and ultimately reach viral suppression. The Project Transitions staff exude a commitment to the overall health of its clients and the community and exhibit a thorough understanding of the mission and goals of the Ryan White program.

CORRECTIVE ACTION PLANS and ANNUAL SITE VISIT CLOSURE

The 2019-2020 Annual Site Visit did not reveal any unsatisfactory results and no further action is required of your agency. Please submit any comments, questions, or concerns, to the following Recipient staff:

Will Thomas

Grants Coordinator

Austin Public Health

(512) 972-5079 | William.Thomas@austintexas.gov

HRSA/HAB FISCAL MONITORING STANDARDS

Page 1: Section A: Limitation on Uses of Part A funding

Q1

What Subrecipient is this for?

Project Transitions

Q2

Aggregated subgrantee administrative expenses total not more than 10% of Part A service dollars (RWHAP Part A and B recipients (grantees) must ensure that the aggregate total of subrecipient administrative expenditures does not exceed 10% of the aggregate total of funds awarded to subrecipients)

Satisfactory,

Comments (please specify):

- Subrecipient budget prepared and expenses tracked with sufficient detail to allow for identification of administrative expenses.
-

Q3

Appropriate subgrantee assignment of Ryan White Part A administrative expenses, with administrative costs to include: Subrecipient administrative activities include: • usual and recognized overhead activities, including established indirect rates for agencies; • management oversight of specific programs funded under the RWHAP; and • other types of program support such as quality assurance, quality control, and related activities (exclusive of RWHAP CQM).

Satisfactory,

Comments (please specify):

- Subrecipient prepared project budget that meets administrative cost guidelines. • Subrecipient provided expense reports that track administrative expenses with sufficient detail to permit for review of administrative cost elements.
-

Page 2: Section B: Unallowable Costs

Q4

The grantee shall provide to all Part A subgrantees definitions of unallowable costs

Satisfactory,

Comments (please specify):

- Subrecipient maintains subgrant agreement, assurances, and/or certifications that specify unallowable costs. • Subrecipient budgets do not include unallowable costs. • Subrecipient expenditures do not include unallowable costs. • Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Q5

No use of Part A funds to purchase or improve land, or to purchase, construct, or permanently improve any building or other facility (other than minor remodeling)

Satisfactory,

Comments (please specify):

• Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Q6

No cash payments to service recipients Note: A cash payment is the use of some form of currency (paper or coins). Gift cards have an expiration date; therefore, they are not considered to be cash payments.

Satisfactory,

Comments (please specify):

• Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Q7

No use of Part A funds for the purchase of vehicles without written Grants Management Officer (GMO) approval

Satisfactory,

Comments (please specify):

• Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Q8

No use of Part A funds for:• Non-targeted marketing promotions or advertising about HIV services that target the general public (poster campaigns for display on public transit, TV or radio public service announcements, etc.)• Broad-scope awareness activities about HIV services that target the general public

Satisfactory,

Comments (please specify):

• Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Q9

No use of Part A funds for outreach activities that have HIV prevention education as their exclusive purpose

Satisfactory,

Comments (please specify):

• Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Q10

No use of Part A funds for influencing or attempting to influence members of Congress and other Federal personnel

Satisfactory,

Comments (please specify):

• Subrecipient financial expense reports contain sufficient detail to document that they do not include unallowable costs.

Section C: Income from Fees for Services Performed

Q11

Use of Part A and other funding sources to maximize program income from third party sources and ensure that Ryan White is the payer of last resort. Third party funding sources include: • Medicaid • State Children's Health Insurance Programs (SCHIP) • Medicare (including the Part D prescription drug benefit) and Private insurance

Satisfactory,

Comments (please specify):

• Subrecipient has policies on the requirement that Ryan White is the payer of last resort and how that requirement is met. • Subrecipient has policies and procedures in place to screen each client for insurance coverage and third-party programs. • Subrecipient has policies and procedures in place so that Ryan White resources are used only when a third-party payer is not available. • Subrecipient has established and maintains a system for billing.

Q12

Ensure billing and collection from third party payers, including Medicare and Medicaid, so that payer of last resort requirements are met

Satisfactory,

Comments (please specify):

• Subrecipient has policies and procedures in place for billing and collection of payments. • Subrecipient has documentation of accounts receivable for Medicaid, Medicare.

Q13

Ensure subgrantee participation in Medicaid and certification to receive Medicaid payments.

Satisfactory,

Comments (please specify):

• Subrecipient has an exemption from the Texas Department of State Health Services for Speciality Care Facility.

Q14

Ensure billing, tracking, and reporting of program income by subgrantees

Satisfactory,

Comments (please specify):

• Subrecipient has method for tracking and reporting of program income.

Q15

Ensure service provider retention of program income derived from Ryan White-funded services and use of such funds in one or more of the following ways: • Funds added to resources committed to the project or program, and used to further eligible project or program objectives • Funds used to cover program costs Note: Program income funds are not subject to the federal limitations on administration (10%), quality management (5%), or core medical services (75% minimum). For example, all program income can be spent on administration of the Part A program, however HRSA does encourage funds be used for services.

Satisfactory,

Comments (please specify):

• Subrecipient has method for tracking and reporting of program income.

Section D: Imposition & Assessment of Client Charges

Q16

Ensure subgrantee policies and procedures require a publicly posted schedule of charges (e.g. sliding fee scale) to clients for services, which may include a documented decision to impose only a nominal charge

Satisfactory,

Comments (please specify):

- Subrecipient has policies and procedures available for review on schedule of charges (sliding fee scale).
- Subrecipient has established a methodology for documenting client charges and payments through an accounting system.

Q17

No charges imposed on clients with incomes below 100% of the Federal Poverty Level (FPL)

Satisfactory,

Comments (please specify):

- Subrecipient has policies and procedures available for review on schedule of charges (sliding fee scale). Policy for schedule of charges does not allow clients below 100% of FPL to be charged for services.

Q18

Charges to clients with incomes greater than 100% of poverty are determined by the schedule of charges. Annual limitation on amounts of charge (i.e. caps on charges) for Ryan White services are based on the percent of client's annual income, as follows:• 5% for clients with incomes between 100% and 200% of FPL• 7% for clients with incomes between 200% and 300% of FPL• 10% for clients with incomes greater than 300% of FPL

Satisfactory,

Comments (please specify):

- Subrecipient has policy for schedule of charges does not include a cap on charges for clients.

Page 5: Section E: Financial Management

Q19

Compliance with all the established requirements in the Code of Federal Regulations (CFR) for (a) state and local governments; and (b) non-profit organizations, hospitals, commercial organizations and institutions of higher education. Included are for:• Payments for services• Program income• Revision of budget and program plans• Non-federal audits• Property standards, including insurance coverage, equipment, supplies, and other expendable property• Procurement standards, including recipient responsibilities, codes of conduct, competition, procurement procedures, cost and price analysis, and procurement records. • Reports and records, including monitoring and reporting, program performance, financial reports, and retention and access requirements• Termination and enforcement and closeout procedures

Satisfactory,

Comments (please specify):

- Subrecipient has an established accounting system in place to create financial activity reports.
- Subrecipient has policies and procedures that include billing, collections, purchasing and procurement.
- Subrecipient has policies and procedures for accounts payable systems.

Q20

Comprehensive subgrantee budgets and reports with sufficient detail to account for Ryan White funds by service category, subgrantee, administrative costs, and (75/25 rule) core medical and support services rules, and to delineate between multiple funding sources and show program income

Satisfactory,

Comments (please specify):

- Subrecipient has policies and procedures for accounting, budgets, and accounting system reports.

Q21

Provider subgrant agreements and other contracts meet all applicable federal and local statutes and regulations governing subgrant/contract award and performance

Satisfactory

Page 6: Section F: Property Standards

Q22

Subgrantee tracking of and reporting on tangible nonexpendable personal property, including exempt property, purchased directly with Ryan White Part A funds and having: • A useful life of more than one year, and • An acquisition cost of \$5,000 or more per unit (Lower limits may be established, consistent with recipient policies)

Satisfactory,

Comments (please specify):

- Subrecipient did not purchase tangible nonexpendable personal property with Ryan White funds.

Q23

Implementation of adequate safeguards for all capital assets that assure that they are used solely for authorized purposes

Satisfactory,

Comments (please specify):

- Subrecipient did not purchase tangible nonexpendable personal property with Ryan White funds.

Q24

Real property, equipment, intangible property, and debt instruments acquired or improved with federal funds held in trust by subgrantees, with title of the property vested in the subgrantee but with the federal government retaining a reversionary interest

Satisfactory,

Comments (please specify):

- Subrecipient did not purchase tangible nonexpendable personal property with Ryan White funds.

Q25

Assurance by subgrantees that: • Title of federally-owned property remains vested in the federal government • If the HHS awarding agency has no further need for the property, it will be declared excess and reported to the General Services Administration

Satisfactory,

Comments (please specify):

- Subrecipient did not purchase tangible nonexpendable personal property with Ryan White funds.

Q26

Title to supplies to be vested in the recipient upon acquisition, with the provision that if there is a residual inventory of unused supplies exceeding \$5,000 in total aggregate value upon termination or completion of the program and the supplies are not needed for any other federally-sponsored program, the recipient shall: • Retain the supplies for use on non-federally sponsored activities or sell them • Compensate the federal government for its share contributed to purchase of supplies

Satisfactory,

Comments (please specify):

• Subrecipient did not purchase tangible nonexpendable personal property with Ryan White funds.

Page 7: Section G: Cost Principles

Q27

Payments made to subgrantees for services need to be cost based and relate to Ryan White administrative, quality management, and programmatic costs in accordance with standards cited under OMB Circulars or the Code of Federal Regulations

Satisfactory,

Comments (please specify):

• Subrecipient budgets and expenses conform to federal cost principles.

Q28

Payments made for services to be reasonable, not exceeding costs that would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the costs

Satisfactory,

Comments (please specify):

• Subrecipient provided detailed information on the allocation and cost of expenses for services provided.

Q29

Written subgrantee procedures for determining the reasonableness of costs, the process for allocations, and the policies for allowable costs, in accordance with the provisions of applicable Federal cost principles and the terms and conditions of the award. Costs are considered to be reasonable when they do not exceed what would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the costs

Satisfactory,

Comments (please specify):

• Subrecipient has established policies and procedures to determine allowable and reasonable costs. • Subrecipient has established a reasonable methodology for allocating costs among different funding sources. • Subrecipient has provided policies and procedures for cost allocations plan.

Q30

Calculate unit costs by subgrantees based on an evaluation of reasonable cost of services; financial data must relate to performance data and include development of unit cost information whenever practical. Note: When using unit costs for the purpose of establishing fee-for-service charges, the GAAP† definition can be used. Under GAAP, donated materials and services, depreciation of capital improvement, administration, and facility costs are allowed when determining cost. • If unit cost is the method of reimbursement, it can be derived by adding direct program costs and allowable administrative costs, capped at 10%, and dividing by number of units of service to be delivered.

Satisfactory,

Comments (please specify):

- Subrecipient has established policies and procedures to demonstrate client utilization data and sufficient detail to determine reasonableness of unit costs.

Q31

Requirements to be met in determining the unit cost of a service: • Unit cost not to exceed the actual cost of providing the service • Unit cost to include only expenses that are allowable under Ryan White requirements • Calculation of unit cost to use a formula of allowable administrative costs plus allowable program costs divided by number of units to be provided

Satisfactory,

Comments (please specify):

- Subrecipient has established policies and procedures to demonstrate client utilization data and sufficient detail to determine reasonableness of unit costs.

Page 8: Section H: Auditing Requirements

Q32

Recipients and sub-recipients of Ryan White funds that are institutions of higher education or other non-profit organizations (including hospitals) are subject to the audit requirements contained in the Single Audit Act Amendments of 1996 (31 USC 7501–7507) and revised OMB Circular A-133, with A-133 audits required for all grantees and subgrantees receiving more than \$750,000 per year in federal grants

Satisfactory,

Comments (please specify):

- Subrecipient provided independent auditor with income and expense reports to conduct annual audit. • Subrecipient provided annual audit with a requested management letter from the auditor for review.

Q33

Based on criteria established by the grantee, subgrantees or sub-recipients of Ryan White funds that are small programs (i.e. receive less than \$750,000 per year in federal grants) may be subject to audit as a major program (i.e. a program that receives more than \$750,000 in aggregate federal funding) pursuant to OMB Circular 1-133, Section .215 c)

Satisfactory,

Comments (please specify):

- Subrecipient provided independent auditor with financial and other documents required to conduct a major program audit. • Subrecipient complied with contract audit requirements on a timely basis.

Q34

Selection of auditor to be based on Audit Committee for Board of Directors (if non-profit) policy and process

Satisfactory,

Comments (please specify):

- Subrecipient has established financial policies and procedures for independent audit.

Q35

Review of audited financial statements to verify financial stability of organization

Satisfactory,

Comments (please specify):

- Subrecipient provided independent auditor with financial and other documents required to conduct a major program audit.
- Subrecipient complied with contract audit requirements on a timely basis.

Q36

A-133 audits to include statements of conformance with financial requirements and other federal expectations

Satisfactory,

Comments (please specify):

- Subrecipient provided independent auditor with financial and other documents required to conduct a major program audit.
- Subrecipient complied with contract audit requirements on a timely basis.

Q37

Subgrantees expected to note reportable conditions from the audit and provide a resolution.

Satisfactory,

Comments (please specify):

- Subrecipient provided independent auditor with financial and other documents required to conduct a major program audit.
- Subrecipient complied with contract audit requirements on a timely basis.
- Independent audit report did not contain reportable conditions or audit findings.

Page 9: Section K: Fiscal Procedures

Q38

Subgrantee policies and procedures in place for handling revenues from the Ryan White grant, including program income

Satisfactory,

Comments (please specify):

- Subrecipient has established policies and procedures for handling Ryan White revenue including program income.
- Subrecipient has a detailed chart of accounts and general ledger that provide for tracking of Part A program income.

Q39

Right of the awarding agency to inspect and review records and documents that detail the programmatic and financial activities of subgrantees in the use of Ryan White funds

Satisfactory

Q40

Awarding agency to have access to payroll records, tax records, and invoices with supporting documentation to show that expenses were actually paid appropriately with Ryan White funds

Satisfactory,

Comments (please specify):

- Subrecipient has established in a contractual obligation with the Recipients office that allows for the grantee as funding agency prompt and full access to financial, program, and management records and documents as needed for program and fiscal monitoring and oversight.

Q41

Employee time and effort to be documented, with charges for the salaries and wages of hourly employees to: Be supported by documented payrolls approved by the responsible official • Reflect the distribution of activity of each employee • Be supported by records indicating the total number of hours worked each day

Satisfactory,

Comments (please specify):

- Subrecipient has policies and procedures for allocations for expenditures where employees are engaged in activities supported by multiple funding sources.

Page 10: Section L: Unobligated Balances

Q42

EMA/TGA demonstration of its ability to expend fund efficiently by expending 95% of its formula funds in any grant year

Satisfactory,

Comments (please specify):

N/A

HRSA/HAB UNIVERSAL MONITORING STANDARDS

Page 1: Section A: Access to Care

Q1

What Subrecipient is this for?

Project Transitions

Q2

Structured and ongoing efforts to obtain input from clients in the design and delivery of services.

Satisfactory,

Comments (please specify):

The agency demonstrated structured and ongoing efforts to obtain input from clients in the design and delivery of services.

Q3

Provision of services regardless of an individual's ability to pay for the service

Satisfactory,

Comments (please specify):

The agency demonstrated the provision of services regardless of an individual's ability to pay for the service.

Q4

Provision of services regardless of the current or past health condition of the individual to be served

Satisfactory,

Comments (please specify):

The agency demonstrated the provision of services regardless of the current or past health condition of the individual to be served.

Q5

Provision of services in a setting accessible to low-income individuals with HIV disease

Satisfactory,

Comments (please specify):

The agency demonstrated the provision of services in a setting accessible to low-income individuals with HIV disease.

Q6

Outreach to inform low-income individuals of the availability of HIV-related services and how to access them

Satisfactory,

Comments (please specify):

The agency demonstrated outreach to inform low-income individuals of the availability of HIV-related services and how to access them.

Page 2: Section B: Eligibility Determination

Q7

Eligibility determination and reassessment of clients to determine eligibility as specified by the jurisdiction or ADAP: Eligibility determination of clients to determine eligibility for Ryan White services within a predetermined timeframe Reassessment of clients at least every 6 months to determine continued eligibility

Satisfactory,

Comments (please specify):

The agency demonstrated eligibility determination and reassessment of clients to determine eligibility as specified by the jurisdiction or ADAP.

Q8

Ensure military veterans with Department of Veterans Affairs (VA) benefits are deemed eligible for Ryan White services

Satisfactory

Page 3: Section C: Anti-Kickback Statute

Q9

Demonstrated structured and ongoing efforts to avoid fraud, waste and abuse (mismanagement) in any federally funded program

Satisfactory,

Comments (please specify):

The agency demonstrated structured and ongoing efforts to avoid fraud, waste, and abuse (mismanagement) in any federally funded program.

Q10

Prohibition of employees (as individuals or entities), from soliciting or receiving payment in kind or cash for the purchase, lease, ordering, or recommending the purchase, lease, or ordering, of any goods, facility services, or items.

Satisfactory,

Comments (please specify):

The agency demonstrated prohibition of employees (as individuals or entities), from soliciting or receiving payment in kind or cash for the purchase, lease, ordering, or recommending the purchase, lease, or ordering, of any goods, facility services or items.

Page 4: Section D: Grantee Accountability

Q11

Proper stewardship of all grant funds including compliance with programmatic requirements

Satisfactory,

Comments (please specify):

The agency demonstrated business management systems that meet the requirements of the Office of Management and Budget code of federal regulations, programmatic expectations outlined in the recipient assurances, and the Notice of Grant Award.

Q12
Business management systems that meet the requirements of the Office of Management and Budget code of federal regulations, programmatic expectations outlined in the grantee assurances and the Notice of Grant Award

Satisfactory,
Comments (please specify):
The agency demonstrated responsibility for activates that are supported under the Ryan White Program as outlined by Office of Management and Budget, Code of Federal Regulations, HHS Grant Policy Statement Program Assurances, and Notice of Grant Award (NOA)

Q13
Responsibility for activities that are supported under the Ryan White Program as outlined by Office of Management and Budget, Code of Federal Regulations, HHS Grant Policy Statement Program Assurances, and Notice of Grant Award (NOA)

Satisfactory

Page 5: Section F: Monitoring

Q14
Any grantee or subgrantee or individual receiving federal funding is required to monitor for compliance with federal requirements and programmatic expectations

Satisfactory

Q15
Performance of fiscal monitoring activities to ensure Ryan White funds are only used for approved purposes

Not Applicable

Q16
Salary Limit: HRSA funds may not be used to pay the salary of an individual at a rate in excess of \$189,600. This amount reflects an individual's base salary exclusive of fringe and any income that an individual may be permitted to earn outside of the duties to the applicant organization. This salary limitation also applies to subawards/subcontracts for substantive work under a HRSA grant or cooperative agreement.

Not Applicable

Q17
Salary Limit Fringe Benefits: If an individual is under the salary cap limitation, fringe is applied as usual. If an individual is over the salary cap limitation, fringe is calculated on the adjusted base salary.

Not Applicable

CATEGORY SPECIFIC UNIVERSAL STANDARDS

Page 6: Section G: Category Specific Universal Standards

Q19

EMERGENCY FINANCIAL ASSISTANCE: Provider adheres to the Planning Council written guidelines that list the criteria, including allowable extenuating circumstances to determine if a client is eligible for financial assistance.

Not Applicable,
Other (please specify):
NOT FUNDED

Q20

EMERGENCY FINANCIAL ASSISTANCE: Agency provides orientation for staff members and follows written guidelines, without exception

Not Applicable,
Other (please specify):
NOT FUNDED

Q21

EMERGENCY FINANCIAL ASSISTANCE: Services are made available to all individuals who meet EFA program eligibility requirements.

Not Applicable,
Other (please specify):
NOT FUNDED

Q22

EMERGENCY FINANCIAL ASSISTANCE: Letter of collaboration in place between providers/case management agencies.

Not Applicable,
Other (please specify):
NOT FUNDED

Q23

EMERGENCY FINANCIAL ASSISTANCE: Agencies stay within the emergency financial assistance cap or inform the case managers when it will be exceeded.

Not Applicable,
Other (please specify):
NOT FUNDED

Q24

EARLY INTERVENTION SERVICES: Subrecipient's providing EIS coordinate project activities with HIV prevention efforts and programs.

Not Applicable,
Other (please specify):
NOT FUNDED

Q25

EARLY INTERVENTION SERVICES: EIS staff will work with HIV testing sources (traditional and nontraditional) to modify process for informing those tested of result.

Not Applicable,
Other (please specify):
NOT FUNDED

<p>Q26</p> <p>EARLY INTERVENTION SERVICES: Subrecipient's providing EIS document and track all referrals to and from the program.</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>
<p>Q27</p> <p>EARLY INTERVENTION SERVICES: All EIS services are provided by a trained professional</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>
<p>Q28</p> <p>HIPCSA: Provider agency has clearly stated, written guidelines that list all criteria, including allowable extenuating circumstances, used to determine if a client is eligible for health insurance premium or cost-sharing.</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>
<p>Q29</p> <p>HIPCSA: Agency provides comprehensive orientation for new staff members to ensure that staff is fully trained to implement the written guidelines.</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>
<p>Q30</p> <p>HIPCSA: Services are made available to all individuals who meet HIPCSA program eligibility requirements.</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>
<p>Q31</p> <p>HIPCSA: Agency follows written guidelines, without exception, for all requests.</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>
<p>Q32</p> <p>HOUSING: Provider agency ensures that housing staff is qualified and trained for the responsibilities of providing housing services and administering the housing program.</p>	<p>Satisfactory</p>
<p>Q33</p> <p>MEDICAL CASE MANAGEMENT: Define role expectations and tasks of the MCM with signed job descriptions clearly defining roles of staff members with HIPAA acknowledgement forms signed in MCM HR file.</p>	<p>Not Applicable, Other (please specify): NOT FUNDED</p>

Q34

MEDICAL CASE MANAGEMENT: Participate in training as mandated by Parts A, B, C, D baseline for new MCMs and annually. See Training Components.

Not Applicable,
Other (please specify):
NOT FUNDED

Q35

MEDICAL CASE MANAGEMENT: All Ryan White services not covered by Title XIX or another medical insurer must have documentation to indicate the service(s) provided are not allowable under the health plan.

Not Applicable,
Other (please specify):
NOT FUNDED

Q36

MEDICAL CASE MANAGEMENT: Medical Case Managers must receive minimum training requirements per Parts A, B, C, D

Not Applicable,
Other (please specify):
NOT FUNDED

Q37

MEDICAL TRANSPORTATION: Provider agency has a comprehensive Policy & Procedures Manual that contains:

Respondent skipped this question

Q38

MEDICAL TRANSPORTATION: Provider agency ensures that transportation staff is qualified and trained for the responsibilities of providing transportation and administering the transportation program

Not Applicable,
Other (please specify):
NOT FUNDED

Q39

MEDICAL TRANSPORTATION: Agency owned/leased vehicles used in transportation services are routinely serviced and maintained every 3,000 miles.

Not Applicable,
Other (please specify):
NOT FUNDED

Q40

MEDICAL TRANSPORTATION: Vehicles used in transportation services are insured.

Not Applicable,
Other (please specify):
NOT FUNDED

Q41

MEDICAL TRANSPORTATION: Provider agency ensures that all transportation operators understand their responsibilities and agree to follow agency policies.

Not Applicable,
Other (please specify):
NOT FUNDED

Q42

MENTAL HEALTH: Efficacy of Services: Clients are offered a standardized Ryan White client satisfaction survey annually.

Not Applicable,

Other (please specify):

NOT FUNDED

Q43

OAHS: Services are provided by trained professionals.

Not Applicable,

Other (please specify):

NOT FUNDED

Q44

OAHS: Staff providing services have been trained to work within the population.

Not Applicable,

Other (please specify):

NOT FUNDED

Q45

SUBSTANCE ABUSE INPATIENT: Staff licensure and accreditation: As per Connecticut State Statutes and DMHAS regulations, professional staff will be licensed, certified, or supervised by a licensed Drug Treatment professional

Not Applicable,

Other (please specify):

NOT FUNDED

Q46

SUBSTANCE ABUSE INPATIENT: Unlicensed/certified staff members serving Ryan White clients will attend at least 10 hours of Substance Abuse specific training annually

Not Applicable,

Other (please specify):

NOT FUNDED

Q47

SUBSTANCE ABUSE OUTPATIENT: Staff licensure and accreditation: As per Connecticut State Statutes and DMHAS regulations, professional staff will be licensed, certified, or supervised by a licensed Drug Treatment professional.

Not Applicable,

Other (please specify):

NOT FUNDED

Q48

SUBSTANCE ABUSE OUTPATIENT: Unlicensed/certified staff members serving Ryan White clients will attend at least 10 hours of Substance Abuse specific training annually.

Not Applicable,

Other (please specify):

NOT FUNDED

Q49

SUBSTANCE ABUSE OUTPATIENT: Client satisfaction surveys are conducted. Clients are offered a client satisfaction survey annually.

Not Applicable,

Other (please specify):

NOT FUNDED

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3a. Federal IRS Certification



Department of the Treasury
Internal Revenue Service

P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248205661
Oct. 09, 2015 LTR 4168C 0
74-2502171 000000 00

00015521

BODC: TE

PROJECT TRANSITIONS INC
% PROJ
7101 B WOODROW
AUSTIN TX 78757



025164

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

Dear Taxpayer:

This is in response to your Sep. 30, 2015, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in September 1988.

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

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

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

0248205661
Oct. 09, 2015 LTR 4168C \$0
74-2502171 000000 00
00015522

PROJECT TRANSITIONS INC
% PROJ
7101 B WOODROW
AUSTIN TX 78757

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

Sincerely yours,



Doris Kenwright, Operation Mgr.
Accounts Management Operations 1

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3b. Certified Financial Audit

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3c. Board Resolution

RESOLUTION
Board of Directors of
Project Transitions, Inc.

Burnet Place Apartments

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

Rental Housing Development Assistance Funding in the amount up to \$300,000 for a proposed affordable housing, rental community located at 8007 Burnet Road, Austin, TX 78757. The funding will be used for hard/soft construction costs.

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

Adopted and approved by the Board of Directors on the 27th day of October 2022.

Project Transitions, Inc.



_____, Acting Secretary

Board of Directors
Project Transitions, Inc.

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3d. Financial Statements

**NOT
APPLICABLE**

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3e. Funding Commitment Letters

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4a. Market Study

**PREVIOUSLY
PROVIDED**

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4b. Good Neighbor Policy



ATTACHMENT 4: PROJECT PROPOSAL

c. Good Neighbor Policy:

BURNET PLACE APARTMENTS

8007 Burnet Road
Austin, TX 78757

CONTACT

Madge Whistler, COO/CFO
Project Transitions, Inc.
7101 Woodrow Avenue
Austin, TX 78757
(512) 454-8646
finance@projecttransitions.org

COMMUNICATIONS PLAN FOR NEIGHBORHOOD ENGAGEMENT

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

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

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

Wooten Neighborhood Association
Wooten Neighborhood Plan Contact Team

Neighborhood Plan: The development is located in the Crestview/Wooten Combined Neighborhood Plan located at the link below:

http://www.austintexas.gov/sites/default/files/files/Housing_%26_Planning/Adopted%20Neighborhood%20Planning%20Areas/07_Crestview-WootenCombined/crest-wooten-np.pdf



- 1) **Neighborhood Contact:** Project Transitions has reached out to the Wooten Neighborhood Association and Wooten Neighborhood Plan Contact Team and has met with the team several times throughout the development process. Most recently, the team reached out to the neighborhood to give them the great news that the vacant building was being demolished.
- 2) **Neighborhood Notification** – There was no zoning change needed for Burnet Place Apartments; however neighborhood notifications were sent out for the TDHCA funding applications and those are attached.
- 3) **Neighborhood Engagement** – At the neighborhood meetings, Project Transitions presented information about their organization, plans for design of the building and talked about who will live at the property and what services will be offered. PT invited a board member to attend, as well.
 - After initial phone contact, meetings were scheduled with the pertinent neighborhood organization. PT will make sure that the neighborhood organization will continue to be plugged into the development and milestones and progress along the way.
 - PT will create a social media platform that will contain the most updated information on the project for easy public dissemination.
 - PT will invite neighborhood members to volunteer events to get more involved with the organization.
- 4) **Implementation/Ongoing Relations** - Project Transitions, Inc. will implement the following processes to encourage ongoing relations with neighborhood members:
 - Neighborhood members will be invited to the Ground Breaking and Ribbon Cutting events that will be held for the property. Neighborhoods will be given recognition for their support.
 - PT will invite neighborhood members to participate in services programs being offered at our community.
 - PT will invite and educate neighborhood members on the many ways to volunteer with the organization.
 - PT will establish an open-door policy so that neighborhood members will feel comfortable communicating any concerns with either the on-site property management or the single point of contact.



PROJECT TRANSITIONS

Doug's House
Hospice &
Recuperative Care

Roosevelt Gardens
Supportive Housing

Highland Terrace
Independent Living

Community Housing
Scattered-Site Housing

Top Drawer Thrift
Thrift Store

Board of Directors
Craig Davis, President
Bob Garza, VP
Matthew Albertson
Cindy Goldman
Scott Percifull
Tamra Swindoll
Anthony West

Executive Director
Cynthia Y. Herrera, J.D.

Director of Finance
Madge Whistler

**Director of
Client Services**
Todd Logan, LMSW

Housing Manager
Julie Benziger

**Volunteer &
Facilities Manager**
Blythe Plunkett

Top Drawer Thrift
Karin Kokinda

July 21, 2020

Wooten Neighborhood Plan Contact Team
Attn: Adam W. Turner
P.O. Box 10171
Austin, TX 78766

Dear Mr. Turner,

Project Transitions, Inc. is making an application for a Multifamily Direct Loan with the Texas Department of Housing and Community Affairs for Burnet Place Apartments, 8007 Burnet Road, Austin, TX 78757 in Travis County. This New Construction is a(n) apartment community, and composed of approximately 61 units of which 61 will be for low-income tenants. The residential density of the Development, i.e., the number of Units per acre is approximately 56 units per acre.

In the spring, the Department will hold public hearings in various locations around the state to gather input on Competitive Housing Tax Credit applications. The hearing schedule along with contact information for written public comment will be posted on TDHCA's [Public Comment Center](#) website later this year.

For Direct Loan only Applications, public comment on the proposed development will be accepted as described below.

An interested party or Neighborhood Organization can provide comments on any and all applications at each hearing, or can provide written comments to the Department by email at HTCPC@mail.tdhca.state.tx.us, or by mail at:

Texas Department of Housing and Community Affairs
Public Comment – Multifamily Finance Division
P.O. Box 13941
Austin, Texas 78711-3941

Sincerely,

Cynthia Herrera, Executive Director
Project Transitions, Inc.
7107 Woodrow Avenue
Austin, TX 78757
512.454.8646 x. 102
cherrera@projecttransitions.org



PROJECT TRANSITIONS

Doug's House
Hospice &
Recuperative Care

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**Volunteer &
Facilities Manager**
Blythe Plunkett

Top Drawer Thrift
Karin Kokinda

July 21, 2020

Wooten Neighborhood Association
Attn: Marilyn Rogers
8309 Bowling Green Dr.
Austin, TX 78757

Dear Ms. Rogers,

Project Transitions, Inc. is making an application for a Multifamily Direct Loan with the Texas Department of Housing and Community Affairs for Burnet Place Apartments, 8007 Burnet Road, Austin, TX 78757 in Travis County. This New Construction is a(n) apartment community, and composed of approximately 61 units of which 61 will be for low-income tenants. The residential density of the Development, i.e., the number of Units per acre is approximately 56 units per acre.

In the spring, the Department will hold public hearings in various locations around the state to gather input on Competitive Housing Tax Credit applications. The hearing schedule along with contact information for written public comment will be posted on TDHCA's [Public Comment Center](#) website later this year.

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Texas Department of Housing and Community Affairs
Public Comment – Multifamily Finance Division
P.O. Box 13941
Austin, Texas 78711-3941

Sincerely,

Cynthia Herrera, Executive Director
Project Transitions, Inc.
7107 Woodrow Avenue
Austin, TX 78757
512.454.8646 x. 102
cherrera@projecttransitions.org



PROJECT TRANSITIONS

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Todd Logan, LMSW

Housing Manager
Julie Benziger

**Volunteer &
Facilities Manager**
Blythe Plunkett

Top Drawer Thrift
Karin Kokinda

July 21, 2020

North Austin Neighborhood Alliance
Attn: Chip Harris
P.O. Box 9723
Austin, TX 78766

Dear Mr. Harris,

Project Transitions, Inc. is making an application for a Multifamily Direct Loan with the Texas Department of Housing and Community Affairs for Burnet Place Apartments, 8007 Burnet Road, Austin, TX 78757 in Travis County. This New Construction is a(n) apartment community, and composed of approximately 61 units of which 61 will be for low-income tenants. The residential density of the Development, i.e., the number of Units per acre is approximately 56 units per acre.

In the spring, the Department will hold public hearings in various locations around the state to gather input on Competitive Housing Tax Credit applications. The hearing schedule along with contact information for written public comment will be posted on TDHCA's [Public Comment Center](#) website later this year.

For Direct Loan only Applications, public comment on the proposed development will be accepted as described below.

An interested party or Neighborhood Organization can provide comments on any and all applications at each hearing, or can provide written comments to the Department by email at HTCPC@mail.tdhca.state.tx.us, or by mail at:

Texas Department of Housing and Community Affairs
Public Comment – Multifamily Finance Division
P.O. Box 13941
Austin, Texas 78711-3941

Sincerely,

Cynthia Herrera, Executive Director
Project Transitions, Inc.
7107 Woodrow Avenue
Austin, TX 78757
512.454.8646 x. 102
cherrera@projecttransitions.org

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4c. SMART Housing Letter



City of Austin

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

Neighborhood Housing and Community Development Department

November 19, 2019 (Revision to letter dated April 30, 2019)

S.M.A.R.T. Housing Certification- Project Transitions, Inc. – Burnet Place Apartments – (Project ID 656)

TO WHOM IT MAY CONCERN:

Project Transitions, Inc. (development contact: Jennifer Hicks: (m) 512-203-4417; jennifer@truecasa.net) is planning to develop the Burnet Place Apartments, a **61-unit multi-family** development at 8007 Burnet Road, Austin TX 78757. The project is subject to a **40-year** affordability period after issuance of certificate of occupancy.

This revision changes the total unit count from 55 to 61 and changed the affordability period to 40 years.

Neighborhood Housing and Community Development (NHCD) certifies the proposed project meets the S.M.A.R.T. Housing standards at the pre-submittal stage. Since **100%** of the units will serve households at or below **50% MFI**, the development will be eligible for 100% waiver of fees listed in Land Development Code, Chapter 25-1-704, as amended or other fees waived under a separate ordinance. The expected fee waivers include, but are not limited to, the following fees:

Capital Recovery Fees
Building Permit
Concrete Permit
Electrical Permit
Mechanical Permit
Plumbing Permit

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

Land Status Determination
Building Plan Review
Parkland Dedication (*by separate ordinance*)
Neighborhood Plan
Amendment 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 the required accessibility or visitability 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 S.M.A.R.T. Housing standards after the after the certificate of occupancy has been issued 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 512.974.3128 or by email at Sandra.harkins@austintexas.gov if you need additional information.

Sincerely,



Sandra Harkins, Project Coordinator
Neighborhood Housing and Community Development

Cc: Rosa Gonzales, AE Ellis Morgan, NHCD Jonathan Orenstein, AWU
Mashell Smith, ORS

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4d. MOU with ECHO

Memorandum of Understanding (MOU) for Continuum of Care Units

**Memorandum of Understanding (MOU) Between
Ending Community Homelessness Coalition (ECHO) and Rental Housing
Development Assistance (RHDA) Applicant**

I. OVERVIEW

- To qualify for a Continuum of Care unit, applicants will meet the following definition of homelessness:
 1. "Households that qualify as homeless under the HUD HEARTH Act ¹Homeless definition paragraph one: (i) those whose primary nighttime residence is not designed as a sleeping accommodation for human beings, (ii) those in shelter, transitional housing, or motels paid for by charitable organizations, and (iii) those exiting institutions after 90 days or less and who were previously homeless;" and
 2. Be referred through Coordinated Assessment.
- The owner/agent will dedicate 9 units to the Continuum of Care.

II. GENERAL ROLES

- The Owner/Agent will systematically alert ECHO of anticipated unit vacancies to be filled by the Continuum of Care, comply with the summary of time limitations outlined below, and comply with attached tenant screening criteria. Details outlined below.
- ECHO will assume responsibility for readying eligible homeless applicants to quickly apply to fill those vacancies and efficiently meet all requirements of the tenant screening and lease up process to the Owner/Agent's satisfaction. Details outlined below. Referred households will have the following characteristics:
 1. Homeless status has been certified
 2. Household matches the property's income, unit size restrictions, etc.
 3. Household has completed Coordinated Assessment
- For each referral, ECHO will identify the household as prioritized through the Coordinated Assessment system; individual household vulnerability and eligibility will be considered as part of the Coordinated Assessment process. ECHO will then pair that household with an appropriate support service program. These are support service programs, not governed by ECHO, that are often positioned to provide short term and/or long term support services to the households during their new tenancy that will promote their stability as tenants. Details outlined below.

¹ *The Homeless Emergency Assistance and Rapid Transition to Housing Act (HEARTH)*; May 20, 2009. The HEARTH Act amends and reauthorizes the McKinney-Vento Homeless Assistance Act .



Memorandum of Understanding (MOU) for Continuum of Care Units

III. RESPONSIBILITIES OF OWNER/AGENT

- Provide ECHO, in a separate email, the following documents at least 30 days prior to the start of application acceptance:
 1. Standard Application
 2. Standard Lease Agreement - including specifications regarding utility payments
 3. List of documents needed for a complete application
 4. Property rules related to smoking, parking, pets, etc.
- Email ECHO point of contact with timely notification of a vacancy that will be assigned as a CoC unit and provide relevant information about the vacant unit.
- Copy assigned support service provider on all communication with a homeless applicant. Note that ECHO will obtain a Release of Information for each household to allow this communication to proceed.
- Whenever possible, accept initial applications by secure email or fax in order to decrease the number of visits the applicant and service provider need to make to the property.
- Screen the batch of up to three referred applicants for eligibility and suitability in the order received from ECHO (i.e. Applicant #1 and Applicant #2).
- Alert ECHO, assigned support service provider, and applicants of any deficiencies in applications.
- Make an eligibility determination within 5 business days whenever possible.
- Ensure a general response time for all communications with the MOU partner of 1-2 business days.

IV. RESPONSIBILITIES OF ECHO

- Provide Owner/Agent with a batch of up to three applicants that meet the property's eligibility criteria within 5 business days of notification from the Owner/Agent of an available CoC unit. If the applicants are rejected or decline an offer of housing, ECHO can refer more applicants if requested by the Owner/Agent. If a suitable applicant is not identified within 30 business days, then the property may revert back to its standing waiting list to fill the vacancy.
- Provide the Owner/Agent with a complete referral package for each referral that includes:
 1. Completed housing application of the Owner/Agent.
 2. Required supporting documentation needed by the Owner/Agent to process applications::
 - a. Picture IDs for all adults
 - b. Income and asset documentation
 3. Verification of homelessness for CoC unit eligibility.
 4. Determination that household is most appropriate as determined by the Austin/Travis County Continuum-of-Care Coordinated Assessment process.

Memorandum of Understanding (MOU) for Continuum of Care Units

5. Release of Information from the referred households to authorize ECHO and the Owner/Agent to share information regarding the households' applications, including third party documents the development receives from doing third party verifications (i.e. bank statements, credit reports, etc).
 6. Contact information for assigned support service provider.
- Support the appropriate support service program in informing the applicants referred that this is only a referral and does not constitute an offer of housing and that the Owner/Agent will confirm eligibility for the housing and conduct a screening that will include a credit check, criminal background check, and landlord history check.
 - Support the appropriate support service program in accompanying the referred applicants for interviews with the Owner/Agent and lease signing at the property if the household needs that support.
 - For each referral, ECHO will identify the household as prioritized through the Coordinated Assessment process; individual household vulnerability and eligibility will be considered as part of the Coordinated Assessment process. ECHO will then pair that household with an appropriate support service program. These are support service programs, not governed or guaranteed by ECHO, that are often positioned to provide short term and/or long term human services to the households during their new tenancy that will promote their stability as new tenants.
 - Ensure a general response time for all communications with the MOU partner of 1-2 business days.
-

Memorandum of Understanding (MOU) for Continuum of Care Units

V. SUMMARY OF TIME LIMITATIONS TO COORDINATION

Party	Step	Time Limitation
Owner/Agent	Email announcement of vacancy to be dedicated to homeless preference	Immediately upon vacancy - or as soon as anticipated
ECHO	Submit up to 3 referrals to fill vacancy in a ranking order for consideration	5 business days
Owner/Agent	Announce eligibility determination	5 business days
ECHO	Second attempt to fill unit before vacancy may go to general waiting list	5 business days
All parties	General response time for all communications between parties	1-2 business days

Memorandum of Understanding (MOU) for Continuum of Care Units

VI. ESTABLISHED POINTS OF CONTACT

ECHO Point of Contact

Name: Bree Williams

Title: Director of Community Housing

Phone: 512-940-9690

Email: breewilliams@austinecho.org

Address:

Website: www.austinecho.org

RHDA Applicant Point of Contact

Name: Madge Whistler

Title: Interim Executive Director

Phone: 512-454-8646

Email: finance@projecttransitions.org

Address: 7101B Woodrow Ave / Austin, TX 78757

Website: projecttransitions.org



Memorandum of Understanding (MOU) for Continuum of Care Units

VII. VACANCY INFORMATION

Vacancy Announcement Email Contents

Property Name: TBD/Burnet Place

Contact Person: TBD/Todd Logan

Phone: TBD/512 454 8646

Email: TBD/tlogan@projecttransitions.org

Date unit will be ready for occupancy: TBD

of Bedrooms: one/studio

Utilities tenant is responsible for: TBD/utilities included in rent

Is this a first floor or elevator unit? TBD

Is this an accessible unit? TBD

Anything else an applicant should know about the unit? TBD



Memorandum of Understanding (MOU) for Continuum of Care Units

VIII. MOU ATTACHMENTS

- RHDA Applicant should attach the following to this MOU:
 1. Rental Application and related document requirements, if available
 2. Standard Lease and utility payment specifications, if available

- ECHO should attach the following to this MOU:
 1. CoC Unit Screening Criteria
 2. Sample Release of Information

Memorandum of Understanding (MOU) for Continuum of Care Units

IX. MOU SIGNATURES

ECHO

Name: *Matthew Mollica*

Title: Executive Director

Phone: *860-287-2587*

Email: *matthewmollica@austinecho.org*

Address: *300 E Highland Mall Blvd Suite 200 Austin, TX 78752*

Website: www.austinecho.org

Signature: *[Handwritten Signature]*

Date: *9/20/19*

RHDA Applicant

Name: Madge Whistler

Title: Interim Executive Director

Phone: 512-454-8646

Email: finance@projecttransitions.org

Address: 7101B Woodrow Ave / Austin, TX 78757

Website: projecttransitions.org

Signature: DocuSigned by: *Madge Whistler*
8D9145F78CC749C...

Date: 9/20/2019



**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4e. Resident Services



Resident Services

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

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

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

Housing Services provided at Burnet Place Apartments include:

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



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

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

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

100% of the clients served by Project Transitions are persons living with HIV/AIDS. Most of these clients were formerly homeless or at-risk of homelessness before accessing PT's services. Burnet Place Apartments proposes to serve 61 households annually; 100% of households will be admitted having income below 200% of the Federal Poverty Guidelines; at least 60% will be persons of color; at least 65% will be persons with a history of mental health or substance abuse issues; and at least 30% of residents will be female.

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

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

iv. External service provider – Texas Health Action

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



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

- Jessica Schrillo - Housing Program Manager
- Guadalupe Barnes - Life Skills Coordinator
- Magdalena Cuevas - Housing Specialist
- Gabriel Sanchez - Housing Specialist

Jessica Schrillo

(She/They)

6713 Panda Royle Dr.
Del Valle, TX 78617
(512) 470-1949
rschrillo@gmail.com

EDUCATION

**Midwestern State University, Wichita Falls, Texas—
Bachelor of Science in Psychology with a minor in Biology**

Graduated December 2018

Relevant Coursework

Human Behavior, Substance use, Health Psychology

EXPERIENCE

Project Transitions, Austin, Texas—Program Manager,

May 2019 - Present

Managed 3 properties with 27 households in the HOPWA TSH program, Performed Maintenance requests, Developed Policies and Procedure, Built and managed a team of 5 staff to operate the program.

Vivent Health, Austin, Texas— Case Manager,

May 2019 - May 2021

Provide homeless prevention and rehousing services to a caseload of 60 clients while providing statistical data to the Department of Housing and Urban Development. Working with a variety of different people to overcome barriers that prevent stable housing.

San Gabriel Crisis Respite, Georgetown, Texas—Residential Specialist,

June 2017 - August 2018

Provide healthy meals and administer medications to up to 12 clients with a variety of presenting mental illnesses. Foster a safe environment for clients, Assist psychologists in treatment plans for clients.

SEEK Camp, Pottsboro, Texas— Counselor

May 2016-Present

Assisting up to 8 Adults with mental disabilities with their daily needs while ensuring they had a fun time at camp.

SKILLS

CPR/BLS,

Customer Service,

IBM-SPSS,

Certifications

Trauma Informed Care,

Transforming Health,

Mental Health First Aid,

AWARDS

Boy Scouts of America

(2007–Present)

Life Scout rank, Order of the Arrow

Wesley Foundation

(2014–present)

Guadalupe Barnes

995 E. Amity Rd.

Salado, TX 76571

Phone: 254-681-9088

Email: barnes1103hhct@gmail.com

Education:

Aug 2015 – 2018

Masters in Social Work – Our Lady of the Lake, University of San Antonio

Completed 500 hours of Social Work Internship at Copperas Cove Nursing Home

Masters in Social Work: Social Work Practice with Hispanic Children, Psychopathology, Social Work Practice with Hispanic Elders, Social Work Practice with Hispanic Youth, Social Work Practice with Hispanic Families, Evaluation Social Work Practice Hispanic Children and Family.

Studied classes for the Bachelor in Social Work, Generalist Social Worker Practice with Individual Families and Groups, Human Behavior Social Environment: Individual and Family, Social Welfare Policy and Services, General Social Work Practice Organization and Communities, Human Behavior and Social Environment: Social System. Social Work Research I, Foundation Field Education I, Foundation Integrative Seminar I, Foundation Field Education II, Foundation Integrative Seminar II, and Foundation Field Education III.

Aug 2011 – May 2015

Bachelors of Science in Liberal Studies – Texas A&M, Central Texas

Studied Social Welfare in America, Intro to social work, methods and skills of Interviewing, Social Work with Diverse Populations, Writing for Social Work Research, Human Behavior and Social Environment II, Biological Foundations of SWK Practice, Human Behavior and Social Environment II, Mental Health and Social Work. Participated in 30hr of volunteer placement. Intro to criminal Justice, Juvenile Delinquency.

Aug 2002 – Aug 2005

Associates in General Studies – Social Work and Criminal Justice

Guadalupe Barnes

Work Experience:

March 2019 –June
30, 2020

Qualified Mental Health Professional- Master Social Work case worker for Mental health clients. Hillsboro TX

Hill County Mental Health Mental Retardation

Provide direct and indirect service to each consumer on an average of three hours a month. Enhanced clients functioning within the community setting by linking to necessary services, provided support to consumers and their family through the treatment planning process. Planned Treatment Plans that outlined client objectives and skills training interventions and revised objectives when necessary to meet client needs. Wrote case notes and reviewed quarterly progress. Assisted with Psychiatric medication review with clients. Assisted with group counseling.

Jan 2017 – March
2019

Empowerment Program Manager/Case Manager – Full Time Non-Federal
Killeen, TX

Heritage House of Central Texas

Empowerment Program Manager, Case Manager, and Supervised Bachelor Social Work Interns, assist clients who are homeless or at risk of homelessness. Assist in finding appropriate social services, assist client with finding jobs, with updating and creating new resumes, provide information for new training, and budgeting. Assisting in finding health care, mental health care, and assist in filling out social services application. Advocate for clients with disability for rental and with new jobs. Assist clients with drug addiction by find them proper drug treatment. Maintain professional working rapport with social services assisting the homeless population in the area. Employed three days/ fifteen hours a week.

***Masters of Social Work Internship**

Copperas Cove Nursing Home

Assessed residents by completing Brief Interview for Mental Status (BIMS), Advocated daily on behalf of all residents to ensure their rights are maintained, assist supervising Social worker in completing Advance Directives, Medical Power of Attorney, Out of Hospital Do Not Resuscitate documents. Assist in filling out referrals to ancillary services provided by the nursing home such as Optometry, Audiology, Dental, Podiatry, Counseling, Psychiatry, and Psychological testing on the behalf of the residents. Observed and assisted supervised Social Worker with preparing care plan to assess change and areas of need since their last care plan. Observed and assisted Supervising Social Worker in keeping track of Grievance Report and in assisting in maintaining the facility Monthly Grievance Log. Assisted with room changes and assisted in assessing the residents change of room.

May 2018 – Aug
2017

Empowerment Program Manager/Case Manager – Full Time Non-Federal
Killeen, TX

Guadalupe Barnes

*Bachelors in Social Work Internship

The Heritage House of Central Texas

Internship at the Heritage House, assessed and assisted client who are homeless, finding jobs, building resumes, searching for social services, housing, mental health care, medical care, and daycare for their children. Providing referrals to area agency.

Food Bank and Woman in Domestic Violence (Volunteered)

Volunteer in the community by assisting with helping the elderly during the weekend. Driving elderly to hospitals during their illness and hospital stays. Provide rides to store, pay bills, doctor appointments, and leisure time. Provided respite for families who needed a break.

May 2001 – May
2015

Home Health Care Assistance – Full Time Non-Federal Killeen, TX

Provided care to individuals with disability. Worked with older adults who needed home health care in their home. Drove clients to doctor, stores, and personal travel. Provided therapy and kept a log of medication. Worked with clients who were struggling with organization and hygiene issues.

Oct 1997 – Oct
2001

United States Army, (77F) – Petroleum Supply Specialist Fort Lewis, Washington

Supplied petroleum to field site during Army training. Issue and dispensed bulk fuels during training. Provided water storage and distribution facilities to using units in field problems. Operated equipment used with petroleum and water distribution system and multiproduct pipeline system.

Unit Armor – Responsible for the accountability and maintenance of over \$1 million worth of weapons. Provided quarterly instruction on proper care and maintenance of all assigned small-arms; maintained hand-receipts for equipment issued locally, in the field or detachment; calibrated, zeros, and performed user maintenance of small-arms; identified failures and arranged higher level maintenance.

1st Sergeant driver – Drove 1SGT in the field during day and night training. Drove to and from the field to complete company checks and provide transport to sick troops to sick call. Edited NCOER's for Battalion and worked for Battalions mail.

Gabriel Sanchez

Phone: (510) 561-8687

sanchezgabriel76@gmail.com

Skills

- ❖ Proficient with Microsoft Office Suite
- ❖ Effective Coaching Skills
- ❖ Trauma Informed Care
- ❖ Bilingual in Spanish
- ❖ Basic Budgeting
- ❖ Efficient Time Management Skills
- ❖ Attentive to Detail
- ❖ Effective Communication
- ❖ Mandated Reporting

Experience

Hamilton Families- San Francisco , CA

Housing Stability Specialist

08/2021-5/2022

03/2018-05/2020

- Case managed new and existing families entering the Rapid Re-housing program
- Searched and located local non-profit services to assist families with their new community
- Case-noted interactions
- Attended monthly meetings with CalWORKs staff for updates to program requirements
- Utilized SMART goals in order to help family with long term housing/employment goals
- Assisted clients with job search and resume building skills-provided job leads
- Entered required information on the SF ONE System portal in a timely manner
- Knowledgeable with local and federally funded job and housing programs - CalWORKs, HUD & WIOA
- Completed mandated home visits with families on a quarterly and as-needed basis
- Ensured families were meeting monthly and quarterly goals per program requirements
- Assisted families to meet their housing stability goals by promoting self-sufficiency values
- Maintained client confidentiality - HIPPA requirements
-

California Human Development- Napa, CA

Case Manager- Farmworker Services

05/2017- 03/2018

- Enroll low income and at-risk participants for Adult Workforce Farmworker Services
- Calculated income to qualify new participants in the intake phase of the program
- Managed an active caseload of 35 participants
- Provided supportive services on an as-needed basis utilizing state and federal guidelines
- Maintained precise and accurate documentation of case management services

Youth Policy Institute- Pacoima, CA

Employment Assessment Counselor

08/2015 - 06/2016

- Provided active participants with job leads classroom training and vocational education
- Provided supportive services on an as-needed basis and community-based referrals when requested
- Entered personal customer data into the Jobs LA database ensuring privacy was a top priority

Community Service and Employment Training -Visalia, CA

Sr. Program Specialist

04/2009 - 08/2013

- Interviewed customers to determine eligibility for multiple programs according to agency rules and guidelines
- Managed a caseload of 75-80 active customers
- Calculate household income to determine eligibility

Education - Dinuba High School

Diploma

Magdalena Cuevas

Community Liaison

Georgetown, TX 78626

magdalenamaggielopez7_ncx@indeedemail.com

+1 254 383 7605

Bilingual Community Liaison and Bilingual ELR Early Learning Readiness Program Teacher

Willing to relocate to: Round Rock, TX - Pflugerville, TX - Georgetown, TX

Authorized to work in the US for any employer

Work Experience

Community Liaison

State of Texas - Austin, TX

October 2019 to Present

- Assist potential families in completing paperwork
- Complete walk-through s of all potential foster homes as a part of the home study process
- Meet face-to-face with all potential foster parents at least 1 X during the home assessment process
- Participate in all staff meetings, training's and team interactions as scheduled
- Ensure that foster development services meet State licensing, program and contract standards
- Ensures that foster Parents are adequately skilled and motivated to implement a comprehensive treatment Parent Model
- Ensures foster care records contain appropriate documentation, provides liaison with referral sources, providers and consultants
- Responsible for development and certification of foster parents

Bilingual Preschool Teacher-ELR Early Learning Readiness

YMCA

August 2019 to February 2020

- Empower caregivers (moms, dads, grandparents, neighbors, nannies, etc.) and the children they care for with the tools they will need to achieve school readiness
- Strive to provide children ages 2-4 years old from low-income communities with an enriching learning environment
- Offer program sessions that last 15 weeks and are offered in both the fall (August-December) and the spring (January-May)
- Conduct class two to three times a week, for two hours each day at locations in North Austin, East-Central Austin, South Austin, and Manor
- Work directly with caregivers and their children to help caregivers understand the important role they play in their child's development and school success
- Promote and create a stimulating classroom environment that helps develop physical, verbal, and social skills children need
- Facilitate sessions two to three times a week using the program curriculum provided
- Motivate and connect with all program participants

Senior IT Professional I - LMS Administrator

Texas A&M University-Central Texas

November 2017 to April 2019

- Work alongside team of Technology Enhanced Learning and Instructional Designers in developing a new LMS and client Learning Program Owners (Catalog) to interpret requirements and translate those requirements into a workable framework of programs on the client LMS (Continuing Education)
- Manage ticketing systems and assign to accurate department and managers
- Work alongside team of Instructional Designers in developing a new LMS and client Learning Program Owners (Catalog) to interpret requirements and translate those requirements into a workable framework of programs on the client LMS (Continuing Education)
- Provide the client Program Owners (TAMUCT) with guidance to support the consistent delivery of learning programs through the LMS and promote its use as the primary platform for delivering learning across the organization
- Performs the upload of LTI's and performs testing to ensure programs function properly once launched for learning programs ranging from simple to complex
- Performs ongoing maintenance to existing programs, and retiring of programs which have been deprecated
- Advises the client on general approach for managing the LMS, including things like deploying the system to new audiences, or implementing new company wide features
- Collaborate / participate in user acceptance testing for implementation of learning objects, as well as develop test cases with users, and cross functional teams
- Monitors learner inquiries regarding either specific learning programs or general LMS questions, and either responds to resolve the inquiry or routes them to the appropriate point of contact
- Develops a deep understanding of client learning programs and builds relationships with clients to serve as a primary point of contact for LMS related questions and requests

Staff Technician

Texas A&M University-Central Texas

November 2016 to November 2017

- Monitor university computer lab operations during normal lab hours
- Provide first tier software and hardware technical support for students, faculty, and staff in computer labs, classrooms, and over the phone
- Perform installations and minor maintenance on computer hardware, packaged software, and audio-visual equipment
- Open computer labs and perform routine cleaning, computer boots, restarts, and ensure that the computer labs are ready for normal operations
- Close, shut down computer systems, clean and secure the computer lab at the end of the day
- Process customer computer and audio-visual equipment needs and perform equipment checkout and turn-in processing
- Occasionally act as first point of contact for emergency services during non-business hours while labs are open, and contact appropriate support personnel dependent on situation
- Perform other tasks as required by full-time Academic Technology personnel
- Manage and create Staff Technicians semester schedules
- Provide administrator and end-user training on Academic Technology- related system
- Assisted director in scheduling lab technicians working hours

Bilingual Customer Service Representative

Blackboard Student Services

July 2015 to May 2017

Resolve end user inquiries by utilizing multiple technologies including telephony and web based inquiries

- Strive for one-call resolution of customer issues
- Communicating appropriate options in a timely and professional manner
- Document information into web based ticketing system
- Search and navigate knowledge base to identify appropriate resolution for client issues
- Escalate unique issues or inaccurate information contained in knowledge base to the immediate supervisor for resolution
- Projects favorable image of company to promote its objectives and goals
- Participate in internal training programs to expand knowledge and support with clients

Education

Master's Degree in Education Specialization in Curriculum and Instruction in Education Specialization

Houston Baptist University - Houston, TX

May 2018

Bachelor's Degree In Liberal Studies in Liberal Studies

Texas A&M University Central Texas - Killeen, TX

August 2014

Associate Degree in Business Administration in Business Administration

Central Texas College - Killeen, TX

May 2012

Skills

- CPR
- training
- Microsoft Excel
- Organizational Skills
- Microsoft Office
- Filing
- Management
- Front Desk
- English
- Inventory
- Scheduling
- problem solving
- Bilingual Spanish (10+ years)
- Telephony

- Active Directory
- Spanish
- Microsoft Word

Certifications and Licenses

First Aid Certification

CPR Certification

Assessments

Data Entry: Accuracy — Proficient

July 2019

Entering data quickly and accurately.

Full results: Proficient

Written Communication — Proficient

June 2019

Measures a candidate's ability to convey written information using proper grammar rules.

Full results: Proficient

Work Style: Reliability — Proficient

June 2019

Tendency to be dependable and come to work

Full results: Proficient

Work Style: Conscientiousness — Proficient

October 2019

Tendency to be well-organized, rule-abiding, and hard-working.

Full results: Proficient

Indeed Assessments provides skills tests that are not indicative of a license or certification, or continued development in any professional field.

Social Services Proforma

The goal of Burnet Place Apartments is to serve persons living with HIV/AIDS – many who will need intensive, wrap-around supportive services to stabilize. The supportive service budget was developed to achieve this goal from Project Transitions’ years of experience administering Supportive Housing for persons living with HIV/AIDS in Austin.

In 2019, 55% of Project Transitions’ gross funding came from their Top Drawer Thrift Store operations (27%), fundraising events (15%), private grants (8%), and individual contributions (5%.)

Thrift Shop Operations	\$450k
Fundraising Events	\$255k
Private Grants	\$130k
Individual Donations	\$77k

The top fundraising contributions include Hill Country Ride for AIDS, Snow Ball, and Guess Who’s Coming to Dinner?

The top private grants include Religious Coalition to Support the Homeless, Austin Community Foundation, Lola Wright Foundation, Runnels Foundation, Broadway Cares, H-E-B, and BBVA.

Individual donations are realized throughout the year through printed newsletter solicitations, Amplify Austin, End-of-Year campaign and other activities.

Supportive Service Budget**Burnet Place Apartments**

<u>Sources</u>	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Total</u>
HOPWA (Housing Opportunities for People with HIV/AIDS) Private Fundraising - Grants (In 2018, PT raised \$67,000 in private grants: Moody Foundation, Shield Ayres and HEB)	\$291,187	\$299,922	\$308,919	\$900,028
Private Fundraising - Individual Donors (Hill Country Ride for AIDS, SnowBall and Guess Who's Coming to Dinner?)	\$10,150	\$10,455	\$10,769	\$31,374
Thrift Store Revenue (In 2018, PT raised \$430,000 from Top Drawer thrift store sales)	\$9,900	\$10,197	\$10,503	\$30,600
	\$22,654	\$23,334	\$24,034	\$70,022
TOTAL SOURCES	\$333,891	\$343,908	\$354,225	\$1,032,024

<u>Uses</u>				
Program Management Salary - 0.4 FTE	\$26,000	\$26,780	\$27,583	\$80,363
Supportive Services Social Workers Salary - 2.75 FTE	\$123,750	\$127,463	\$131,286	\$382,499
24-Hour Desk Clerks	\$93,600	\$96,408	\$99,300	\$289,308
Payroll Taxes	\$18,616	\$19,175	\$19,750	\$57,541
Worker's Comp	\$2,100	\$2,163	\$2,228	\$6,491
Health Insurance	\$55,350	\$57,011	\$58,721	\$171,081
Communications (telephone/internet)	\$4,200	\$4,326	\$4,456	\$12,982
Supplies/Printing	\$2,500	\$2,575	\$2,652	\$7,727
Training/Travel/Mileage	\$2,000	\$2,060	\$2,122	\$6,182
Direct Aid - Food and Commodities	\$5,775	\$5,948	\$6,126	\$17,849
TOTAL	\$333,891	\$343,908	\$354,225	\$1,032,024

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5a. Appraisal

Appraisal

Project Transitions, Inc. purchased the development site for Burnet Place Apartments on September 27, 2019 for \$2,900,000. Per the Travis Central Appraisal District, the property was valued at \$3,574,500 in 2022.

The project has been underwritten by the City of Austin and the Texas Department of Housing and Community Affairs, without an appraisal.

GENERAL INFO

ACCOUNT

Property ID: 242406
 Geographic ID: 0239061008
 Type: R
 Zoning: CS1; GR
 Agent:
 Legal Description: LOT 7 BLK H ALLANDALE NORTH SEC 8
 Property Use: 89ALC

OWNER

Name: PROJECT TRANSITIONS INC
 Secondary Name:
 Mailing Address: PO BOX 4826 AUSTIN TX 78765-4826
 Owner ID: 207314
 % Ownership: 100.00
 Exemptions: EX-XV - Other Exemptions (including

LOCATION

Address: 8007 BURNET RD TX 78757

Market Area:
 Market Area CD:
 Map ID: 023401

PROTEST

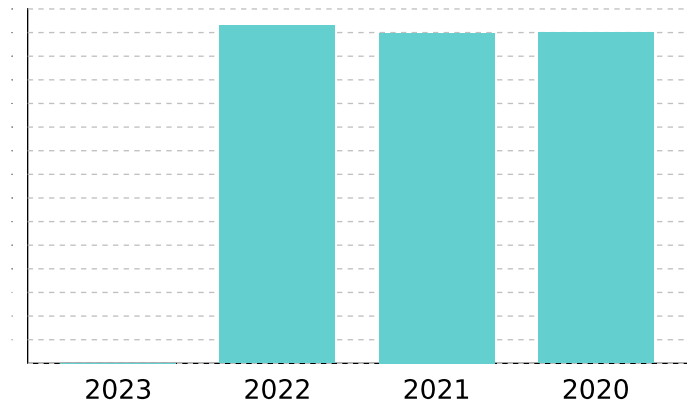
Protest Status:
 Informal Date:
 Formal Date:

VALUES

CURRENT VALUES

Land Homesite: \$0
 Land Non-Homesite: \$3,574,500
 Special Use Land Market: \$0
 Total Land: \$3,574,500
 Improvement Homesite: \$0
 Improvement Non-Homesite: \$0
 Total Improvement: \$0
 Market: \$3,574,500
 Special Use Exclusion (-): \$0
 Appraised: \$3,574,500
 Value Limitation Adjustment (-): \$0
 Net Appraised: \$3,574,500

VALUE HISTORY



Values for the current year are preliminary and are subject to change.

VALUE HISTORY

Year	Land Market	Improvement	Special Use Exclusion	Appraised	Value Limitation Adj (-)	Net Appraised
2023	N/A	N/A	N/A	N/A	N/A	N/A
2022	\$3,574,500	\$0	\$0	\$3,574,500	\$0	\$3,574,500
2021	\$3,097,900	\$400,739	\$0	\$3,498,639	\$0	\$3,498,639
2020	\$3,097,900	\$403,417	\$0	\$3,501,317	\$0	\$3,501,317

TAXING UNITS

Unit	Description	Tax Rate	Net Appraised	Taxable Value
01	AUSTIN ISD	0.996600	\$3,574,500	\$0
02	CITY OF AUSTIN	0.462700	\$3,574,500	\$0
03	TRAVIS COUNTY	0.318239	\$3,574,500	\$0
0A	TRAVIS CENTRAL APP DIST	0.000000	\$3,574,500	\$0
2J	TRAVIS COUNTY HEALTHCARE DISTRICT	0.098684	\$3,574,500	\$0
68	AUSTIN COMM COLL DIST	0.098700	\$3,574,500	\$0

DO NOT PAY FROM THIS ESTIMATE. This is only an estimate provided for informational purposes and may not include any special assessments that may also be collected. Please contact the tax office for actual amounts.

IMPROVEMENT

LAND

Land	Description	Acres	SQFT	Cost per SQFT	Market Value	Special Use Value
LAND	Land	1.0941	47,660	\$75.00	\$3,574,500	\$0

DEED HISTORY

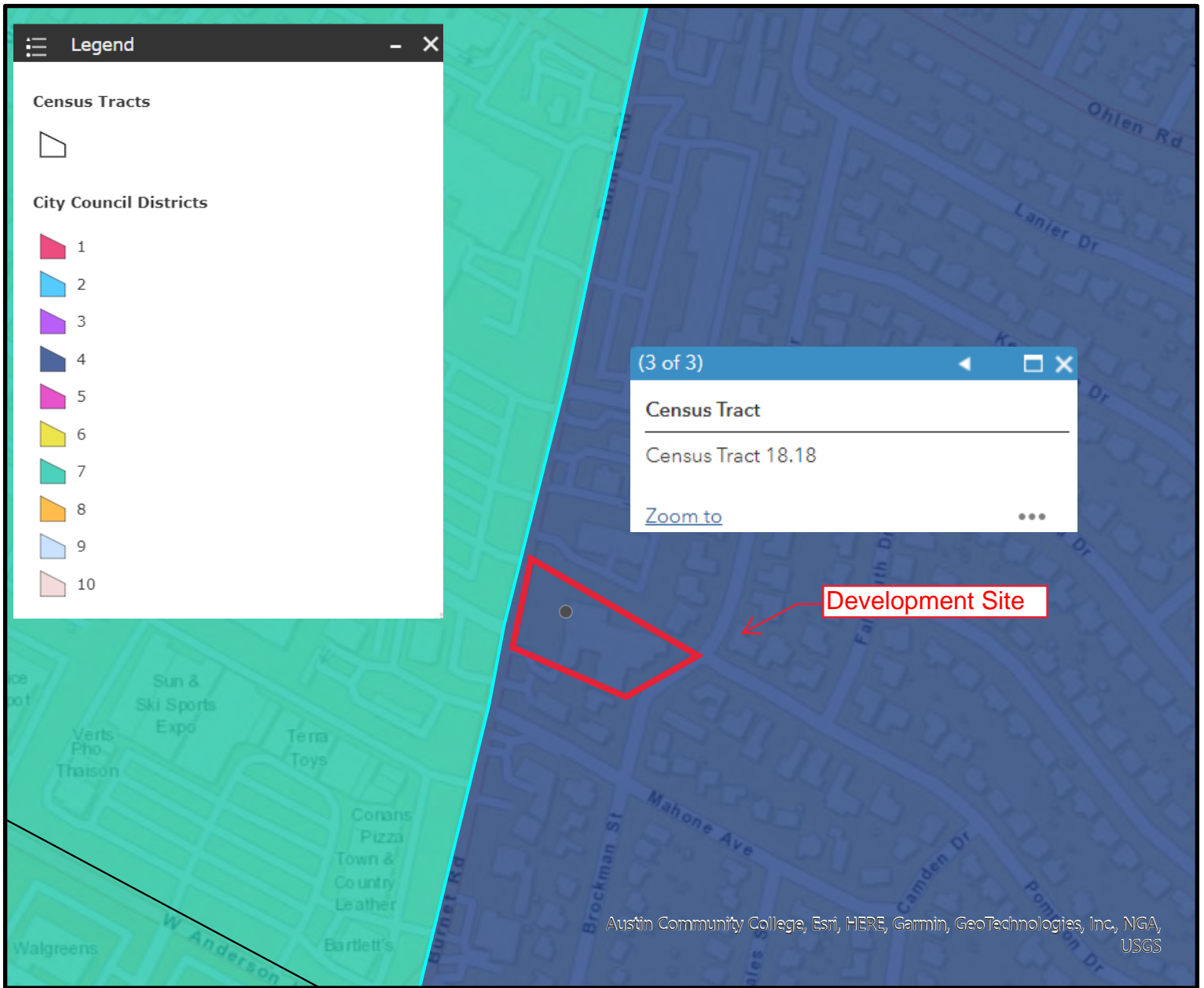
Deed Date	Type	Description	Grantor/Seller	Grantee/Buyer	Book ID	Volume	Page	Instrument
9/27/19	SW	SPECIAL WARRANTY	8007 BURNET HOLDINGS LLC	PROJECT TRANSITIONS INC				2019151556
7/7/15	SW	SPECIAL WARRANTY	BR-T PROPERTIES L P	8007 BURNET HOLDINGS LLC				2015108208
1/1/04	AD	ASSUMPTION DEED	NOBLE RICHARD G	BR-T PROPERTIES L P		00000	00000	2004059065 TR
10/10/03	SW	SPECIAL WARRANTY	OYSTER INVESTMENT	NOBLE RICHARD G		00000	00000	2003247566 TR
2/10/03	SW	SPECIAL WARRANTY	LIVING CENTERS OF TEXAS INC	OYSTER INVESTMENT		00000	00000	2003183804 TR
2/1/93	WD	WARRANTY DEED	KNIGHTSWOOD CORPORATION	LIVING CENTERS OF TEXAS INC		11867	00787	
4/16/90	WD	WARRANTY DEED	BROWN CHARLES & INEZ	KNIGHTSWOOD CORPORATION		11173	00910	
12/6/84	WD	WARRANTY DEED	QUALITY CARE INC	BROWN CHARLES & INEZ		08932	00160	
	WD	WARRANTY DEED		QUALITY CARE INC		00000	00000	

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5b. Property Maps



Property Label

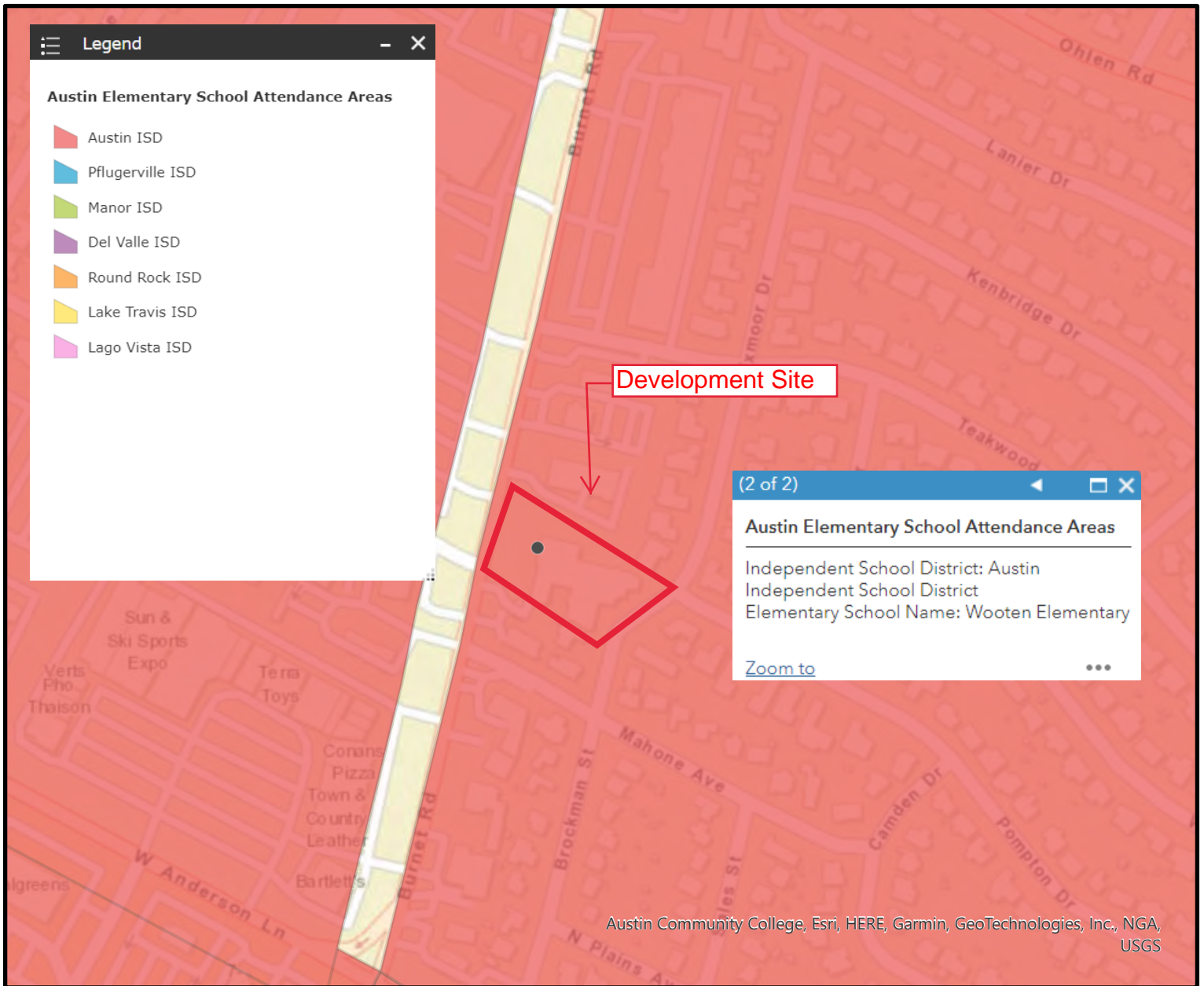
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- Managing Agency: Managing Label
- Address: Address Label
- Land Attributes: Land Label
- ORES Management ID: ORES ID Label
- ORES File Number: ORES File Label
- Restrictions: Restrictions Label
- Restrictions & Protection Comments: Comments Label

- Land Classification: Classification Label
- Land Category: Land Category Label
- Approximate Acreage: Acreage Label
- Appraisal District: Appraisal Label
- Appraisal District Property ID: Property ID Label
- Maximo Asset Tracking Number: Maximo Label



This product is for informational purposes and may not have been prepared for or be suitable for legal, engineering, or surveying purposes. It does not represent an on-the-ground survey and represents only the approximate relative location of property boundaries. This product has been produced by the City of Austin for the sole purpose of geographic reference. No warranty is made by the City of Austin regarding specific accuracy or completeness.





Property Label

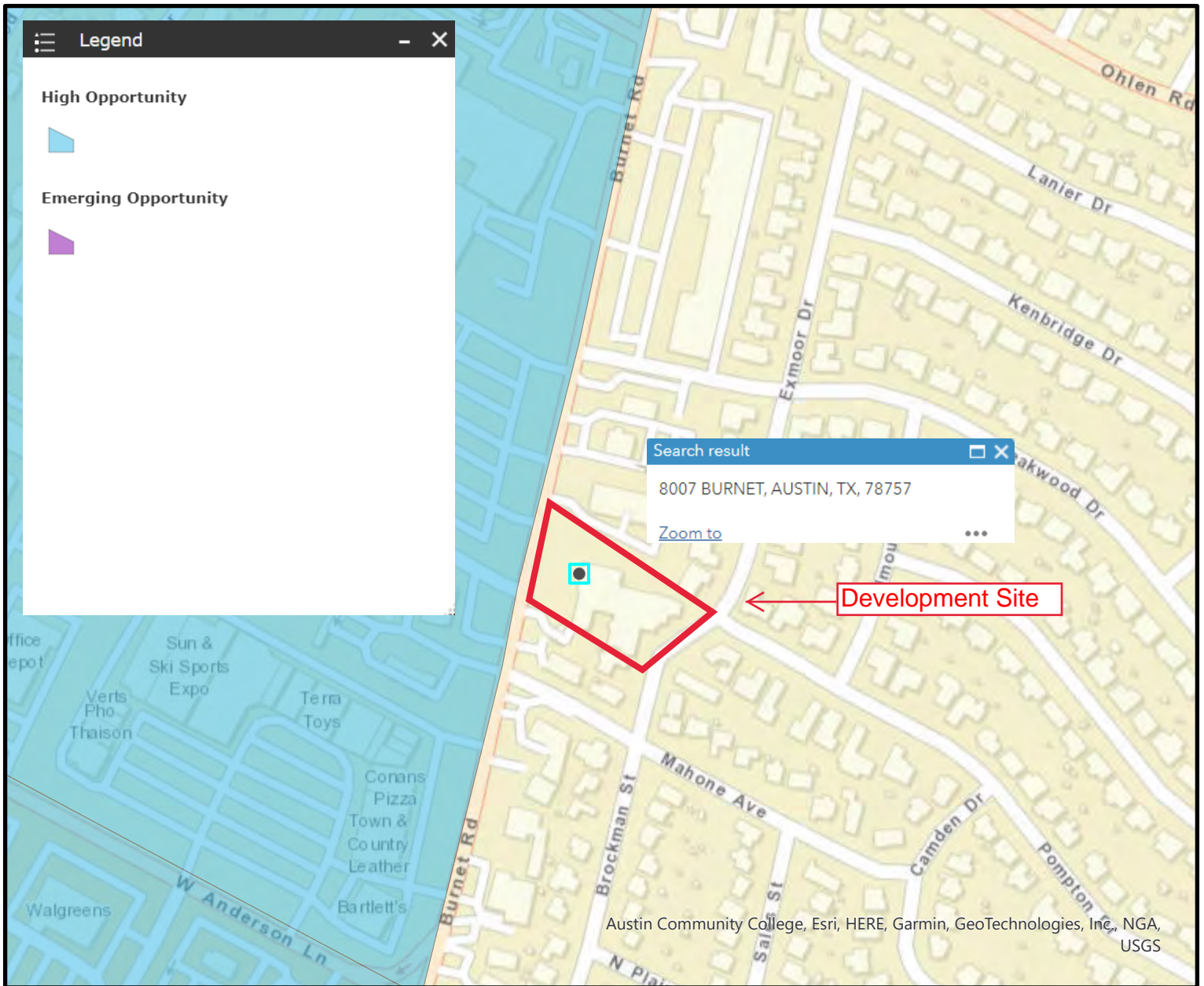
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Property Label

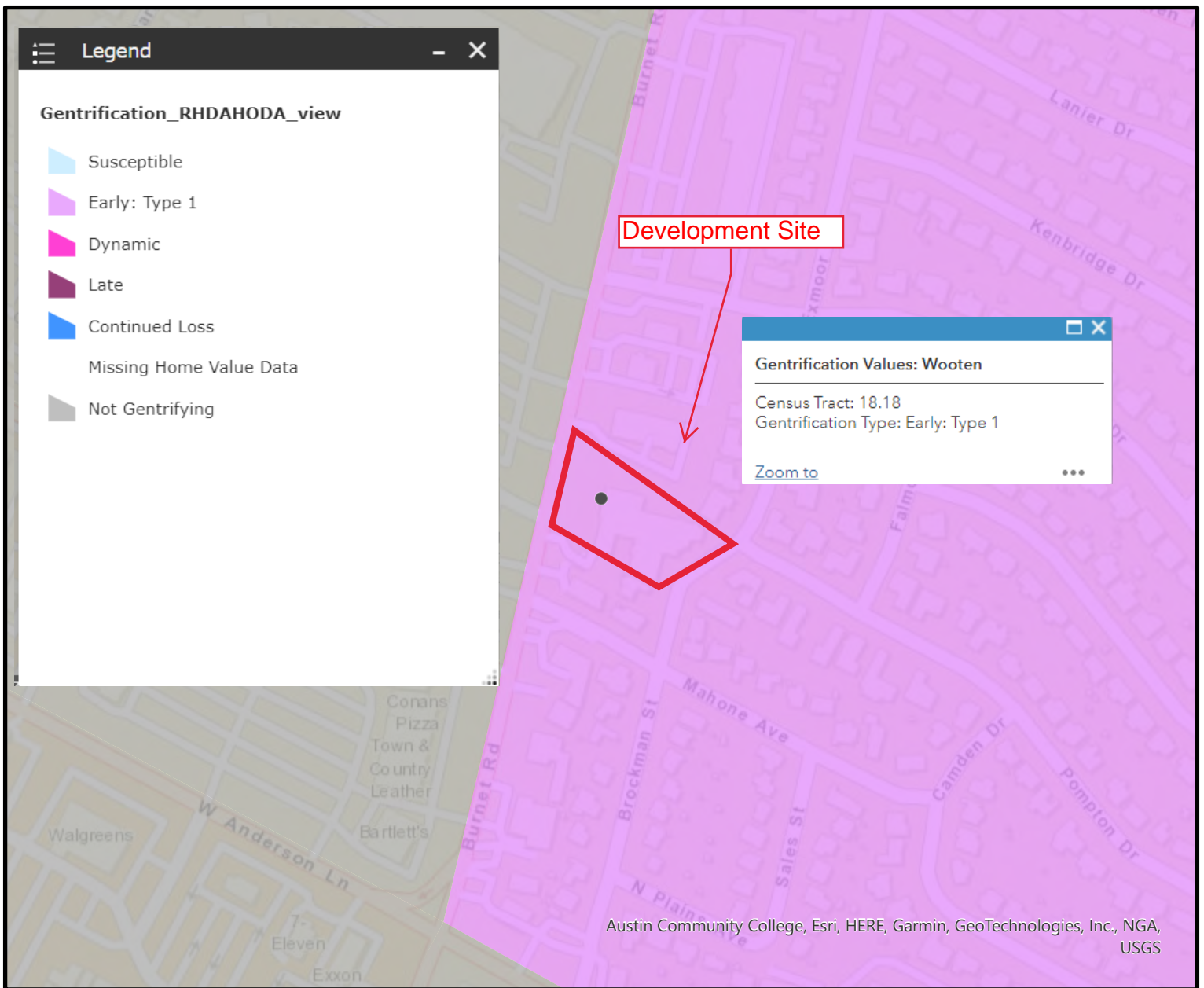
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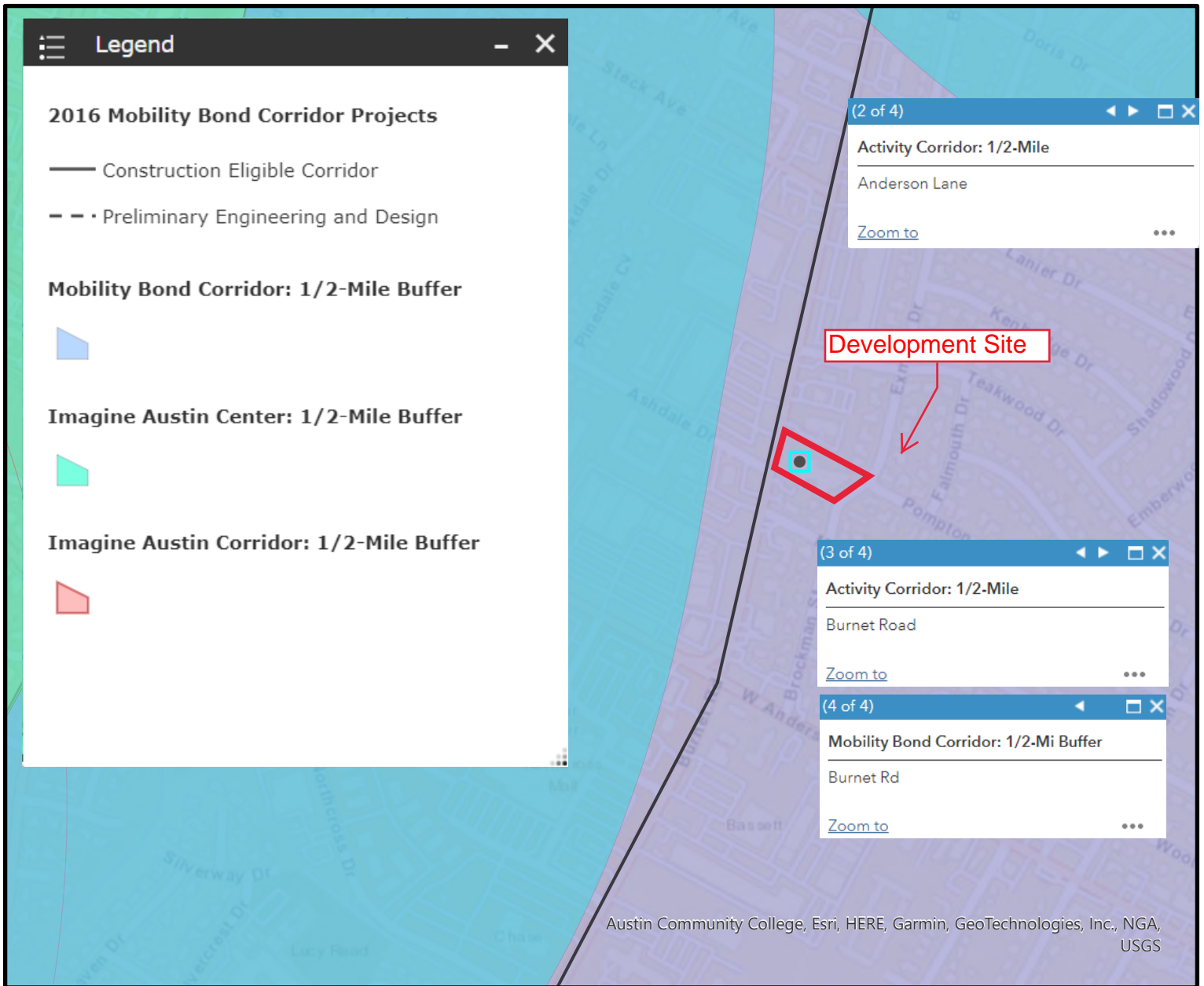
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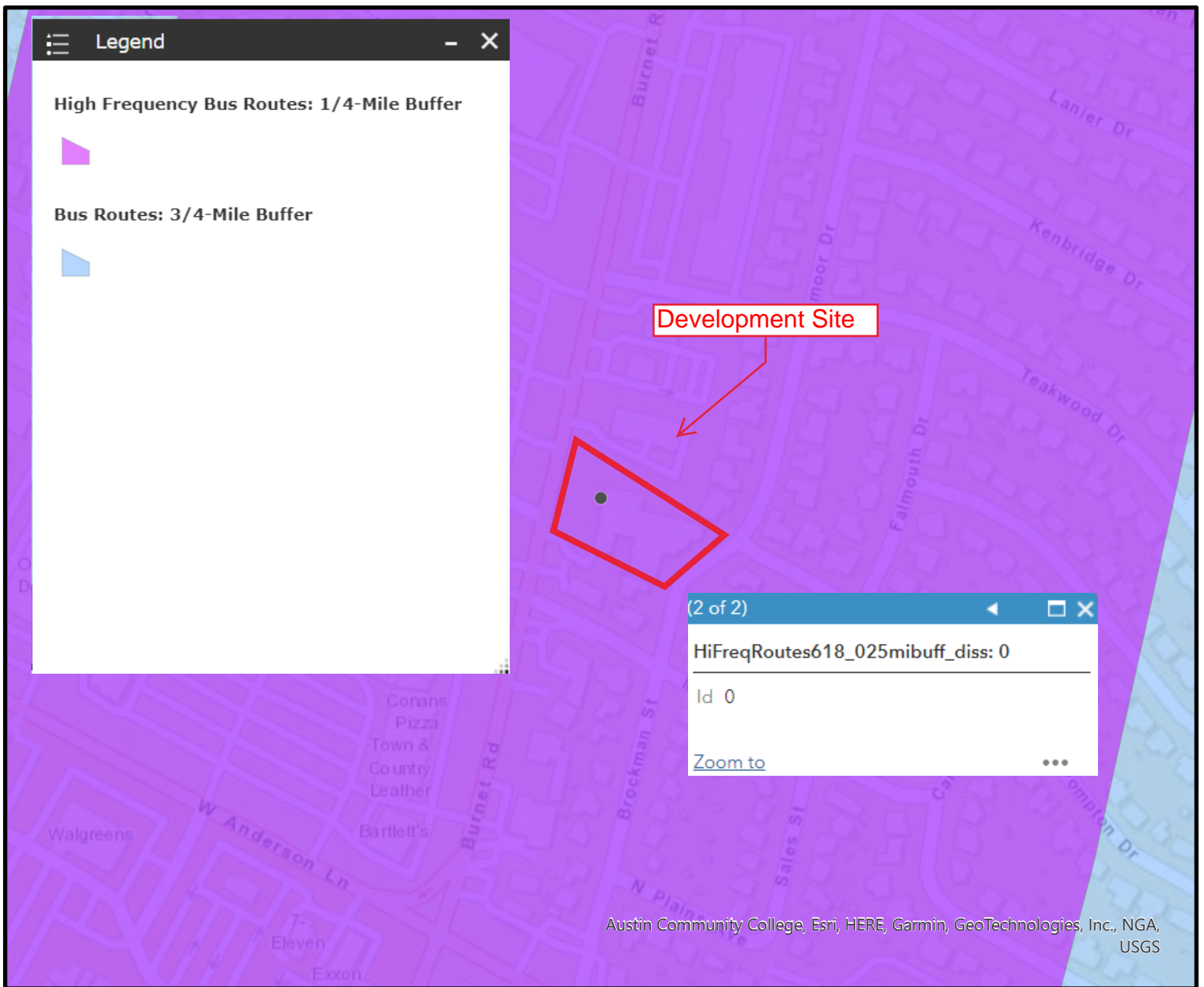
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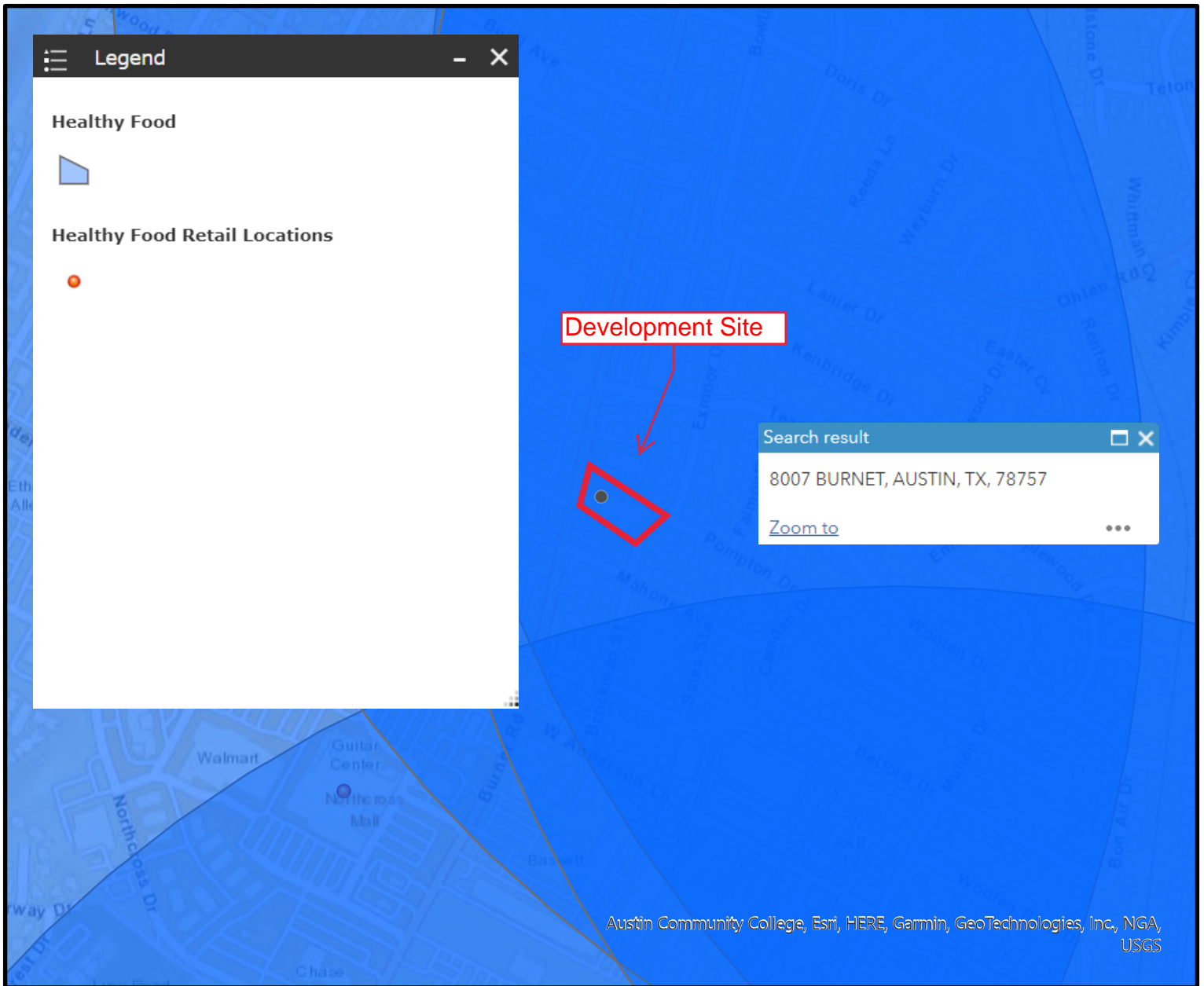
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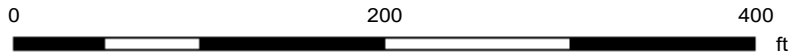
FEMA Floodplains



Legend

Aerial

- Red: Band_1
- Green: Band_2
- Blue: Band_3



Monday, October 24,
2022



The City of Austin Watershed Protection Department produced this product for informational purposes. It is not intended for or suitable for legal, engineering, or surveying purposes. It does not represent an on-the-ground survey and represents only the approximate relative locations of property boundaries. No warranty is made by the City of Austin regarding specific accuracy or completeness. Final determination of the floodplain status for a property must be based on a topographic survey by a Texas registered professional. For regulatory purposes, 100-Year floodplain elevations must be determined from an engineering model created in accordance with the Drainage Criteria Manual and approved by the City of Austin.

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5c. Zoning Verification Letter

Evidence of Zoning

Burnet Place Apartments is certified as a Type 2 development under Affordability Unlocked – an amendment to the City of Austin’s Land Development Code that went into effect on May 20, 2019. Affordability Unlocked allows for development bonuses in exchange for providing affordable housing as required by the amendment. An Affordability Unlocked certified project receives a height bonus and is not required to comply with compatibility standards (except side setbacks per zoning district), maximum floor-to-area ratio, minimum site area requirements, or parking requirements other than accessible parking that would normally be required by code. As long as a project is located in an acceptable zoning district per the Ordinance and certified under the Affordability Unlocked program, the project can be developed with the bonuses described without necessitating a zoning change. Burnet Place Apartments will provide 15 total parking spaces with 4 of those spaces being accessible and one of those accessible spaces being van accessible, as allowed by the Affordability Unlocked ordinance.



City of Austin

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

Neighborhood Housing and Community Development Department

July 10, 2020

Jennifer Hicks
True Casa Consulting, LLC
3000 Skylark Drive
Austin, TX 78757

Re: Zoning Verification for the Property located at 8007 Burnet Road, Austin, Travis County, Texas more particularly described as LOT 7, Block H, of ALLANDALE NORTH SECTION EIGHT, a subdivision in Travis County, Texas, according to the map or plat of record in Volume 58, Page 53, of the Plat Records of Travis County, Texas.

Dear Ms. Hicks:

This letter is to confirm that the property located at 8007 Burnet Road, Austin, Texas is zoned GR-MU-NP, SF-3-NP.

Under the GR-MU-NP, SF-3-NP classification applicable to this property, multi-family residential development is not permitted; however, this site has applied for Affordability Unlocked – a residential affordable housing development bonus program passed by Ordinance No. 20190509-027 – which allows a qualifying development as a permitted use in a commercial base zoning district such as GR or SF-3. A qualifying development is not required to comply with compatibility standards (except side setbacks per zoning district), maximum floor-to-area ratio, minimum site area requirements, or parking requirements other than accessible parking that would normally be required by code. Height bonuses are allocated based on the level of affordability.

Neighborhood Housing and Community Development (NHCD) has issued an Affordability Unlocked Development Bonus Certification as a Type 2 development under Affordability Unlocked that enables the development of the site as multifamily housing with the bonuses described above.

Sincerely,

Alex Radtke

Alex Radtke, Senior Planner
Neighborhood Housing and Community Development

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5d. Proof of Site Control

Evidence of Site Control

Project Transitions, Inc. closed on the purchase of the Development site for Burnet Place Apartments on 9/27/2019.

Please find attached the following documents to evidence site control:

- Warranty Deed
- Settlement Statement
- Addendum to Closing Statement signed by both parties

WE CERTIFY THAT THIS IS A TRUE
AND CORRECT COPY OF THE ORIGINAL
EXECUTED ON THE DATES AND BY THE
PARTIES SHOWN HEREON.

Special Warranty Deed with Vendor's Lien

Notice of confidentiality rights: If you are a natural person, you may remove or strike any or all of the following information from any instrument that transfers an interest in real property before it is filed for record in the public records: your Social Security number or your driver's license number.

Date: September 27th, 2019

Grantor: 8007 Burnet Holdings, LLC

Grantor's Mailing Address: 122 Adelphi Street, Apt. 10
Brooklyn, New York 11205-3082

Grantee: Project Transitions, Inc., a Texas Non-Profit Corporation

Grantee's Mailing Address: P.O. Box 4826
Austin, Texas 78765

Consideration: Cash and a note of even date executed by Grantee and payable to the order of Austin Housing Finance Corporation (hereinafter "Lender") in the principal amount of Two Million Nine Hundred One Thousand Nine Hundred Ninety-Two and No/100 DOLLARS (\$2,901,992.00). The note is secured by a first and superior vendor's lien and superior title retained in this deed for the benefit of said Lender and the same are hereby transferred and assigned to said Lender and by a first-lien deed of trust of even date from Grantee to Rosie Truelove, trustee.

Property (including any improvements):

Lot 7, Block H, of ALLANDALE NORTH SECTION EIGHT, a subdivision in Travis County, Texas, according to the map or plat of record in Volume 58, Page 53, of the Plat Records of Travis County, Texas.

Reservations from Conveyance: None

Exceptions to Conveyance and Warranty:

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

This conveyance is made and accepted subject to all restrictions, covenants, conditions, rights-of-way, assessments, outstanding royalty and mineral reservations and easements, if any, affecting the above described property that are valid, existing and properly of record, as reflected by the records of the County Clerk of the aforesaid County, and subject further to the taxes for the year 2019 and subsequent years.

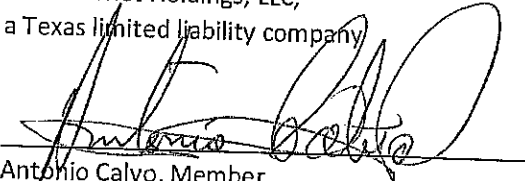
36-T-116444/MLF

Recorded By Texas National Title

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

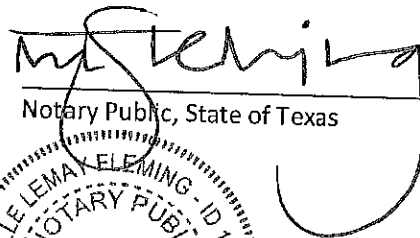
When the context requires, singular nouns and pronouns include the plural.

8007 Burnet Holdings, LLC,
a Texas limited liability company

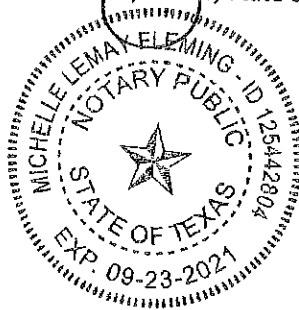

Antonio Calvo, Member

STATE OF TEXAS)
COUNTY OF Travis)

This instrument was acknowledged before me on September 27th, 2019, by Antonio Calvo, as Member, of 8007 Burnet Holdings, LLC, a Texas limited liability company, on behalf of said entity.


Notary Public, State of Texas

Return to:
P.O. Box 4826
Austin, TX
78765



PLEASE PRINT THAT THIS IS A TRUE
 CORRECT COPY OF THE ORIGINAL
 DATED ON THE DATES AND BY THE
 PARTIES SHOWN HEREON.

Texas National Title, Inc.
 721 Highway 290 West, Suite 200
 Dripping Springs, TX 78620
 (512) 337-0940

File Number: T-116444
 Loan Amount: \$2,901,922.00
 Sales Price: \$2,900,000.00
 Close Date: 9/27/2019
 Disbursement Date: 9/27/2019

BUYER(S) CLOSING STATEMENT

Type: Sale
 Property: 8007 BURNET ROAD
 AUSTIN, TX 78757 (TRAVIS)
 (242406)

Buyer(s): PROJECT TRANSITIONS INC (A TEXAS NON-PROFIT CORPORATION), ASSIGNS OR
 AFFILIATES
 7101 Woodrow Ave.
 Austin, TX 78757

Lender: Austin Housing Finance Corporation
 P.O. Box 1088, 7867

Legal Desc: Lot 7, Block H, of ALLANDALE NORTH SECTION EIGHT, a subdivision in Travis County, Texas, according to the map or
 plat of record in Volume 58, Page 53, of the Plat Records of Travis County, Texas.


Description	P.O.C.	Debit	Credit
Deposits, Credits, Debits			
Contract sales price		\$2,900,000.00	
Deposit or Earnest Money from Texas National Title, Inc.			\$60,000.00
Release of Earnest Money 4/1 to 8007 Burnet Holdings, LLC, A Texas limited liability company		\$10,000.00	
Partial Release of Earnest Money 4/30 to 8007 Burnet Holdings, LLC, A Texas limited liability company		\$10,000.00	
Partial Release of Earnest Money 5/31 to 8007 Burnet Holdings, LLC, A Texas limited liability company		\$10,000.00	
Partial Release of Earnest Money 7/31 to 8007 Burnet Holdings, LLC, A Texas limited liability company		\$15,000.00	
Partial Release of Earnest Money 9/3 to 8007 Burnet Holdings, LLC, A Texas limited liability company		\$15,000.00	
Hold Back to Austin Housing Finance Corporation		\$1,922.00	
Hold Back to Austin Housing Finance Corporation		\$114,969.55	
Independent Consideration			\$500.00
Total Funds Released to Seller			\$60,000.00
Debitations			
County taxes 1/1/2019 to 9/28/2019 @ \$73,634.76/Year			\$54,459.55
New Loans			
Principal amount of new loan			\$2,901,922.00
Title Charges			
Lender's coverage \$2,901,922.00 Premium \$106.00 to Texas National Title, Inc.		\$106.00	
R-24 Not Yet Due and Payable Tax Amendment Endorsement(s) to Texas National Title, Inc.		\$5.00	
T-19 Restrictions, Encroachments, Minerals (Non-Residential) Endorsement(s) to Texas National Title, Inc.		\$1,381.00	
T-30 Tax Deletion Endorsement(s) to Texas National Title, Inc.		\$20.00	
Endorsement(s) to Texas National Title, Inc.			
T-3 Area and Boundary (Non-Residential) Endorsement(s) to Texas National Title, Inc.		\$2,070.30	
T-19.1 Restrictions, Encroachments, Minerals (Non-Res w/Survey Amend) Endorsement(s) to Texas National Title, Inc.		\$1,380.20	
E-Recording Service Fee to Texas National Title, Inc.		\$17.04	
Settlement or closing fee to Texas National Title, Inc. \$800.00 Total: \$800.00		\$400.00	
State of Texas Guarantee Assessment Recoupment Fee to Texas Title Insurance Guaranty Association \$2.00		\$2.00	
Government Recording and Transfer Charges			
Recording fees: Deed \$30.00		\$30.00	
Mortgage \$74.00		\$74.00	
Restrictive Covenants to MLHC Recording Account \$46.00		\$46.00	
Environmental Indemnity Agreement to MLHC Recording Account \$58.00		\$58.00	
Totals		\$3,082,483.09	\$3,076,891.55

Balance Due FROM Borrower: \$5,591.54

APPROVED AND ACCEPTED

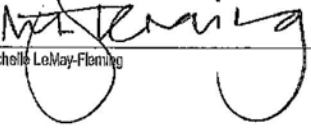
BUYER(S)

Project Transitions, Inc.,
a Texas non-profit corporation



Craig David, President

SETTLEMENT COORDINATOR



Michelle LeMay-Fleming

Addendum to Closing Statement

File Number: T-116444-MF

Date:

Legal Description:

Lot 7, Block H, of ALLANDALE NORTH SECTION EIGHT, a subdivision in Travis County, Texas, according to the map or plat of record in Volume 58, Page 53, of the Plat Records of Travis County, Texas.

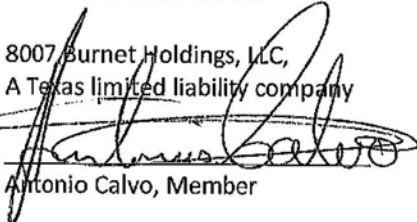
I have carefully reviewed the Closing Statement and to the best of my knowledge and belief, it is a true and accurate statement of all receipts and disbursements made on my account or by me in this transaction. The Company has deposited the earnest money that it has received in a demand deposit account that is federally insured to the maximum extent permitted by law. Demand deposit accounts are non-interest bearing pursuant to federal law, but offer immediately available funds for withdrawal after a check has cleared.

The Company may receive other benefits from the financial institution where the funds are deposited. Based upon the deposit of escrow funds in demand accounts and other relationships with the financial institution, Title Company is eligible to participate in a program offered by the financial institution whereby the Title Company may (i) receive favorable loan terms and earn income from the investment of loan proceeds and (ii) receive other benefits offered by the financial institution.


The Seller's and Purchaser's/Borrower's signatures hereon acknowledge their approval and signify their understanding that tax and insurance pro-rations and reserves are based on figures for the preceding year or supplied by others or estimated for the current year, and in the event of any change for the current year, all necessary adjustments will be made between Purchaser/Borrower and Seller directly. Any deficit in delinquent taxes or mortgage payoffs will be promptly reimbursed to the Settlement Agent by the Seller.

The parties have read and understood the above sentences, and recognize that the above relations herein are material and important. The parties agree to these statements, and recognize Title Company is relying on these recitations in closing this transaction. I certify and acknowledge that I have received a copy of this Closing Statement and have read and understood the disclosure stated above.

8007 Burnet Holdings, LLC,
A Texas limited liability company


Antonio Calvo, Member

Project Transitions, Inc.,
a Texas non-profit corporation


Craig David, President

The Closing Statement which I have prepared is a true and accurate account of this transaction. I have caused or will cause the funds to be disbursed in accordance with this statement.

Settlement Agent: 

Date: 9.27.19

WARNING: It is a crime to knowingly make false statements to the United States on this or any other similar form. Penalties upon conviction include a fine and imprisonment. For details, see: Title 18 U.S. Code Sections 1001 and 1010.

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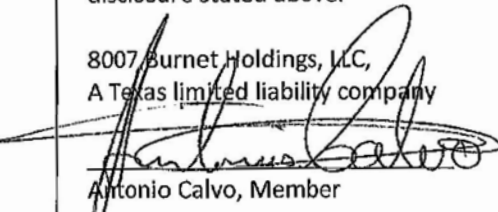
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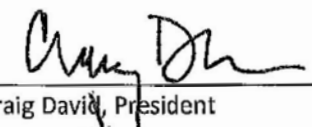
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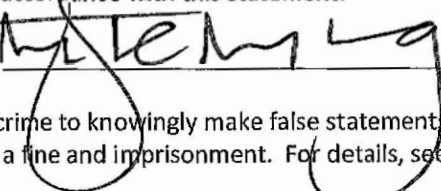
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**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5e. Phase I ESA

**PREVIOUSLY
PROVIDED**

**BURNET PLACE APARTMENTS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5f. SHPO

**NOT
APPLICABLE**