

TRUE CASA CONSULTING, LLC

May 6, 2021

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

RE: RHDA Application – Roosevelt Gardens

Dear Jamey:

I am pleased to submit this application for RHDA funding on behalf of Project Transitions, Inc. for the development of Roosevelt Gardens - 40 units of intensely, supportive and deeply affordable housing for persons living with HIV/AIDS at a phenomenal, amenity-rich and transit-connected site in Austin. Roosevelt Gardens started construction on January 4, 2021 and is now 11% of construction completion. The project started construction as 100% funded and locked in the contract during a lull in lumber pricing. However, since that time, lumber pricing has only continued to soar and the contractor had no other choice, but to issue a change order to reflect the surge in pricing.

Project Transitions, Inc. is coming to AHFC to provide funding to ensure that the project continues moving smoothly toward its goal of opening doors to 40 new units of supportive housing for persons living with HIV/AIDS by early next year. Project Transitions, Inc. is asking for \$259,925 in RHDA funding that will cover two items: the change order to the construction contract due to the uncontrolled spike in lumber pricing of \$235,625 and a cost of \$24,300 for additional commissioning to ensure a third party is evaluating and inspecting the thermal envelope, waterproofing on the plaza and elevated walkways, exterior wall systems, windows, and roofing. This extra assurance can save hundreds of thousands of dollars in future capital improvement costs if not constructed properly. The additional commissioning also assists the property in moving toward a five-star Austin Energy Green Building rating – a huge plus for an all bills paid by landlord property.

Copies of the change order and the commissioning proposal are attached.

I want to hi-light the characteristics to assure you that this request is one of little risk and all reward:

- 1) In 2019, Project Transitions, a small and mighty non-profit submitted their first application to funding for Roosevelt Gardens for big plans to re-develop their existing apartment community. Fast forward to now - a brilliant development team has been assembled, construction has started, slabs have been poured, and up until two weeks ago – the project was fully funded.
- 2) With the change order for lumber pricing out of the way, there are no further unexpected change orders for the project. The construction contract has preserved its small contingency for any small changes that almost always will come up as construction completes.
- 3) If this was a project still in design phase, the development team could value engineer to make changes to compensate for the lumber price spike. Since this project is under construction, the project is fully at the mercy of having to find a source to plug this hole. Foundations and corporations are not keen to giving money to projects already under construction and it would be difficult to thread the timeline between grant submission, approval and disbursement. The AHFC is a known process and timeline and one that can be accommodated during the construction timeline.

TRUE CASA CONSULTING, LLC

Finally, I would like to point out a flaw with the AHFC scoring when it comes to a project like Roosevelt Gardens – supportive housing with a HOPWA facilities-based contract. The project does not achieve threshold due to three main reasons:

- 1) The scoring does not account for a project with no debt. If you were to model this project with rental income at the committed set-asides and carrying debt at a 1.20 DCR, then this project would score above threshold.
- 2) The project has already started construction. We cannot increase the accessibility units or unit mix to gain points. The unit mix is also heavily skewed toward multi-bedroom units (understandably), but does not recognize the unit mix that is intentional to meeting the specific needs of persons with special needs.
- 3) The project has already closed on all funding and can't layer on a new set-aside for COC units. This is specifically the case with the TDHCA MFDL funding.

It should also be noted that the neighborhood containing Roosevelt Gardens is extremely high opportunity, but does not score as such in the City of Austin matrix. It is for these reasons that the project cannot get above threshold and why we ask that you consider the scoring modeled as a conventional affordable housing project.

We are so thankful for this opportunity and appreciate your guidance through this process.

Best,
Jenn Hicks



AIA[®]

Document G701™ – 2017

Change Order

PROJECT: *(Name and address)*
Roosevelt Gardens
5606 Roosevelt Ave
Austin, Texas 78756

CONTRACT INFORMATION:
Contract For: General Construction
Date: June 08, 2020

CHANGE ORDER INFORMATION:
Change Order Number: 001
Date: May 3, 2021

OWNER: *(Name and address)*
Project Transitions
7101 Woodrow Avenue
Austin, Texas 78757

ARCHITECT: *(Name and address)*
hatch + ulland owen architects
1010 East 11th Street
Austin, Texas 78702

CONTRACTOR: *(Name and address)*
Braun & Butler Construction, Inc.
300 Hazelwood St., Ste. 100
Leander, Texas 78641

THE CONTRACT IS CHANGED AS FOLLOWS:

(Insert a detailed description of the change and, if applicable, attach or reference specific exhibits. Also include agreed upon adjustments attributable to executed Construction Change Directives.)

This change order includes material cost increases for lumber, adding a grate and piping in the courtyard sidewalk, irrigation tee valve to the waterline, an increase to the height of the elevator shaft, adding 50 SOHO boxes, and associated rough-in, receptacle, and data backbox. It also includes the Aquatics ADA compatible shower to all units, fluid-applied dampproofing to the CMU wall, and new kitchen hood and louver, and fire dampers. The workdays add 14 days for work around the shower stalls and additional various rough-in requirements. Another 16 days is required for the installation of the fire damper and access doors.

The original Guaranteed Maximum Price was	\$	7,149,384.00
The net change by previously authorized Change Orders	\$	0.00
The Guaranteed Maximum Price prior to this Change Order was	\$	7,149,384.00
The Guaranteed Maximum Price will be increased by this Change Order in the amount of	\$	235,625.00
The new Guaranteed Maximum Price including this Change Order will be	\$	7,385,009.00

The Contract Time will be increased by thirty (30) days.
The new date of Substantial Completion will be

NOTE: This Change Order does not include adjustments to the Contract Sum or Guaranteed Maximum Price, or the Contract Time, that have been authorized by Construction Change Directive until the cost and time have been agreed upon by both the Owner and Contractor, in which case a Change Order is executed to supersede the Construction Change Directive.

NOT VALID UNTIL SIGNED BY THE ARCHITECT, CONTRACTOR AND OWNER.

hatch + ulland owen architects

ARCHITECT *(Firm name)*

Braun & Butler Construction, Inc.

CONTRACTOR *(Firm name)*

Project Transitions

OWNER *(Firm name)*

SIGNATURE



SIGNATURE

SIGNATURE

PRINTED NAME AND TITLE

Damon Pfaltzgraff, Project Manager

PRINTED NAME AND TITLE

PRINTED NAME AND TITLE

DATE

05/03/2021

DATE

DATE



Job Name: **ROOSEVELT GARDENS**

Date: 4/28/2021

Lumber Costs

	Mhrs	Qty	Unit	Miscellaneous		Labor		Material		Total
				UP	Amount	UP	Amount	UP	Amount	
0 Project Information										0
6 Rough Carpentry					0					0
Lumber Cost Increase		1	ls		0				139411	139,411
					0					0
										0
Project Insurance		1	ls	0	1,394					1,394
										0
										0
SUBTOTAL					1,394		0		139,411	140,805
CM Fee		6.00%								8,448
Total Before Bond										149,253
Bond Cost (yes=1)		1								3,239
Sales tax on Material		0.00%								0
Sales tax on Total		0.00%								0
SUMMARY TOTAL										152,492



Job Name: **ROOSEVELT GARDENS**

Date: 4/20/2021

ASI Modifications

	Mhrs	Qty	Unit	Miscellaneous		Labor		Material		Total
				UP	Amount	UP	Amount	UP	Amount	
0 Project Information										0
										0
2.91 Site Utilities					2,280					2,280
Add ball valve and tee for irrigation										0
Add ADA complaint grate in courtyard sidewalk										
4 Masonry					990					990
Added 60SF (1' vertical) to CMU elevator per ASI 05										0
										0
16 Electrical					0					0
ASI 02: Add 1x receptacle per SOHO		50	ea	75	3,750					3,750
ASI 02: Add 1x Back Box for data		50	ea	32	1,600					1,600
				0						0
16.10 Communications					7,110					7,110
SOHO Boxes per ASI 02 (50 total)										0
										0
Project Insurance			1 ls	0	94					94
										0
										0
SUBTOTAL					15,824		0		0	15,824
CM Fee		6.00%								949
Total Before Bond										16,774
Bond Cost (yes=1)			1							419
Sales tax on Material		0.00%								0
Sales tax on Total		0.00%								0
SUMMARY TOTAL										17,193



Job Name: ROOSEVELT GARDENS

Date: 4/8/2021

ADA Shower Stalls (Aquatic Brand, All Stalls)

	Mhrs	Qty	Unit	Miscellaneous		Labor		Material		Total
				UP	Amount	UP	Amount	UP	Amount	
0 Project Information										0
										0
15.10 Plumbing					0					0
ADA Convertible Shower Stalls		41	ea		3,210			522.01	21,402	24,613
ADA Stalls - 0 cost - base bid										0
										0
Project Insurance		1	ls	0	246					246
										0
										0
SUBTOTAL					3,456		0		21,402	24,859
CM Fee		6.00%								1,492
Total Before Bond										26,350
Bond Cost (yes=1)		1								659
Sales tax on Material		0.00%								0
Sales tax on Total		0.00%								0
SUMMARY TOTAL										27,009



Job Name: ROOSEVELT GARDENS

Date: 4/12/2021

ASI 2, 3, 5, 6, 7 and RFI 09

	Mhrs	Qty	Unit	Miscellaneous		Labor		Material		Total
				UP	Amount	UP	Amount	UP	Amount	
0 Project Information										0
6 Rough Carpentry					0					0
ASI 02: Rough Open for SOHO Boxes (50)		50			1,161					1,161
ASI 03: Roof Slope Transition to Flat					1,715					1,715
ASI 05: Soffit Trim Changes					4,877					4,877
ASI 06: Addt'l Hood Work					1,433					1,433
ASI 07: Wall framing at CMU Wall					4,486					4,486
										0
6.20 Millwork					0					0
ASI 06: Common Kitchen Cabinetry Covered by B&B					0					0
										0
7 Dampproofing					0					0
ASI 07: Fluid Applied Barrier to CMU Wall approx 674SF		674	sf	0.00	0		824		550	1,374
										0
15.20 HVAC					0					0
ASI 06: New Kitchen Hood and Louver							1666		4270	5,936
RFI 09: Independent Fire Damper					1,525		7600		7200	16,325
Deduct for Radiant Dampers									-1695	-1,695
										0
Project Insurance			1 ls		0	220				220
										0
										0
SUBTOTAL						15,417	10,090		10,325	35,832
CM Fee		6.00%								2,150
Total Before Bond										37,982
Bond Cost (yes=1)			1							950
Sales tax on Material		0.00%								0
Sales tax on Total		0.00%								0
SUMMARY TOTAL										38,931



March 29, 2021

Project Transitions
Attn: Mrs. Madge Whistler
7101 Woodrow Avenue
Austin, TX 78757

Re: Rising lumber prices

Dear Mrs. Whistler,

As you know the COVID-19 pandemic brought on many challenges and unforeseen circumstances. The construction industry has not been immune to them and perhaps the largest and far-reaching challenge to date is the rising cost of lumber.

The increase in lumber costs is something that we could not have predicted. The price of lumber per thousand board feet has increased 188% since the onset of the pandemic. The National Association of Home Builders calculated that the current lumber pricing increase has added at least \$24,000 to the price of a typical new single-family home. Using an average square footage of 2,600 for a new home and we get an increase of \$9.23/sf! The Texas Framing Lumber Brief that's attached further illustrates the unprecedented increase in lumber prices over the past 9-10 months. As a result, we are requesting additional funds to help cover the increase in lumber costs.

Our contract Guaranteed Maximum Price of \$7,149,384 contains a line item for Rough Carpentry (RC) totaling \$887,700. That line item can be broken down into labor and materials costs as follows:

- Roof trusses, floor trusses and beams - \$103,480
- Hardie panels, siding and exterior trim - \$353,825
- Labor and equipment - \$349,695
- Subcontractor Overhead and Profit (10%) – \$80,700

The increase in lumber prices over the last five months resulted in an approximate 55% increase in material costs for Roosevelt Gardens. The current Rough Carpentry line item cost increases are outlined below:

- Roof trusses, floor trusses and beams – Increased \$22,431 equating to a revised total of \$125,911
- Hardie panels, siding and exterior trim – Increased \$230,842 equating to a revised total of \$584,667
- Labor and equipment - \$349,695 – no pricing changes to these items

- Overhead and Profit (10%) – Increased \$25,327 equating to a revised total of \$106,027

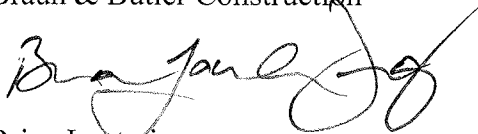
To summarize, the total increase to the Rough Carpentry line item, due solely to materials costs, is \$278,600.

During the subcontracting and buy out phase of the project Braun & Butler worked diligently to strictly define and narrow subcontractor scopes of work. Through this exercise we were able to create savings in multiple line items in the GMP, resulting in a total savings to date of \$138,789 (see attached for savings breakdown). We propose that savings be applied to the total lumber price increase, resulting in our request for a change order of \$139,411 (\$278,600 - \$138,789). Please note that the project contingency balance of \$51,397 so that money is still in the project budget should future needs arise.

It is our goal to not only provide a quality project, but to complete the project in the most cost-effective manner. We will continue to monitor the project expenses and costs with diligence. We will provide updates on the overall project budget monthly.

Please let me know when you have time to discuss our request in greater detail. We are looking forward to talking with you soon.

Sincerely,
Braun & Butler Construction

A handwritten signature in black ink, appearing to read "Brian Lauterjung", with a stylized flourish at the end.

Brian Lauterjung
Executive Vice President



1-800-231-2310

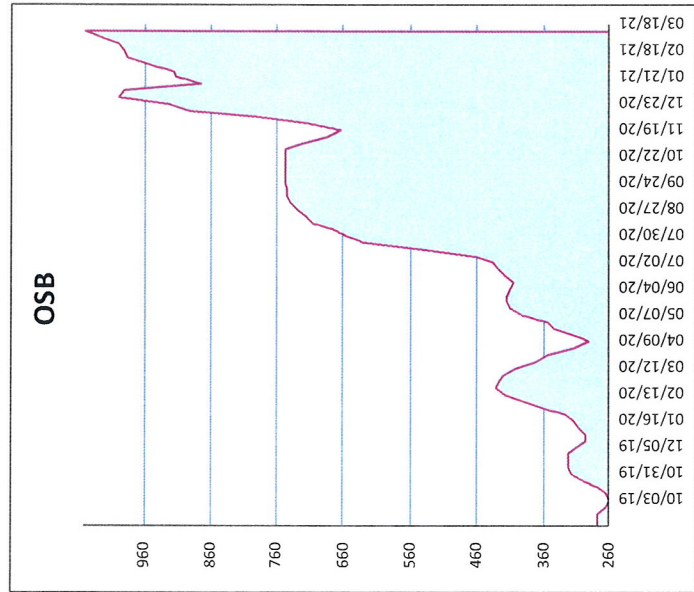
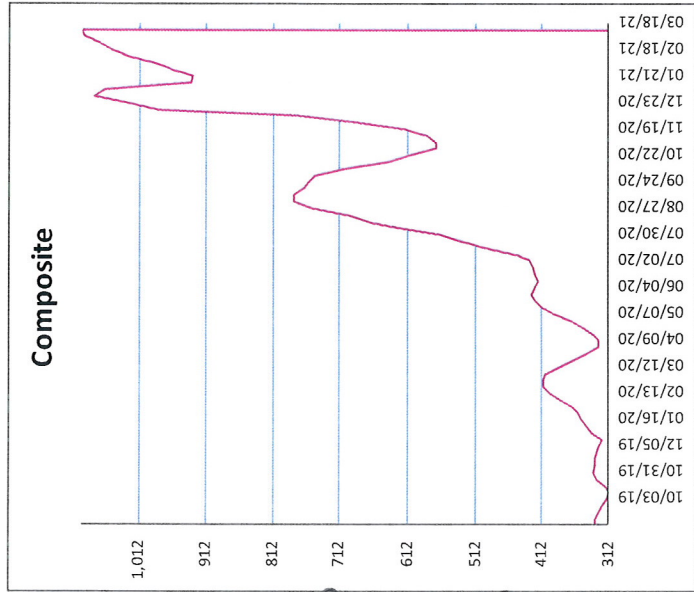
Texas Framing Lumber Brief

03/18/21

All items are priced as a general market guide. Please call our sales office for specific quotes in your respective market.

	This Week	Weekly Change	Last Year
2X4 104-5/8" STUD DF KD	1295	10	510
2X6 104-5/8" STUD DF KD	1305	10	515
2X4 #3 SYP (Westside)	875	5	315
2X4 UTILITY SFP (Western)	945	-5	345
2X6 #3 SYP (Western)	715	0	250
2X12 #2 SYP (Westside)	1500	5	510
2X4 #2 SYP (Westside)	1150	-50	370
4X8 15/32 OSB (Southwest)	1005	25	335
4X8 23/32 OSB T&G (Southwest)	1100	20	510
Composite Average	1,099	02	407

186% ↑
200% ↑
115% ↑



Prices are F.O.B. mill, excluding freight

Lumber markets appear to be reaching the point of price fatigue. Job delays are a real issue as lack of prompt supply on panels and EWP appear to be slowing the torrid pace of construction.

There is availability on dimension lumber in most species, and cracks may be developing as the demand slows. Reports of a dip in single family construction starts and permits in February due to pushback at the higher costs of building materials has many wondering if this could be a tipping point.

Regardless, plan ahead as supply issues are still going to create delays and headaches.



March 29, 2021

Roosevelt Gardens - Savings realized through buyout/subcontracts to date:

1. Sitework – \$3,000
2. Site demolition – \$8,200
3. Pest Control – \$2,023
4. Countertops – \$2,497
5. Waterproofing/metal flashing/Sealants – \$23,058
6. Spray foam insulation - \$12,100
7. Doors, frames and hardware – \$12,720
8. Residential windows – \$5,485
9. Flooring – \$5,100
10. Residential Appliances – \$9,000
11. Elevator – \$4,088
12. HVAC – \$13,500
13. Electrical – \$20,000
14. Lightning protection – \$3,018
15. Surveying – \$15,000

TOTAL SAVINGS: \$138,789.00

NOTES:

- Item 10 – The savings noted does not include potential savings if dishwashers are deleted from units
- The savings noted above do not include any additional costs related to ASI's or PR's that have been provided through 3/29/2021

March 9, 2021

Ms. Madge Whistler

Project Transitions, Inc
7101 Woodrow Ave
Austin, TX 78757

Re: PROPOSAL FOR PROFESSIONAL SERVICES
Roosevelt Gardens
Austin, TX
Terracon No. FW216022

Dear Ms. Whistler:

Terracon Consultants, Inc. (Terracon/Consultant/BES) is pleased to prepare this professional services proposal for Roosevelt Gardens in Austin, TX. This proposal was requested by Mr. Mitch Weynard (Project Transitions, Inc.) and is based on a cursory review of project Drawings entitled "Construction Documents" dated 11 May 2020 and prepared by Hatch + Ulland Owen Architects. This revised proposal is based on our phone conversation with Mr. Weynard on March 9, 2021.

We are most interested in working with Project Transitions, Inc. (Client) on this project and know that we are well qualified to perform the type of services requested. This proposal includes our proposed scope of services, fee proposal, and the means for you to authorize us to perform the scope of services described.

PROJECT INFORMATION

The Roosevelt Gardens project consists of a three-story multifamily development in Austin, TX. The building's envelope systems will consist of CMU, brick, stucco, ceramic tile, cementitious siding, low and steep-sloped roofing, vinyl windows, and elevated balcony waterproofing.

It is our understanding that the project team is seeking Austin Energy Green Building (AEGB) points for Additional Commissioning (Cx) "Thermal Envelope Commissioning" and has requested this proposal to satisfy those requirements. The services in this proposal are in general conformance with the Building Enclosure Commissioning (BECx) requirements of AEGB and NIBS Guideline 3-2012 as well as the Commissioning (Cx) requirements of ASHRAE Guideline 0-2005.



SCOPE OF SERVICES

Our services will include building envelope consulting during the Construction Phase of the project. As requested by Mr. Weynard during our March 9, 2021 phone call - elevator pit waterproofing, ceramic tile cladding, unit masonry veneer, CMU, and cementitious cladding are not included in our Scope Definition.

Terracon will evaluate the integration of the building envelope systems and address conditions that may adversely impact the durability and resistance of the building envelope system to air and water penetration and other specified performance requirements. To properly accomplish our services, we recommend the following.

Phase 1 - Construction Phase Services

The following is a more detailed description of our Scope of Services for each phase.

Scope Definition

Terracon understands the building envelope design is currently in the Construction Phase for this project. From the information obtained within the project documents, we have included the following building envelope systems within our Scope of Services:

Wall Systems:

- Continuous air and water-resistive barriers (WRB)
- Stucco
- Metal flashings
- Exterior joint sealants

Waterproofing Systems:

- Horizontal plaza/elevated deck waterproofing

Fenestration:

- Residential/light commercial windows

Roof Systems:

- Steep-slope roofing
- Low-slope roofing
- Roof specialties
- Roof accessories
- Sheet metal flashing and trim

Phase 1 - Construction Phase Services

The following provides a detailed description of the services associated with the Construction Phase Services phase of the project.

1. **Submittal and Shop Drawing Review** - Review contractor's submittals for conformance with the construction documents and project specifications. Consultant has included up to 18 hours for review of submittal or shop drawing packages for the building envelope systems within our scope of service. We will not provide stamped shop drawings or stamped submittal

reviews as this is the responsibility of the Architect-of-Record. Our comments will be provided in a separate document for Consultant's Client's consideration.

2. **Construction Observations** - Perform periodic on site construction observations during the installation of the building envelope systems to determine if the installation(s) are in general conformance with the construction documents, and also to address a reasonable amount of building envelope related constructability issues. Documentation will be in the format of a written field observation report presenting conditions observed by Consultant at the time of our site visit and our general recommendations for Consultant Client consideration.

For budgeting purposes, we have estimated an approximately 12-month construction duration for the building envelope and have estimated that up to 12 site visits will be required to complete our observations of building envelope systems installations within our Scope Definition (site visits are anticipated to be performed on a weekly or bi-weekly basis). If additional construction observation is necessary, Consultant can provide these additional services upon request. These site visits will be used to facilitate preconstruction meetings, mockups and initial installations, coordination meetings, and periodic site observations as required.

3. **Construction Changes and Clarifications/RFI Response** - Respond to field questions and requests for information based upon conditions encountered during the installation of the building envelope systems. For budgeting purposes, Consultant has allotted up to 8 total hours to address building envelope issues within our scope of service including research, special site meetings, and generation of details encountered during the course of construction.
4. **Building Enclosure Commissioning (BECx) Plan** - Consultant will meet with the Owner and the Project Team to review scope and budget of the Building Enclosure Commissioning Provider (BECxP) and develop the BECx Plan. Emphasis will be placed on establishing the extent of performance verification testing of building enclosure systems to be required. Performance verification testing of building enclosure installations may include whole building air leakage testing, static and dynamic water penetration testing of opaque walls and fenestration, coating and sealant adhesion strength testing, infrared imaging, electronic leak detection, and roof uplift testing. Consultant will review building enclosure aspects of Basis of Design (BOD) and Owner's Project Requirements (OPR) documents for project familiarity. The BECx Plan is a "living document" (not part of the Contract Documents) that is continually updated and resubmitted to the project team at multiple project milestones.

We recommend that our scope of services be provided to all Project Team members so they are all knowledgeable of our scope of services. This will help to minimize problems with scope creep and to maintain budget.

LUMP SUM FEE PROPOSAL

Consultant proposes to perform the Scope of Services outlined above for the lump sum fee and reimbursable expenses below.

Phase 1 - Construction Phase Services

Submittal and Shop Drawing Reviews	\$ 3,500.00
Construction Observations (12)	\$ 16,800.00
Construction Changes and Clarifications/RFI Response	\$ 1,500.00
Building Enclosure Commissioning (BECx) Plan	\$ 2,500.00

Total **\$ 24,300.00**

If necessary, we can work with you to adjust this scope and fee proposal to help better meet your needs.

Our payment terms are based on progressive compensation for services rendered, and our invoices will be issued monthly. We will endeavor to inform you as the project progresses if it appears that the proposed services may need to be exceeded. This proposal is valid for 30 days after the date of this proposal. No services will be performed beyond the approved total without prior approval by Consultant's Client.

If Consultant is requested to provide additional services outside of those listed above, we will either revise our services and fee proposal to extend the scope of our services or provide the additional services based upon actual hours worked at our standard hourly rate in effect at the time our services are performed. All expenses will be based upon the actual expense with our standard markup. All requests for additional services are to be made through Consultant's Project Manager listed below.

AUTHORIZATION

Please provide us formal authorization by signing in the space on the last page of this proposal. We will perform the scope of services described in this proposal under the attached Agreement for Services. We understand our contract will be with, and our invoices will be paid directly by Consultant's Client. Our payment terms are based on compensation for services rendered at the rates current when our services are performed. You can email a signed copy of this agreement to expedite authorization; however, we need to have an original signed copy returned to us for our files. Please provide us with any special procedures or P.O. numbers necessary for your authorization and any special invoicing requirements to help ensure efficient processing of our invoices. Until we have a mutually agreed signed contract, it is mutually understood that we are working under Terracon's Agreement for Services that are attached, for any services we are instructed to perform.

If Additional Insured(s) and Waiver of Subrogation are to be listed on the certificate of insurance, Terracon's providers require they be included in the final Agreement. If this proposal is incorporated into the final Agreement, you may write in the complete name and address of the Additional Insured(s) in the area designated below. Please review any legal requirements you may have as the Additional Insured(s) will be copied into the certificate exactly as they are written.

CLOSING

Thank you for requesting Terracon to prepare this proposal for you. We look forward to the opportunity of serving you on this project. Once you have had an opportunity to review this proposal, we will contact you in a few days to see if we can answer any questions or be of any further assistance.

Very truly yours,

Terracon Consultants, Inc.
TBPE Firm Registration No. F-3272

Keith Simon, AIA, BECP, CxA+BE
Senior Architectural Consultant
Senior Associate

John Hunt, CRC
Senior Project Professional
Project Manager

Encl.: Agreement for Services

Agreed and Approved

Name: _____ (please print)

Authorized Signature: _____

Title: _____

As Agent or Principal For: _____

Date: _____

Additional Insured

Name: _____

Street Address: _____

Town, State, Zip Code: _____

TERMS AND CONDITIONS

These Terms and Conditions for Building Exterior Solutions, Inc (BES) are included with and part of the attached proposal and will continue in full force and effect during, and after the completion or termination of, the engagement of BES by the Client, and will control any conflicting term or condition unless BES agrees otherwise in writing. The Client is named on the "Client" line filled in by the Client on the attached proposal.

PERFORMANCE. BES and its employees will exercise the degree of skill and care expected by customarily accepted practices and procedures. NO WARRANTIES, EXPRESSED, IMPLIED OR STATUTORY, (INCLUDING ANY IMPLIED CONDITIONS OR WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE) ARE MADE WITH RESPECT TO BES'S PERFORMANCE, UNLESS AGREED TO IN WRITING. BES is not a guarantor of the project to which its services are directed, and its responsibility is limited to services described in the proposal and performed for the Client. BES may rely upon information supplied by the Client, or the contractors or consultants involved, or information available from generally accepted reputable sources, without independent verification. BES is not responsible for acts or omissions of the Client, nor for third parties not under its direct control. BES IS NOT LIABLE FOR ANY REASON FOR ANY PUNITIVE DAMAGES OR ANY SPECIAL, INDIRECT, OR CONSEQUENTIAL DAMAGES (INCLUDING BUT NOT LIMITED TO LOSS OF USE, POWER, REVENUE, PROFIT, OR BUSINESS GOODWILL, OR FOR BUSINESS INTERRUPTION). BES will take reasonable precautions to minimize any damage to the Client's property during conduct of any BES field work and testing. However, in the normal course of this type of work some damage may occur, and BES will have no liability for this damage. BES's services are performed solely for the Client's benefit. No contractor, subcontractor, supplier, fabricator, manufacturer, tenant, occupant, consultant, or other third party will have any claim against BES as a result of BES's services. BES may suspend performance of its services if the Client fails to make payment when due, and will have no liability to the Client for delay or damage caused the Client because of such suspension of services.

LIMITATIONS DURING FIELD WORK, CONSTRUCTION, OR REPAIR WORK. During, or as part of the process of, field work, construction, or repair work, BES will not control, have charge of, or be responsible for construction means, methods, techniques, sequences, or procedures, or for safety precautions and safety programs in connection with the project; these are solely the responsibility of others. BES is not responsible for the safety of other persons and property. BES is not responsible for, among other things, the contractor's schedules, performance of the work in general compliance with the contract documents, timeliness in the completion of the work, superintending the work, compliance with regulatory requirements, or failure to carry out the project in accordance with the contract documents. BES will not control or have charge of acts or omissions of the contractor, subcontractor, suppliers, or their agents or employees, or any other non-BES persons performing portions of the project. BES will perform field work only under conditions deemed safe by BES.

LIMITATION OF LIABILITY. To the fullest extent permitted by law, the Client agrees to limit BES's liability and hold harmless for any and all claims, losses, costs, expenses, or damages of any nature whatsoever, including reasonable attorney's and expert witness' fees and costs, from any cause or causes, (including without limitation, by reasons of negligence, warranty, strict liability, tort, contract, or otherwise), arising out of or in connection with BES's services associated with this project, to fees actually paid for services. If the Client wishes a greater limit, BES will attempt to obtain insurance, and Client will pay for the cost of the insurance. It is intended that this limitation apply to any and all liability or causes of action however alleged or arising, unless specifically prohibited by law.

PROPOSALS. Proposals expire 30 days after submission to the Client unless a different expiration limit is included in the proposal. BES may withdraw or modify a proposal at any time prior to acceptance by the Client.

FEES, EXPENSES, AND BILLING TERMS. Fees (time charges) for services will be accrued on an hourly basis unless other arrangements are made. Use of personal vehicles is billed at \$0.565 per mile. Expenses and subcontracted services are billed at cost plus 10%. BES equipment used in field work, such as cameras and tools, is billed at approximately 1% of its cost per day. The Client is responsible for payment of charges. Accumulated charges will be billed on an approximately monthly basis, and payment in full is due upon receipt of the invoice. Invoices which are not paid within 30 days from the invoice date are past due and will incur an interest charge of 1.5% per month, a \$50 per month administrative services charge, and related attorneys' fees and collection expenses. All fees and expenses quoted in proposals or listed in invoices are exclusive of taxes. Client shall be responsible for all taxes, levies, and assessments (excluding taxes based on BES's net income), and shall, upon notice from BES, promptly pay such taxes, levies, and assessments, or if BES has paid any such amounts, reimburse BES for all such all taxes, levies, and assessments.

INSURANCE. BES is protected for general, automobile, workers' compensation, and employers' liability coverage by policies written by national insurance companies rated by the A. M. Best Company. Coverage is subject to annual renewal. Limits and coverages are available upon request. Increased or additional coverages may be available, and their associated costs will be paid by the Client.

SUBPOENAS AND COURT ORDERS. The client is responsible for payment of time charges, attorneys fees, and other expenses

resulting from a required response to subpoenas or court orders issued at the request of any party concerning any part of BES's work. Charges are based on billing rates in effect at the time of BES's response.

DISPUTE RESOLUTION. In any dispute that should arise between the Client and BES, the parties agree that as a condition precedent to any litigation/arbitration, the matter must first be submitted to mediation. The mediator will be mutually agreed upon and chosen from a list provided by the American Arbitration Association or other source of experienced professional mediators.

HAZARDOUS MATERIALS. BES's services do not include the identification of hazardous materials, and BES has no duty to identify or attempt to identify the same within the area of the project. "Hazardous materials" includes, but is not limited to, any substance, waste, pollutant (including mold and mildew) or contaminant, in whatever form, now or hereafter included with such terms under any federal, state, or local statute, code, rule, ordinance, or regulation which presently exist or may in the future be enacted or amended. Except as such liability may arise out of BES's sole gross negligence in the performance of services on this project or to the extent of insurance coverage available for the claim, the Client will hold BES harmless and indemnify and defend BES and its employees, subcontractors, and agents from and against any and all claims, lawsuits, damages, liability and costs, including but not limited to, costs of defense arising out of or in any way connected with the presence, discharge, release, or escape of hazardous materials.

INDEPENDENT CONTRACTOR. BES's relationship to Client is that of an independent contractor and not a partner, joint venture party, member, agent, or employee.

ASSIGNMENT. Neither the proposal nor these Terms and Conditions are assignable or transferable, in whole or in part, without the written consent of BES and Client.

COMMUNICATIONS. All notices and communications required to be given under the proposal and these Terms and Conditions shall be made in writing and deemed to have been made if mailed or hand-delivered to the other party at the address for such party listed in the proposal.

GOVERNING LAW. THE PROPOSAL AND THESE TERMS AND CONDITIONS SHALL BE GOVERNED BY THE LAWS OF THE STATE OF TEXAS, EXCLUSIVE OF ITS CHOICE OF LAW PROVISIONS.

END OF DOCUMENT



RENTAL HOUSING DEVELOPMENT ASSISTANCE APPLICATION

May 7, 2021



Roosevelt Gardens
5606 Roosevelt Avenue
Austin, TX 78756

APPLICATION CHECKLIST/ INFORMATION FORM

DEVELOPER : Project Transitions, Inc.	OWNER/BORROWER NAME : Project Transitions, Inc.
DEVELOPMENT NAME : Roosevelt Gardens	FUNDING CYCLE DEADLINE : May 7, 2021
FEDERAL TAX ID NO: 74-2502171	DUNS NO: 788375921
PROJECT ADDRESS: 5606 Roosevelt Avenue	PROGRAM : RHDA / OHDA / BOTH
CONTACT NAME : Jennifer Hicks	AMOUNT REQUESTED: \$275,000
CONTACT ADDRESS AND PHONE : 3000 Skylark Drive, Austin, TX, 78757 512-203-4417	

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

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

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

 PRINTED NAME
 Cynthia Herrera
 TITLE OF APPLICANT
 Chief Executive Officer
 DATE OF SUBMISSION
 5/7/2021

DATE AND TIME STAMP OF RECEIPT

 FOR AHFC USE ONLY



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

APPLICATION TABS

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



Project Description

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

A further motivation for Project Transitions to expand their housing footprint is a unified response to the Getting To Zero (GTZ) Strategy, a UNAIDS commitment to end the AIDS epidemic by achieving zero deaths, zero new infections, and zero discrimination and stigma by 2030. The City of Austin's commitment to the strategy was formalized by the Mayor's and County Judge's signing of the Paris Declaration to join the Fast-Track Cities (FTC) initiative on June 20, 2018. Housing has been identified as a critical component of the GTZ, as persons living with HIV/AIDS who do not have stable housing are much less likely to access and remain in medical care than are those who do have stable housing. Remaining in medical care and getting and staying on an effective medication regimen reduces a person's risk of transmitting HIV to a non-infected person to nearly zero, stopping the cycle of transmission and infection.

Roosevelt Gardens currently consists of 22 residential units (16 1-BR and 6 2-BR), a community center with a commercial kitchen and offices for staff, and a laundry room for residents' use. It is a two-story facility with an elevator. The facility was built in 1969, and despite ongoing maintenance and upgrades over the past two decades, all major systems are in need of replacement.

As is described in the Market Assessment below, various factors, including the challenging situation in the affordable housing market in Austin and the increasing need for affordable supportive housing for persons living with HIV/AIDS in Austin, coupled with the physical condition of the current Roosevelt Gardens facility, require Project Transitions to take 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 demolish the existing 22-unit Roosevelt Gardens and construct a new 40-unit Roosevelt Gardens.

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

The tenant population, income levels and services will remain the same as current for the existing Roosevelt Gardens. 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 operating assistance.

Roosevelt Gardens will be 40 units of affordable, multifamily rental units in a supportive environment. The proposed unit mix is reflective of the housing needs of PT's current client population. Currently there are only 5 households on PT's 2-bedroom waitlist and over 50 individuals on the 1-bedroom waitlist with a 1.5 year long wait for service. This is a reflection of the HIV epidemic (who is getting infected), the priorities of other housing providers in Austin (families with children tend to be housed a bit faster) and the configuration of PT's existing units (not having enough 1-bedroom apartments.) The redevelopment provides an opportunity to create a unit mix that best serves the target population.



Unit Type	# of Units	Square Footage
STUDIO	12	440
1 BR/1BA	22	442
2 BR/2 BA	6	906
TOTAL UNITS	40	20,440

Number and percentage of **units by Median Family Income level:**

Median Family Income Level	# of Units	% of Total Units
30% MFI	21	53%
50% MFI	19	47%

Of the households served in 2019, 78% were 0-30% of the MFI, and 22% were 31-50% MFI. No households were above 50% MFI reflecting the deep and expansive impact of PT's housing program.

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

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



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

All units at Roosevelt Gardens will receive HOPWA operating assistance and therefore will not be available for Housing Choice Voucher holders; however, if a unit becomes available that is not subsidized with HOPWA operating assistance it will be available to a Housing Choice Voucher holder.

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

10% of the total units (4 units) are designed for persons with mobility impairments. In addition, 2% of total units (1 unit) are accessible for persons with hearing and visual impairments.

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

The proposed Roosevelt Gardens is an existing multifamily property in the Brentwood/Highland Combined Neighborhood Plan. The Brentwood/Highland Combined Neighborhood Plan was adopted on May 13, 2004 by the City of Austin. The plan's vision is complementary to the redevelopment of Roosevelt Gardens specifically evidenced by the following goals:

- Preserve and enhance the single-family residential areas and housing opportunities for persons with disabilities. [Roosevelt Gardens will both preserve and enhance housing opportunity for persons living with disabilities.]
- Maintain existing civic and community institutions. [PT's first breath occurred in the Brentwood Neighborhood with the establishment of Doug's House on Justin Lane. PT's main office is the Crestview Shopping Center in the border neighborhood of Crestview. Roosevelt Gardens has been a part of the neighborhood since its inception. PT is an existing community institution that will be expanded with the redevelopment of Roosevelt Gardens.]
- Improve affordability of home-ownership and rental properties. [The redevelopment of Roosevelt Gardens will preserve and expand affordability in the Brentwood/Highland Neighborhood.]

Roosevelt Gardens has been designed to weave into the existing neighborhood fabric and will be an exceptional example of high-quality affordable housing that is an asset to its neighbors and community.

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

The total cost to construct the 40-unit Roosevelt Gardens redevelopment is \$9,208,799. The sources of funds for this project include:

City of Austin, in the total amount of \$4,950,000 with the current ask of \$259,925 for a total of \$5,209,925. These funds will be used to pay for pre-development and/or hard and/or soft costs. Since this project is serving a very special needs population with a fixed subsidy amount, the project will only be feasible if there is no debt service to repay. As the only provider of intensively supportive housing for persons with HIV/AIDS in Central Texas, the City of Austin is necessary to rapidly deliver units to meet its shared goal of Getting to



Zero. Funds were awarded by the City to be in the form of a deferred forgivable loan with a loan term of at least 40 years.

TDHCA Multifamily Direct Loan, in the amount of \$3,000,000. Funding committed and closed. Loan will be deferred, forgivable funding to Supportive Housing projects and those projects with significant units set-aside for persons with Extremely Low Incomes and Special Needs.

TDHCA Pre-Development Grant, in the amount of \$50,000. Funding committed, closed and drawn for pre-development expenses.

City of Austin Resource Recovery Brownfield Grant, in the amount of \$100,000. Funding committed, closed and drawn to cover the completed asbestos abatement for the property.

TSAHC construction loan to bridge fundraising in the amount of \$150,088 and interest only at 3% once drawn. Funding committed and closed.

Deferred Developer Fee in the amount of \$679,000. Project Transitions is expected to give up their entire developer fee.

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

The current property was occupied at the time of original application to the AHFC and have since been relocated through a methodical and compassionate transition of clients to TBRA assistance in which they have been placed in market housing until the redevelopment of Roosevelt Gardens is complete. Project Transitions administers a separate TBRA program and will leverage existing partnerships with landlords to appropriately house clients. This relocation plan will occur in full coordination with Austin Public Health as the contract administrator for those HOPWA funds.

The existing structure is a series of four separate buildings connected by common walkways and roof with the following unit mix:

Unit Type	# of Units	Square Footage
1 BR/1 BA	16	450
2 BR/1 BA	6	550
TOTAL UNITS	22	10,500

7) Indicate whether the project meets the requirements of the City’s Vertical Mixed-Use (VMU) Ordinance, or is in a Planned-Unit Development (PUD) or Transit Oriented Development (TOD) or any other City of Austin density bonus program.

Roosevelt Gardens is not located within a VMU, PUD, or TOD; however, Roosevelt Gardens is located less than a ¼ mile from multiple bus routes and less than a ½ mile from high-frequency bus routes.



8) Indicate how the project will meet SMART Housing requirements.

Roosevelt Gardens is certified as SMART Housing.

Safe – Roosevelt Gardens is located in a high-opportunity neighborhood with a low crime rate. The redevelopment of the property will eliminate any potential safety concerns arising out of aging housing stock and will replace with an efficient, high-performing and healthy building to better serve clients.

Mixed Income – Roosevelt Gardens is to be an expansion of affordable housing in an otherwise unaffordable neighborhood. In addition, the income mix at the property provides a range from 0-50% MFI with stair-staggered levels of affordability.

Accessible – Roosevelt Gardens will be redeveloped to be accessible to its target population meeting and/or exceeding the City's minimum requirements.

Reasonably Priced – Units at Roosevelt Gardens will be leased to residents without regard to an ability to pay with the actual rental subsidy calculated through the HOPWA program (following HUD rent calculation methodology) at amounts within program limits.

Transit-Oriented – Roosevelt Gardens is located adjacent to one of the most transit-connected corridors in Austin – North Lamar Boulevard. There are several routes accessible within a ¼ mile of the property and a high-frequency route less than a ½ mile from the property.



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A2 – Project Summary
Form**

Project Summary Form

1) Project Name Roosevelt Gardens	2) Project Type 100% Affordable	3) New Construction or Rehabilitation New Construction
4) Address(s) or Location Description 5606 Roosevelt Avenue, Austin, TX 78756		5) Mobility Bond Corridor North Lamar Blvd
6) Census Tract 2.05	7) Council District District 7	8) Elementary School BRENTWOOD 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	6	12	3			21
Up to 40% MFI						0
Up to 50% MFI	6	10	3			19
Up to 60% MFI						0
Up to 80% MFI						0
Up to 120% MFI						0
No Restrictions						0
Total Units	12	22	6	0	0	40

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	4	Continuum of Care Units	0
Accessible Units for Sensory Impairments	1		

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

- 16) Is the property within 1/2 mile of an Imagine Austin Center or Corridor? Yes
- 17) Is the property within 1/4 mile of a High-Frequency Transit Stop? No
- 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>		<u>Uses</u>	
Debt		Acquisition	-
Equity		Off-Site	-
Grant	100,000	Site Work	476,989
Other	3,219,874	Sit Amenities	-
Deferred Developer Fee	679,000	Building Costs	6,774,887
Previous AHFC Funding	4,950,000	Contractor Fees	401,180
Current AHFC Request	259,925	Soft Costs	834,193
		Financing	42,550
		Developer Fees	679,000
Total \$	9,208,799	Total \$	9,208,799



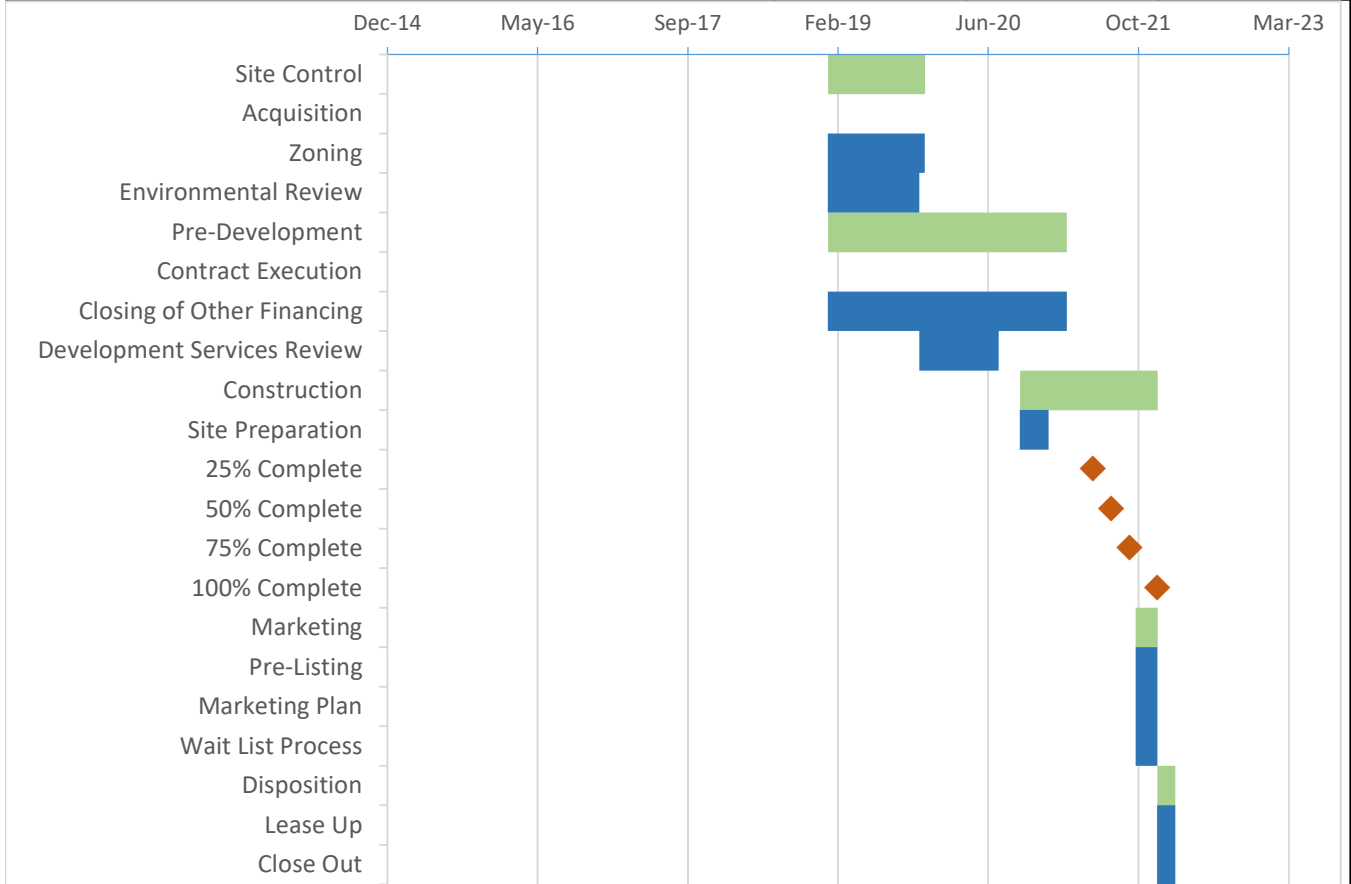
**ROOSEVELT GARDENS
AUSTIN, TEXAS**

APPLICATION TABS

Tab A3 – Project Timeline

Development Schedule

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





**ROOSEVELT GARDENS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A4 – Development
Budget**

Development Budget

	Total Project Cost	Requested AHFC Funds	Description
Pre-Development			
Appraisal	7,500		
Environmental Review	12,350		includes geotech
Engineering	21,000		
Survey	8,750		
Architectural	320,615		
Market Study	8,000		
Building Permit Fees	5,524		
Subtotal Pre-Development Cost	\$383,739	\$0	
Acquisition			
Site and/or Land	0		
Structures	0		
Other (specify)	0		
Subtotal Acquisition Cost	\$0	\$0	
Construction			
Infrastructure			
Site Work	476,989		
Demolition	281,047		
Concrete	375,740		
Masonry	48,575		
Steel	362,936		
Rough Carpentry	887,700		
Finish Carpentry	97,007		
Waterproofing and Insulation	158,090		
Roofing and Sheet Metal	112,854		
Plumbing/Hot Water	949,588		
HVAC/Mechanical	703,770		
Electrical	770,710		
Doors/Windows/Glass	235,417		
Lath and Plaster/Drywall and Acoustical	210,755		
Tiel Work			
Soft and Hard Floor	105,000		
Paint/Decorating/Blinds/Shades	228,810		
Specialties/Special Equipment	63,640		
Cabinetry/Appliances/Counters	288,875		
Carpet			
Elevator	67,116		
Other (specify) project-specific req, insurance, CM fee, bond, general conditions	917,365		
CHANGE ORDER #1 - lumber	235,625	235,625	
Construction Contingency	75,447		
Subtotal Construction Cost	\$7,653,056	\$235,625	
Soft & Carrying Costs			
Legal	0		
Audit/Accounting	0		
Title/Recordin	50,000		
Architectural (Inspections)	0		
Construction Interest	6,040		
Construction Period Insurance	0		
Loan Closing and Fees	6,510		
Relocation	42,846		
Marketing	0		
Davis-Bacon Monitoring	0		
Developer Fee	679,000		
Other: Addtl. Commissioning	24,300	24,300	
Other: FFE, sub-metering, Austin Energy, water quality fee, wiring	218,600		
Other (specify) consultant fees, letter of credit fee, app fee, operating reserve,	144,708		
Subtotal Soft & Carrying Costs	\$1,172,004	\$24,300	
TOTAL PROJECT BUDGET	\$9,208,799	\$259,925	



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

APPLICATION TABS

**Tab A5 – Operating
Proforma**

This pro forma represents a conventional affordable housing development - this pro forma was run with rental income at the set-aside rent limits and the project carrying debt at a 1.20 DCR.

15 Year Rental Housing Operating Pro Forma (RHDA)

The pro forma should be based on the operating income and expense information for the base year (first year of stabilized occupancy using today's best estimates of market rents, restricted rents, rental income and expenses), and principal and interest debt service. The Department uses an annual growth rate of 2% for income and 3% for expenses. Written explanation for any deviations from these growth rates or for assumptions other than straight-line growth made during the proforma period should be attached to this exhibit.

INCOME	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 10	YEAR 15
POTENTIAL GROSS ANNUAL RENTAL INCOME	\$353,676	\$360,750	\$367,965	\$375,324	\$382,830	\$443,805	\$514,492
Secondary Income	\$5,352	\$5,459	\$5,568	\$5,680	\$5,793	\$6,716	\$7,786
POTENTIAL GROSS ANNUAL INCOME	\$359,028	\$366,209	\$373,533	\$381,003	\$388,623	\$450,521	\$522,277
Provision for Vacancy & Collection Loss	-\$17,951	-\$18,310	-\$18,677	-\$19,050	-\$19,431	-\$22,526	-\$26,114
Rental Concessions	\$0	\$0	\$0	\$0	\$0	\$0	\$0
EFFECTIVE GROSS ANNUAL INCOME	\$341,077	\$347,898	\$354,856	\$361,953	\$369,192	\$427,995	\$496,164
EXPENSES							
General & Administrative Expenses	\$23,334	\$23,801	\$24,277	\$24,762	\$25,257	\$27,886	\$30,789
Management Fee	\$18,001	\$18,361	\$18,728	\$19,103	\$19,485	\$21,513	\$23,752
Payroll, Payroll Tax & Employee Benefits	\$55,777	\$56,893	\$58,030	\$59,191	\$60,375	\$66,659	\$73,597
Repairs & Maintenance	\$35,211	\$35,915	\$36,634	\$37,366	\$38,114	\$42,080	\$46,460
Electric & Gas Utilities	\$13,812	\$14,088	\$14,370	\$14,657	\$14,951	\$16,507	\$18,225
Water, Sewer & Trash Utilities	\$17,718	\$18,072	\$18,434	\$18,802	\$19,179	\$21,175	\$23,379
Annual Property Insurance Premiums	\$17,784	\$18,140	\$18,502	\$18,873	\$19,250	\$21,254	\$23,466
Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Reserve for Replacements	\$10,000	\$10,200	\$10,404	\$10,612	\$10,824	\$11,951	\$13,195
Other Expenses	\$714	\$728	\$743	\$758	\$773	\$853	\$942
TOTAL ANNUAL EXPENSES	\$192,351	\$196,198	\$200,122	\$204,124	\$208,207	\$229,877	\$253,803
NET OPERATING INCOME	\$148,726	\$151,700	\$154,734	\$157,829	\$160,985	\$198,118	\$242,360
DEBT SERVICE							
First Deed of Trust Annual Loan Payment	\$123,938	\$123,938	\$123,938	\$123,938	\$123,938	\$123,938	\$123,938
Second Deed of Trust Annual Loan Payment	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Third Deed of Trust Annual Loan Payment	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Annual Required Payment	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Annual Required Payment	\$0	\$0	\$0	\$0	\$0	\$0	\$0
ANNUAL NET CASH FLOW	\$24,788	\$27,762	\$30,796	\$33,891	\$37,047	\$74,180	\$118,422
CUMULATIVE NET CASH FLOW	\$24,788	\$52,550	\$83,346	\$117,237	\$154,284	\$432,352	\$913,858
Debt Coverage Ratio	1.20	1.22	1.25	1.27	1.30	1.60	1.96



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

APPLICATION TABS

Tab A6 – Scoring Sheet

This scoring sheet represents Roosevelt Garden's score with the ACTUAL pro forma that is unique to HOPWA-funded projects. The project is not able to get the DCR points due to its unique structure as Supportive Housing.

Project Name	Roosevelt Gardens	
Project Type	100% Affordable	
Council District	District 7	
Census Tract	2.05	
Prior AHFC Funding	\$4,950,000	
Current AHFC Funding Request Amount	\$259,925	
Estimated Total Project Cost	\$9,208,799	
High Opportunity	No	
High Displacement Risk	NO	
High Frequency Transit	No	
Imagine Austin	Yes	
Mobility Bond Corridor	North Lamar Blvd	
SCORING ELEMENTS		Description
UNITS		
< 20% MFI	0	# of rental units at < 20% MFI
< 30% MFI	21	# 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% 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	8%	% of City's affordable housing goal within mobility bond corridors
SCORE	4	% of annual goal * units * 50%, max of 75
< 40% MFI	0	# of rental units at < 40% MFI
< 50% MFI	19	# 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% 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	8%	% of City's affordable housing goal within mobility bond corridors
SCORE	2	% 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% 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	8%	% 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% 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	8%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 25%, max of 75
Unit Score	7	MAXIMUM SCORE = 300
INITIATIVES AND PRIORITIES		
Continuum of Care	0	Total # of units provided up to 100 per year
Continuum of Care Score	0	(total CoC Units/100 + HF Units/50)*20
Access to Healthy Food	Yes	Within 1 Mile of Healthy Food (City GIS)
Continuum of Care Weighted Score	0	Mobility, Access to Jobs, Community Institutions, Social Cohesion
2 Bedroom Units	6	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	3	Multi-bedroom Unit/Total Units * 20
TEA Grade	86	Elementary School Rating from TEA
Multi-Generational Housing Weighted Score	1	Educational Attainment, Environment, Community Institutions, Social Cohesion, E
Accessible Units	5	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	7	MAXIMUM SCORE = 200
UNDERWRITING		
AHFC Leverage	57%	% of total project cost funded through AHFC request
Leverage Score	0	3 points per 5% reduction in leverage below 50% (max 30)
AHFC Per Unit Subsidy (including prior amounts)	\$130,248	Amount of assistance per unit
Subsidy per unit score	9	(\$200,000 - per unit subsidy)*25/\$200,000
AHFC Per Bedroom Subsidy	\$113,259	Amount of assistance per bedroom
Subsidy per Bedroom Score	11	(\$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	20	MAXIMUM SCORE = 100
APPLICANT		
FINAL QUANTITATIVE SCORE	34	THRESHOLD SCORE = 50
Previous Developments		
Compliance Score		
Proposal		
Supportive Services		
Development Team		
Management Team		
Notes		

This scoring sheet represents Roosevelt Garden's score if it were a conventional affordable housing community. It would score above threshold. This is simply not equitable when Roosevelt Gardens is intensely supportive housing with all units below 50% MFI.

Project Name	Roosevelt Gardens	
Project Type	100% Affordable	
Council District	District 7	
Census Tract	2.05	
Prior AHFC Funding	\$4,950,000	
Current AHFC Funding Request Amount	\$259,925	
Estimated Total Project Cost	\$9,208,799	
High Opportunity	No	
High Displacement Risk	NO	
High Frequency Transit	No	
Imagine Austin	Yes	
Mobility Bond Corridor	North Lamar Blvd	
SCORING ELEMENTS		Description
UNITS		
< 20% MFI	0	# of rental units at < 20% MFI
< 30% MFI	21	# 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% 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	8%	% of City's affordable housing goal within mobility bond corridors
SCORE	4	% of annual goal * units * 50%, max of 75
< 40% MFI	0	# of rental units at < 40% MFI
< 50% MFI	19	# 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% 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	8%	% of City's affordable housing goal within mobility bond corridors
SCORE	2	% 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% of City's affordable housing goal near high frequency transit
Imagine Austin	15%	% of City's affordable housing goal in imagine austin corridors
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Mobility Bond Corridor	8%	% 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	0%	% of City's affordable housing goal to reduce displacement
High Frequency Transit	0%	% of City's affordable housing goal near high frequency transit
Imagine Austin	15%	% of City's affordable housing goal in imagine austin corridors
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Mobility Bond Corridor	8%	% of City's affordable housing goal within mobility bond corridors
SCORE	0	% of annual goal * units * 25%, max of 75
Unit Score	7	MAXIMUM SCORE = 300
INITIATIVES AND PRIORITIES		
Continuum of Care	0	Total # of units provided up to 100 per year
Continuum of Care Score	0	(total CoC Units/100 + HF Units/50)*20
Access to Healthy Food	Yes	Within 1 Mile of Healthy Food (City GIS)
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2 Bedroom Units	6	Total Affordable 2 Bedroom units
3 Bedroom Units	0	Total Affordable 3 Bedroom units
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Multi-Generational Housing Score	3	Multi-bedroom Unit/Total Units * 20
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Multi-Generational Housing Weighted Score	1	Educational Attainment, Environment, Community Institutions, Social Cohesion, E
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Accessibility Weighted Score	1	Housing Stability, Health, Mobility, Community Institutions
Initiatives and Priorities Score	7	MAXIMUM SCORE = 200
UNDERWRITING		
AHFC Leverage	57%	% of total project cost funded through AHFC request
Leverage Score	0	3 points per 5% reduction in leverage below 50% (max 30)
AHFC Per Unit Subsidy (including prior amounts)	\$130,248	Amount of assistance per unit
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Subsidy per Bedroom Score	11	(\$200,000 - per bedroom subsidy)*25/\$200,000
Debt Coverage Ratio (Year 5)	1.30	Measured at the 5 Year mark
Debt Coverage Ratio Score	20.1081408	Minimum = 1.0; Maximum = 1.5; 1.25 = best score
Underwriting Score	40	MAXIMUM SCORE = 100
APPLICANT		
FINAL QUANTITATIVE SCORE	54	THRESHOLD SCORE = 50
Previous Developments		
Compliance Score		
Proposal		
Supportive Services		
Development Team		
Management Team		
Notes		



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 1 – Entity Information

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



Developer 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 – 22 units – Project Transitions has owned and operated since 1995
Highland Terrace – 7107 Guadalupe – 8 units – Project Transitions has owned and operated since 1998
- **Community Housing Program:** PT provides subsidized rent assistance and support services for those living offsite.
- **Support Services:** The critical pairing of housing to support services is the magic behind PT's work. PT offers an exhaustive list of wrap-around social services to help clients on the journey to independent living and recovery.

In 2019, the City of Austin only had the 30 units above to meet the needs of more than 1,500 people with HIV in the community who are experiencing homelessness or who are housing unstable. In partnership with the City of Austin, Project Transitions stepped up to meet this need.

Roosevelt Gardens broke ground in January 2021 and will be the redevelopment of PT's existing property, nearly doubling its size to provide a total of 40 units of stable, supportive, affordable housing exclusively for people with HIV. A second planned development in 2021 – Burnet Place Apartments - will add another 61 units, bringing PT's total by the end of 2022 to 109 total units dedicated to individuals and families affected by HIV/AIDS. Please see attached brochure illustrating Project Transitions' progress toward this commitment. Please see attached 2019 Annual Report for Project Transitions, Inc. to learn more about the work of the organization.



Applicant Capacity

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

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

i.) Project Management:

Jennifer Hicks has assembled a well-qualified and committed development team including architect, engineer and general contractor. Mitch Weynand, as Owner Representative, has provided a direct link between the third-party design and construction professionals and PT Board and Staff.

ii.) Market Analysis:

A market analysis is a routine part of the pre-development and feasibility of projects. Bob Coe with Affordable Housing Analysts is well-regarded in the affordable housing industry, is on TDHCA list of approved market analysts and completed the market study for Roosevelt Gardens.

iii.) Site Selection and Control:

Jennifer Hicks has 20 years of site selection experience. Sites are selected based on a variety of factors including current funding priorities and appropriateness for the target population. Hicks works with private, third party brokers to locate sites. In the case of Roosevelt Gardens, the property is already owned by PT.



iv) Planning and Construction:

Jennifer Hicks has coordinated the engagement of a third-party general contractor who has been a part of the project from the beginning. From experience, time and money is saved by having a high-quality general contractor engaged through the design process. Braun and Butler has been engaged as General Contractor for this project.

v) Design, Architecture and Engineering:

Jennifer Hicks has coordinated the engagement of an engineer – Civiltude LLC - and architect – hatch ulland owen architects - to lead the re-development of Roosevelt Gardens. A cohesive and experienced architecture and engineer team is critical to the overall project success. The team assembled have worked with each other on numerous other affordable housing developments.

vi) Legal and Accounting:

Legal services are being provided on as-needed basis when real estate documents necessitate review. PT retains a pro-bono attorney through Holland and Knight LLP who is able to review and comment on documents. All accounting is performed in-house by Madge Whistler, Chief Operation and Financial Officer. Audits are currently performed by Montemayor Britton Bender PC.

vii) Federal Funding Rules:

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

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

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



**ROOSEVELT GARDENS
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 May 06, 2021.



A handwritten signature in black ink, appearing to read "Ruth R. Hughs".

Ruth R. Hughs
Secretary of State



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 1 – Entity Information

1c. Statement of Confidence



Statement of Confidence

N/A

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



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 2 – Principals Info

2a. Resumes of principals



RESUMES OF PRINCIPALS

Cynthia Herrera, Chief Executive Officer of Project Transitions, Inc., is a driven, creative, and compassionate leader, who utilizes her legal skills as an attorney to advocate for whole person and whole community wellness.

Prior to her hiring as the CEO of Project Transitions in 2019, Cynthia restlessly advocated for survivors of domestic violence, stalking, and sexual assault as an attorney with the Texas Advocacy Project. She spearheaded an initiative to partner with local health providers to identify and prevent ongoing intimate-partner violence against their patients.

She graduated from Loyola University Chicago, School of Law with a Juris Doctor and a Certificate in Health Law from the Beazley Institute for Health Law and Policy, ranked the second health law program in the nation. Cynthia's interest in public health began as a psychology major, when she served as a volunteer at The University of Michigan Law School Pediatric Advocacy Initiative.

She then had the opportunity to hone her skills in public health and legal advocacy as a student attorney at the award-winning medical-legal partnership, Health Justice Project, representing clients to eradicate health-harming legal issues involving landlord-tenants issues, including mass eviction, and detrimental housing conditions, including hazardous mold infestation.

In 2014, Cynthia relocated to Austin, Texas and served as an investigator of housing discrimination claims for the State of Texas, ensuring that Texans were not evicted or unfairly treated based on race, color, national origin, religion, sex, familial status, or disability.

Since arriving in Austin, Cynthia has established a free community legal clinic with patients of Community Health Empowerment and trained hundreds of health providers on how the upstream medical-legal partnership model of patient-client care saves money, time, & lives. In 2018, she was published in the Texas Family Physician magazine.

Her community involvement includes serving on the Access to Quality Health Care Committee of the Travis County Adolescent Health Collaborative to ensure youth-centered, quality healthcare for all young people in Travis County and Co-Chair of the Public Awareness Committee for the Austin Travis County Family Violence Task Force.



Today, as CEO of Project Transitions, Cynthia is spearheading a \$3.5M capital campaign to triple the number of affordable and supportive housing units reserved for Central Texas living with HIV and struggling with homelessness. The multi-million-dollar, two-phase property development project is part of a community-wide effort to end the HIV epidemic and bring home, health, & hope to those in need living at the intersect of Austin's dual crises of HIV + homelessness.

Madge Whistler is Chief Financial Officer/Chief Operations Officer for Project Transitions, Inc., supporting the day-to-day program operations and long-term goals of the agency.

Ms. Whistler brings an energetic focus to the organizational workflow of the firm. She works closely with the CEO, Board of Directors, staff, and external partners in moving the PT ecosystem towards its ambitious goals.

Immersed in the technology cultures of Research Triangle Park, Route 128, Silicon Valley and Austin, Ms. Whistler leverages a broad base of business and project management experience in software, hardware and professional services.

As a long-time downtown Austin resident, Ms. Whistler is actively involved with commercial and civic organizations that support the growth and quality of downtown Austin's vibrant, creative and entrepreneurial culture.

Ms. Whistler is a graduate of the University of North Carolina at Chapel Hill where she received her BS in Business Administration.

CYNTHIA Y. HERRERA

1404 MANFORD HILL DRIVE • AUSTIN, TX 78753 • 512.450.2444
CYHERRERA@OUTLOOK.COM

BAR ADMISSION

STATE BAR OF TEXAS, 2013

EDUCATION

LOYOLA UNIVERSITY CHICAGO, SCHOOL OF LAW, Chicago, IL

J.D., *Certificate in Public Interest*, 2013

- HNBA 17th Annual Uvaldo Herrera Moot Court Competition, *National Runner-up*
- Public Interest Law Society (“PILS”) Exemplary Public Interest Achievement Award
- Dean’s List, *Fall 2011, Spring 2012, Summer 2012, Fall 2012, Spring 2013*

BEAZLEY INSTITUTE FOR HEALTH LAW AND POLICY, Chicago, IL

Certificate in Health Law, 2013

- Student Attorney at the Health Justice Project, an award-winning medical-legal partnership clinic
- Studied topics in Health Law, including HIPPA, Affordable Care Act, etc.

UNIVERSITY OF MICHIGAN, Ann Arbor, MI

B.A., *Psychology*, 2006

EXPERIENCE

PROJECT TRANSITIONS, Austin, TX

Chief Executive Officer, 2019 - Present

- Responsible for the overall strategy and operations for agency’s staff, programs, expansion, and execution of its mission.
- Acting Director of Communications.
- Acting Director of Development.
- Acting Director of Capital Campaigns.

TEXAS ADVOCACY PROJECT, Austin, TX

Attorney, 2015 - 2019

- Pioneering the establishment and development of Medical-Legal Partnerships with local health providers to eradicate health-harming legal issues, involving housing, employment, education, and family law.
- Contributing to grant writing applications resulting in over \$70,000 in grant funds secured.
- Directly representing clients in protective order applications and family law matters.
- Counseling and preparing court pleadings and instructions for Assisted Pro Se program clients.
- Providing legal advice via Legal Line consultations regarding various legal issues including family law, housing, and protective orders.
- Providing and developing legal and subject-matter trainings to community members, stakeholders, health providers, and attorneys.

TEXAS WORKFORCE COMMISSION, CIVIL RIGHTS DIVISION, Austin, TX

Civil Rights Investigator III - Housing, 2014-2015

- Conducted entire investigations of complaints of discrimination under the Fair Housing Act.
- Analyzed findings to make a determination of cause in accordance with statute.
- Acted as a conciliator to resolve complaints of discrimination between parties.

HEALTH JUSTICE PROJECT, BEAZLEY INSTITUTE FOR HEALTH LAW AND POLICY, Chicago, IL

Student Attorney – Housing Team, *Spring* 2013

- Represented clients within an award-winning medical-legal partnership, eradicating health-harming legal issues involving landlord-tenants issues, including mass eviction and detrimental housing conditions, such as hazardous mold infestation.
- Trained health providers on screening for health-harming legal needs.

LEGAL ASSISTANCE FOUNDATION OF METROPOLITAN CHICAGO (LAF), Chicago, IL

PILI Legal Intern - Public Benefits Practice Group, *Summer* 2012

- Conducted client intake interviews to screen for public benefits legal matters.
- Conducted legal research and wrote legal memoranda on employment discrimination, medical deportations, and public benefits matters.

AMERICAN CIVIL LIBERTIES UNION OF ILLINOIS (ACLU), Chicago, IL

PILI Legal Intern, *Spring* 2012

- Conducted legal research and wrote legal memoranda on civil rights issues.
- Researched and contributed to “Know Your Rights” materials.

CAPABILITIES PROFILE

- Strong Public Speaker - Experienced training presenter and public speaker. Skilled court orator at the trial and appellate levels.
- Servant Leader – Utilizes listening, empathy, stewardship, foresight, persuasion conceptualization, awareness, healing, commitment to the growth and development of people, and building community to advance mission.
- Program Developer - Demonstrated ability to envision, initiate, and develop new and innovative programming to advance community wellness with upstream solutions.
- Effective Networker - Proven ability to forge new networks and partnerships, by breaking through silos and securing buy-in from interdisciplinary professionals.
- Effective Grant Writer - Concise and effective writer with a proven ability to attract and secure new funds and partner in kind contributions.
- Systems Optimizer - Creates organization, efficiencies, and consistency in systems. Ability to design and implement systems for tracking deliverables for grant funding.
- Community Engagement Specialist – Spearheads creative community outreach by reaching people where they are by partnering with existing community access points.
- Creative and Enthusiastic Marketer – Utilizes social media platforms and graphic design to reach the wider community, with a vision to employ podcasting and video content for greater reach and engagement.
- Proficient Spanish Speaker - Ability to read, write, and speak Spanish in a functionally proficient capacity.
- Legislative Researcher, Writer, & Advocate - Experienced in legislative research and writing, including interpretation of proposed legislation, drafting of legislation fact sheets, and legislative recommendations and advocacy.

PUBLICATIONS

- *My Patients Are Affected by Intimate-Partner Violence - and Yours Are Too!*, Co-author, Texas Family Physician, Vol. 69, No. 4 (2018).
- *Improving Illinois' Response To Sexual Offenses Committed By Youth, Recommendations For Law, Policy, And Practice*, Contributor, Illinois Juvenile Justice Commission, A report to the Governor and General Assembly pursuant to Public Act 097-0163 (2014).
- *True Equality in Illinois Education: Will This Be the Year?* (Feature), Public Interest Law Reporter, Issue 17.2 (2012).
- *Outsourcing Liability: Are the True Causes of Unemployment Hiding Behind the Corporate Veil?* (Feature), Public Interest Law Reporter, Issue 17.1 (2011).

TASK FORCES & COMMITTEES

- Travis County Adolescent Health Collaborative, Access to Quality Health Care Committee
- Austin/Travis County Family Violence Task Force (ATCFVTF), Public Awareness Co-Chair
- Texas Medical-Legal Partnership Coalition

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



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

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



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 2 – Principals Info

2b. Resumes of Development Team



DEVELOPMENT TEAM

Project Transitions has engaged the following high-quality development team to oversee the re-development of Roosevelt Gardens:

- | | |
|---|---|
| 1) Development and Financing Consultant: | Jennifer Hicks with True Casa Consulting, LLC |
| 2) Architect: | Jason Haskins, hatch, ulland owen architects |
| 3) Civil Engineer: | Civilitude, LLC |
| 4) General Contractor: | Braun and Butler Construction |
| 5) Owner Representative: | Mitch Weynand |
| 6) Property Manager: | Project Transitions, Inc. |

Please see attached documentation of experience for team members listed above. Each team member has vast experience in the development of affordable housing and intimate familiarity with the funding sources scheduled for this project.



	Name and Contact Information	MBE?	WBE ?	NP?
Owner	Cynthia Herrera, Chief Executive Officer, Project Transitions, Inc. – 7101 Woodrow Avenue, Austin, TX 78757 (512) 454-8646 finance@projecttransitions.org			X
Development and Finance Consultant	Jennifer Hicks, Owner of True Casa Consulting, 3000 Skylark Drive, Austin, TX 78757 (512) 203-4417 jennifer@truecasa.net		X	
Architect	Jason Haskins, hatch + ulland owen architects, 1010 East 11 th Street, Austin, TX 78702 (512) 293-2460 jasonhaskins@huoarchitects.com			
Engineer	Civiltude, 5110 Lancaster Court, Austin, TX 78723 (512) 761-6161 fayez@civiltude.com	X		
General Contractor	Braun and Butler Construction, 300 Hazelwood St. Ste. 100, Leander, TX 78641 (512) 560-1783 blauterjung@braun-butler.com			
Owner Representative	Mitch Weynand, 13004 Arroyo Doble Dr., Manchaca, Texas, 78652 (512) 496-7135 mitchweynand@yahoo.com			
Property Management Provider	Cynthia Herrera, Chief Executive Officer, Project Transitions, Inc. – 7101 Woodrow Avenue, Austin, TX 78757 (512) 454-8646 finance@projecttransitions.org			x
Other: Supportive Services Providers	Cynthia Herrera, Chief Executive Officer, Project Transitions, Inc. – 7101 Woodrow Avenue, Austin, TX 78757 (512) 454-8646 finance@projecttransitions.org			x

TRUE CASA CONSULTING, LLC

Bio for Jennifer Hicks, Founder:

Jennifer Hicks has over 20 years of affordable housing development and finance experience working for Foundation Communities - the State's premier nonprofit, affordable housing developer. As Director of Housing Finance, Hicks led the development of 14 innovative and high-impact communities that provided 1,559 units of affordable housing. While at Foundation Communities, Hicks also helped create and implement the first supportive housing model in Austin and grew the model to 783 units before her departure. 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. 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 2,200 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 12 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 \$10M in grant awards from the Federal Home Loan Bank Affordable Housing Program in 12 awards – application, underwriting, subsidy draw and initial compliance monitoring.
- 24) Securing gap funding from a variety of funding sources including: City of Austin Rental Housing Development Assistance Program, TDHCA Multifamily Direct Loan Program and Capital Magnet Fund.
- 25) Ensuring construction stays on timeline and meets any funder required deadlines (i.e. HTC PIS deadline.)
- 26) Leading the construction draw requests to construction lender and equity provider.
- 27) Ensuring all tax credit equity is drawn according to agreed upon milestones.
- 28) Coordinating with property management on lease-ups for HTC projects.
- 29) Structuring housing vouchers in new developments.
- 30) Designing supportive housing models based on site and project parameters.
- 31) Tracking project stabilization and leading the conversion to permanent mortgage.
- 32) Facilitating the refinancing of six different communities and preserving affordability.
- 33) Coordinating the Year 15 response on HTC financed communities.
- 34) Leading the closing on land acquisition and all project financing including coordinating the closing team and responding to due diligence calls from lender and investor.
- 35) Creating a compliance checklist that details all funder requirements for ongoing operations.

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Project	New or Rehab	# of Units	Project Type	Financing	Year 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 Saint 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	Under Construction	All units below 30% MFI
Garden Terrace, Austin, TX	Rehab/New	123	Supportive Housing	City of Austin RHDA funding, FHLB AHP, TDHCA HOME, Section 8 Moderate Rehabilitation SRO Program	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	New	20	Seniors	TDHCA MFDL, FHLB AHP	Under Development	20 units at 30% 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
Live Oak Trails, Austin, TX	New	58	Family Supportive Housing	9% LIHTC, City of Austin RHDA Program, Department of Justice Funds	2017	12 units – 30% MFI 12 units – 40% MFI 34 units – 50% MFI

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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 Construction	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 Construction	16	Family	City of Austin RHDA	Under Construction	
Waterloo Studios, Austin, TX	New Construction	132	Supportive Housing	9% LIHTC and City of Austin RHDA Program	2020	26 units – 30% MFI 26 units – 40% MFI 80 units – 50% MFI

QUALIFICATIONS: FIRM PROFILE



ABOUT US

hatch + ulland owen architects (h+uo) is an Austin, Texas based architectural firm focused on creating visionary, sustainable and socially-responsible design.

The firm was founded in 1978 by Tom Hatch, FAIA, with a commitment to help build strong, vibrant communities. It has evolved over several decades from its sole-proprietorship beginnings to its current partnership structure when, in 2006, Erik Ulland and Randall Owen joined him as partners. Our keen sense of community values has inspired a wide range of distinctive projects including, numerous multi-family communities for neighborhood non-profits including, Guadalupe Neighborhood Development Corporation; Foundation Communities; and Atlantic Housing Foundation as well as market rate developers. Some noteworthy projects include: 65 Whole Foods Markets across the country, including the original WFM Corporate Headquarters at 6th and Lamar; The Crossings (now Miraval Resort and Spa); The Groves Information Center, Pavilion & Pool; Threadgill's; Antone's; Twin Oaks Library; Oak Point Park in Plano; numerous single-family residences; multiple amenity centers; as well as farm worker housing in the valley and in the panhandle.

h+uo architects has a passion for projects of this type that celebrate affordable housing. We recently completed multiple communities for Foundation Communities, and two affordable housing developments in Charleston, South Carolina (330-units & 336-units), as well as another 128-unit complex in Austin. The homes that we relocated from Rainey Street to Father Joe Zonata and renovated are part of Guadalupe Neighborhood Development Corporation's affordable housing program and are stunning. We are currently working on a number of projects for Foundation Communities, Guadalupe Neighborhood Development Corporation and have just begun developments with Austin Habitat For Humanity and Project Transitions.

A dynamic design studio featuring a wealth of architectural expertise, h+uo prides itself on interpreting our clients' visions and delivering high quality, contextually responsive design in the Multi-family residential, Hospitality, Retail, Office, Community / Civic, Education, and Single-family residential markets. The culture of the firm, our reputation in Austin, throughout Texas and around the country, as well as the growing list of satisfied and repeat clients continues to thrive.



Jason John Paul Haskins AIA, LEED AP BD+C, NCARB

Director of Architecture



PROJECT ROLE: Project Architect + Project Manager

Jason's professional practice focuses on enacting and embodying solidarity, subsidiarity, and human dignity in the built environment particularly as it applies to building solutions for equitable access to sustainable housing. He brings a wide range of experience in socially and technically complex projects to his work. Participatory design, multi-disciplinary planning, emerging technologies, and data-driven design play a significant role in his process. Jason's diverse experience includes a stint as a development analyst & project manager for mixed-use, family-friendly, and deeply-affordable housing. His knowledge of all aspects of the development and construction process brings opportunities for creative solutions to persistent problems. He has also been a digital asset librarian, computer programmer, and noise-musician.

EDUCATION

Master of Architecture
University of Texas at Austin, 2010
B.S. in Architectural Studies
University of Texas at Austin, 2004

REGISTRATION & CREDENTIALS

TX # 26615 (2018), NCARB Cert. # 124535
LEED AP BD+C, GBCI # 0010774836

EXPERIENCE

hatch + ulland owen architects
Austin, Texas (2018-present)
bercy chen studio / Cambrian Development
Austin, Texas (2016-2018)
NBBJ
Seattle, Washington (2004-2006)

ORGANIZATIONAL AFFILIATIONS

American Institute of Architects, Member
MidTexMod Chapter of domomomo_us, Board Member
AIA Interfaith Design, Leadership Group
Texas Association of Affordable Housing Providers

REPRESENTATIVE PROJECTS

Roosevelt Gardens • Austin, Texas

New affordable supportive housing of 40 units for Project Transitions, a local non-profit who provides housing and comprehensive support services to people with HIV and AIDS. 550 sf micro units are supplemented by generous community and support spaces in a compact building tucked into its neighborhood. Roosevelt Gardens was the first contracted Affordability Unlocked project.





Faye Kazi, PE, LEED AP

President, Civiltude LLC Engineers & Planners Established 2010

Mr. Kazi has over 20 years of experience providing public and private sector clients with entitlements and the design, management and construction of site development projects. Mr. Kazi has worked on projects as small as ADA improvement projects to complex site development and roadway projects. Mr. Kazi brings a unique combination of technological savvy, professional service, technical knowledge and enthusiastic commitment to his clients. His strengths also include a deep understanding of the permitting process, environmental sensitivities, grading and drainage as demonstrated by the list of selected projects below:

Project Experience

Guadalupe-Saldana Netzero Subdivision – GNDC – Austin, Texas

Project Principal & Project Manager for 90-unit fully affordable detached condominium and single-family Netzero development in East Austin. Design included flood plain modeling and modification, low-impact development techniques such as raingardens and biofiltration pond.

Trails at Vintage Creek – Foundation Communities – Austin, Texas

Project Principal on four separate contracts addressing stormwater inlet & drainage analysis to replace storm inlets; water utility design, construction documents and contract administration to upgrade water meter connections and provide adequate fire flow to site; structural retaining wall design of 700 LF at 9' height immediately adjacent to occupied units; and field survey of wastewater flow-lines to assist plumbing repairs. The water utility and retaining wall projects required Site Plan Exemptions and involved Fire Dept, Water Utility, and building review.

Sierra Vista Apartments – Foundation Communities – Austin, Texas

Project Principal on three separate contracts beginning with a tree & topographical survey of 9-acre tract with existing multi-family apartment units. The survey was used to provide a report with profiles of the accessible paths and sections at every 5' to help identify non-compliant slopes. Involvement led to preparation of well plugging plan and permitting through the Barton Springs Edwards Aquifer Conservation District for a 4' wide, 37' deep unrecorded well on the property. Currently developing construction plans for sidewalk & grading to provide ADA accessibility and improve drainage. Design includes 315 LF stormwater line & area inlets and site improvements for proposed Learning Center.

EDUCATION

MS Engineering
BS Architectural Engineering
The University of Texas at Austin

Professional Development Workshop
- Analysis, Design & Rehabilitation of
Underground Pipelines

REGISTRATIONS

Licensed Professional Engineer
Texas PE# 96489
LEED Accredited Professional

AFFILIATIONS

Chair, Planning Commission Adjunct
Faculty, Department of Civil,
Architectural & Environmental Engineer-
ing at UT Austin
Ex Vice Chair, Zero Waste Advisory
Commission
Real Estate Council of Austin Board
Austin Asian Chamber Board
Ex-chair South Congress Combined



Nhat M. Ho, PE, LEED Green Associate

Vice President, Civiltude LLC Engineers & Planners

Mr. Ho brings over seven years of versatile experience from different areas of architectural design, civil and structural engineering, Revit modeling and production drafting. His integrated civil and structural knowledge ranges from stormwater management system, wet utilities, sports running track to retaining structures, buildings spatial arrangement and site integration. His land development experience includes site feasibility studies, zoning change, subdivisions, and commercial site plans. He has cultivated relationship and reputation with review staff, especially at City of Austin, for effective and responsible design. His in-depth expertise includes utilities, innovative water quality management and site plan accelerated permitting. Specifically with RRISD & AISD, Mr. Ho has extensive knowledge with the interlocal agreement and dedicated review team that handles school projects at City of Austin.

EDUCATION

BS Architectural Engineering
The University of Texas at Austin

REGISTRATIONS

Licensed Professional Engineer
Texas PE #119194
LEED Green Associate

AFFILIATIONS & INVOLVEMENT

Water & Wastewater Commissioner
COA Joint Sustainability Committee
Chair of Mueller Neighborhood Association
City of Austin CodeNEXT
Real Estate Council of Austin
Greater Austin Asian Chamber of Commerce
Downtown Austin Alliance
South Congress Combined Neighborhood Contact Team

Project Experience

Trails at Vintage Creek – Foundation Communities – Austin, Texas

Design Engineer on two separate contracts for water utility improvement and construction documents to upgrade water meter connections and a structural retaining wall design. Responsibilities include working with Austin Fire Department, Austin Water Utility, and commercial building inspectors, preparing construction plans, spoils calculation, and specifications for reuse of elevated pathways.

Sierra Vista Apartments – Foundation Communities – Austin, Texas

Field Engineer responsible for quantifying soil volume and dynamic cost estimate for contract work required to plug a 4' wide, 37' deep unrecorded well discovered on the property. Work also included site investigation, coordination with licensed well driller, and on-field direct response regarding material and procedure of the plugging process.

Greenwater Redevelopment – Trammel Crow – Austin, Texas

Project Manager designing utility infrastructure to serve the redevelopment of the former Green Water Treatment Plant. Responsible for producing water, wastewater and chilled water construction documents and obtaining development permits with Austin Water Utility and Austin Energy on an ac-

Company Information



About Braun & Butler

Since 1982, **Braun & Butler Construction** has been providing Central Texas with Commercial General Contracting and Construction Management services. Our clients include federal, state, county, local municipalities, educational and religious institutions, medical facilities, financial institutions, charitable organizations, technical manufacturers, and other private entities. At Braun & Butler, we firmly believe that we “**build better together.**” Our staff is committed to quality and safety on every project, thus delivering the best value to the Owner. Many owners and architects alike depend on our services as their contractor of choice because of our expertise, past performance, and integrated approach in General Contracting and Construction Management can ensure a collaborative, successful project.

Headquarters – Leander Office

300 Hazelwood St., Ste. 100
Leander, Texas 78641

Westlake Office

1715 S. Capital of Texas Hwy., Ste. 100
Austin, Texas 78746

Main Telephone: (512) 837-2882

Fax: (512) 837-5115

Email: construction@braun-butler.com

Ownership Information

S-Corporation, established March 31, 1982 in the state of Texas

Texas Vendor Identification Number

17422207534

Contact Person: Brian Lauterjung, Executive Vice President

Main Telephone: (512) 837-2882

Mobile: (512) 560-1783

Email: blauterjung@braun-butler.com

Construction Manager Services

Preconstruction and Construction services include, but not limited to:

- ✓ Preparation of budgets at all major design milestones
- ✓ Preparation of budgets for alternative systems for team evaluation
- ✓ Preparation of guaranteed maximum price budget
- ✓ Preparation of schedules at all design milestones
- ✓ Preparation and enforcement of construction schedule
- ✓ Plan completeness/quality reviews at major milestones
- ✓ Identification, tracking, and mitigation of safety concerns
- ✓ Enforcement of a safe work site
- ✓ Attend all design meetings, regardless of impact
- ✓ Public notice requirements for bidding
- ✓ Subcontractor solicitation
- ✓ Constructability reviews
- ✓ Contract administration
- ✓ Submittal reviews
- ✓ Quality control
- ✓ Weekly project meetings with design team
- ✓ Weekly project meetings with subcontractors
- ✓ Issuance of weekly project updates
- ✓ Preparation of pay applications with complete subcontractor backup

Brian Lauterjung

Executive Vice President



Brian graduated from The University of Texas at Austin in 1996 with a Bachelor of Business Administration degree in Finance. Immediately following graduation Brian worked for JPI in Irving, Texas. His initial role was in the construction accounting department, and he completed his employment in the Asset Management group as a financial analyst. Brian began working for Rizzo Construction as a project manager in January of 1999. He gained experience managing a wide range of projects, from tenant finish out to ground up construction, and in March 2018 he became President of Rizzo Construction. Brian's experience, leadership, and affable personality have allowed him to build strong, lasting relationships with clients, local architects and engineers, and subcontractors and vendors. His knowledge and commitment to safety make him an invaluable asset to the projects he leads. After Rizzo Construction's merger with Braun & Butler in October 2019, Brian became the Executive Vice President.

As Executive Vice President, Brian's duties include Director of the Westlake office, new business development, working with Owners and design teams during pre-construction, project cost estimating, negotiating contracts with Owners and Subcontractors, developing operational procedures, strategic initiatives and assisting the CEO with running the company.

QUICK FACTS

Industry Experience:
22 years

Years with Company:
22 years

Education:
The University of Texas,
Austin, BBA & Finance

City of Residence:
Austin, TX

Certifications:
✓ OSHA 30-hour
Construction Safety
& Health
✓ CPR & First Aid

ARCHITECT/ENGINEER REFERENCES

Enviroplan Architects
Rick Canales
☎: (512) 476-0622
✉: rick@enviroplan-architects.com

Spencer + Pierce
Architecture & Interiors
Bo Spencer
☎: (512) 476-0622
✉: bo@sp-ai.com

Pickett, Kelm & Associates
Gary Pickett
☎: (512) 474-8548
✉: gpickett@pkainc.com

PROJECT EXPERIENCE

YMCA of Austin – Mr. James Finck, ☎: (512) 236-9622, ✉: james.finck@austinyymca.org	
❖ Springs Family YMCA (Dripping Springs, TX)	\$5,520,000
❖ Hays Communities YMCA (Buda, TX)	\$2,830,000
❖ Northwest Family YMCA – (Austin, TX)	\$932,000
❖ Hays Communities YMCA (Buda, TX)	\$768,000
❖ Southwest Family YMCA (Austin, TX)	\$5,440,000
Foundation Communities – Mrs. Vicki McDonald, ☎: (512) 447-2026, ✉: vicki.mcdonald@foundcom.org	
❖ Garden Terrace Phase III (Austin, TX)	\$2,590,000
❖ Skyline Terrace (Austin, TX)	\$3,470,000
❖ Spring Terrace (Austin, TX)	\$460,000
❖ Sierra Vista Apartments (Austin, TX)	\$7,140,000
❖ Garden Terrace Phase I (Austin, TX)	\$1,300,000
Ironwood Real Estate – Mr. Scot Krieger ☎: (512) 477-2224, ✉: skrieger@ironwoodre.com	
❖ 207 San Jacinto (Austin, TX)	\$2,270,000
❖ Ironwood Real Estate office (Austin, TX)	\$385,000
❖ Parkline Lot 2B Shell building (Austin, TX)	\$500,000
❖ Burn Boot Camp (Round Rock, TX)	\$87,000
❖ Pure Austin Fitness (Austin, TX)	\$2,360,000
The Catholic Diocese of Austin – Mr. Pat Baker, ☎: (512) 949-2400, ✉: patrick-baker@austindiocese.org	
❖ Shepherds Gate Chapel (Buda, TX)	\$1,480,000
❖ St. Austin Catholic School – Art Room addition (Austin, TX)	\$539,000
❖ St. Ferdinand Catholic Church (Blanco, TX)	\$1,260,000
❖ Santa Cruz Phase V – Administration building addition (Buda, TX)	\$2,040,000
❖ St. John's Parish Activity Center addition (San Marcos, TX)	\$1,060,000
Accessible Housing of Austin (AHA) – Mrs. Jolene Keene, ☎: (512) 640-7781, ✉: jolene.keene@ahaustin.org	
❖ AHA @ Briarcliff (Austin, TX)	\$4,700,000
Four T Realty – Mrs. Taylor Steed, ☎: (512) 590-7737, ✉: taylor.steed@fourtrealty.com	
❖ 4404 Williams Drive Shell building (Georgetown, TX)	\$1,830,000
❖ 9511 N Lamar shell building renovation (Austin, TX)	\$253,000
Olympia Hills Gymnastics – Mr. Jeff Beal, ☎: (512) 295-3073, ✉: jeffdbdeal@aol.com	
❖ New 15,000 sf gymnastics facility with full site improvements (Buda, TX)	\$1,270,000
Pioneer Bank – Ron Coben, ☎: (713) 581-1100, ✉: n/a	
❖ Dripping Springs Branch/Headquarters (Dripping Springs, TX)	\$2,230,000
❖ San Marcos Branch (San Marcos, TX)	\$1,780,000
Omni Bank – Chip Kerrigan, ☎: (713) 747-9000, ✉: n/a	
❖ Cedar Park Branch (Cedar Park, TX)	\$1,490,000
❖ Lakeway Branch (Austin, TX)	\$450,000
❖ Greenspoint Branch (Houston, TX)	\$600,000



RESPONSIBILITY	
✓	PRIMARY
x	SECONDARY

Management Roles & Responsibility Chart

TASK	VICE PRESIDENT OF PRECONSTRUCTION	PROJECT MANAGER	PROJECT SUPERINTENDENT	
ESTIMATING	✓	✓	x	PRECONSTRUCTION SERVICES
VALUE ENGINEERING	✓	✓	x	
DOCUMENT REVIEW	✓	✓	x	
MATERIAL SPECS/LEAD TIMES	x	x	✓	
CONSTRUCTABILITY REVIEWS	x	x	✓	
SUBS PREQUALIFICATION	✓	x	x	
PROJECT ACCOUNTING	x	✓	x	
PREPARE BID PACKAGES	✓	x	x	
BID ANALYSIS	✓	x	x	
PRELIMINARY SCHEDULING	x	✓	x	
PREPARE SUBCONTRACTS	x	✓	x	CONSTRUCTION MANAGEMENT
REVIEW AND MONITOR SHOP DRAWINGS		x	✓	
EXPEDITE MATERIALS		x	x	
FINAL SCHEDULE		✓	x	
LOOK AHEAD SCHEDULES		x	✓	
COST AND BUDGET REPORTS		✓	x	
WEEKLY STATUS REPORTS		✓	x	
CONDUCT TEAM/OWNER MEETINGS		✓	x	
FF&E COORDINATION		x	✓	
PAY APPLICATIONS		✓	x	
RECORD KEEPING & MAINTENANCE		✓	x	FIELD SUPERVISION
CHANGE ORDER MANAGEMENT		✓	x	
CLOSE-OUT		✓	x	
ZERO DEFECT-PUNCHLIST		x	✓	
JOBSITE SAFETY		x	✓	
LAYOUT & STAGING		x	✓	
PHASING & SEQUENCING		x	✓	
EQUIPMENT SELECTION		x	✓	
FIELD PERSONNEL		x	✓	
DAILY FIELD OPERATIONS		x	✓	
SHOP DRAWING FIELD CHECK		x	✓	
SUBMITTAL LOG		✓	x	
PAYROLL & FIELD RECORDS		x	✓	
PROGRESS MEETINGS		✓	x	
FOREMAN MEETINGS		x	✓	
MAINTAIN CRITICAL PATH SCHEDULE		✓	x	
EQUIPMENT TRAINING		x	✓	
ZERO DEFECT-PUNCHLIST		x	✓	

AHA! @ Briarcliff

Austin, Texas (Job #11919)

AHA! stands for Accessible Housing Austin! The mission is to provide affordable, accessible, integrated housing for low-income people with disabilities. It is the only non-profit in Austin led by members of the disability community. AHA! at Briarcliff is a 27-unit wood-framed apartment complex that consists of 2 three-story wood-framed buildings. Each apartment is 100% ADA accessible. There are 15 one-bedroom units, 12 two-bedroom units, an on-site laundry room, a manager's office, and a community room. Each building has a separate elevator. There are elevated walkways that connect the two buildings, so if one of the elevators is out of service, the other is available. The site for the project was going to be the second phase of the neighboring single-story apartment complex. Due to the lot size and location, we faced a few difficulties throughout the project's construction. The small size of the lot created limited space for material storage and a job trailer. Due to this limited space, the scheduling of subcontractors and materials deliveries had to be carefully considered to ensure adequate working space. Each building's footprint was designed from a setback line to a setback line to maximize the number of apartments.

Owner

Accessible Housing Austin!
Jolene Keene
(512) 640-7781
Jolene.keene@ahaustin.org

Architect

Austin Community Design and Development Center
Michael Gatto
(512) 220-4254
Michael.gatto@acddc.org

Delivery Method

Construction Manager at Risk

Contract Amount

\$4,850,040

Substantial Completion

1/22/2021

Size

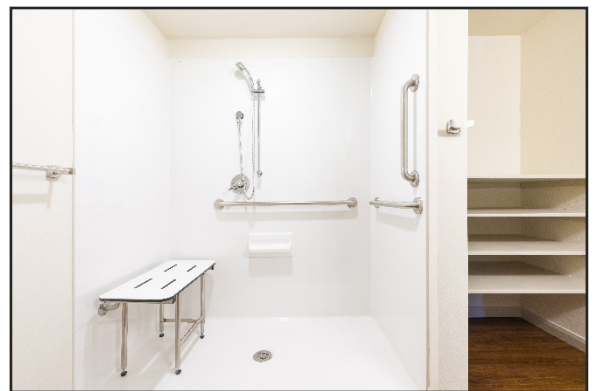
24,000 SF

Project Manager

Jon Hunter

Superintendent

Nathan Stanford



Braun & Butler Construction, Inc.
Project Highlight v.2021

Development Experience

Mitch Weynand, Development Consultant, has a Bachelor's Degree from the University of Texas, 1975. Mr. Weynand retired from LifeWorks in January 2017 after a 40-year career and now provides consulting services to non-profit organizations primarily in property development and construction management. At LifeWorks Mr. Weynand served at the Chief Operating Officer for the past 19 years and previously for 14 as an Executive Director.

As COO responsibilities included management of all agency facilities, acquisition and development of new sites; and operational planning. He formerly supervised all housing programs as well as financial, IT, and personnel systems. Responsibilities also included participation in agency strategic management team; liaison to Board committees; grant writing, contract negotiation; facility and equipment acquisition and maintenance; cost allocations; and administrative supervision and development. Through his work at LifeWorks the agency became one of the nation's premier human service organizations with an annual budget of over \$11 million, 170 employees, 8 locations and service to over 6,000 clients per year.

Mr. Weynand's development experience includes fundraising, property acquisition, site development, design development, construction, facility deployment, and compliance. Over the past 18 years under Mr. Weynand's supervision, LifeWorks built 3 office buildings; a youth shelter and transitional living center, and a 45-unit apartment development with 29 more units in development. Activities also include property sales, commercial rental property finish-out, master leasing 20 apartments, leasing a street outreach location, and participation in the merger of 6 organizations into LifeWorks. Mr. Weynand is experienced in working with multiple federal agencies including Housing and Urban Development, Health and Human Services, and the Department of Labor. Texas state agency experience includes the Department of Family and Protective Services, the Department of State Health Services, and the Department of Development and Disability Services. Local government experience includes managing contracts with the City of Austin and Travis County Health and Human Services Departments and affordable housing construction contracts with the Austin Housing Finance Corporation.

Mitch Weynand
13004 Arroyo Doble Dr.
Manchaca, Texas 78652
512-496-7135

Education

BA Psychology, University of Texas; 1975

Attendance at numerous workshops and seminars primarily in the areas of strategic planning, financial management, cost allocations, employment law, personnel benefits, non-profit management, cultural competency, board development, grant writing, and leadership.

Professional Experience

Employed for 40 years in Austin, Texas for Youth and Family Alliance Inc, DBA LifeWorks, formerly Youth Options. Now providing consultant services in project and agency management.

Chief Operating Officer, Director of Administrative Services

July 1, 1998 to January 31, 2017

Responsible for management of all agency facilities, acquisition and development of new sites; and operational planning. Formerly supervised all housing programs, financial IT, and personnel systems. Participate in agency management team; liaison to Board committee; grant writing, contract negotiation; facility and equipment acquisition and maintenance; cost allocations; and administrative supervision and development.

Executive Director (Youth Options)

November 1984 to June 30, 1998

Responsible for all corporate activities including Board development and training; financial and program planning; management of grants and contracts; policy development; service review and evaluation; networking and community relations; personnel systems; facility and equipment acquisition and maintenance; cost allocations; vision, mission and value statement development; and management staff supervision and development.

Administrative Director (Youth Options)

1983 to 1984

Responsible for management of personnel, facilities, materials, supplies, equipment, program service standards, referral systems, data, costs, and community relations for The Emergency Shelter, The Youth and Family Resource Center, and The Transitional Living Program. Assist the Executive Director in the management of corporate activities as requested.

Program Coordinator (Youth Options)

1981 to 1983

Responsible for monitoring program compliance with all local, state and federal standards, contracts and licenses. Coordination of activities for three programs and supervision of the independent living project. Manage statistical reporting and volunteer services.

Residential Services Coordinator/Assistant Director/Case Manager/ Counselor/Activity Leader

1977 to 1981

Monitor program compliance with state licensing standards, provide skill-building classes, group counseling, and accurate reporting. Assist Director of The Emergency Shelter with all duties; manage the provision of services to adolescents in care. Provide supervision, counseling, intakes, and recreational activities for youth in The Emergency Shelter.

Other Professional Activities

Consultant and trainer to other non-profit, corporate, and public agencies; annually teach grant writing and provided team and trust building workshops, facilitated retreats, served as a peer technical assistance provider and reviewer for federal contracts, and have worked regularly as a ROPES Challenge course facilitator. These contracts have been through the following:

The Texas and Southwest Networks of Youth Services, PEAKS Adventure

The National Resource Center for Youth

The U.S. Department of Health and Human Services

Regional Network for Children

Rope Works; Community in Schools – Central Texas; Central Texas Youth Services Bureau; Travis County Juvenile Court

Related Activities

- Board Member – Controller – San Marcos Area Youth Soccer Association – Sept 2017 to present
- Austin Housing Coalition, Treasurer, since 2010
- Austin Area Human Service Association; Chair 1998, Chair Elect 1997, Treasurer 1985, Member since 1984.
- Austin Homeless Task Force Member, Ending Community Homeless Committee, 1994 to present, Chair 2006- 2007.
- Austin Area Homeless Coalition, Chair 1994.
- Licensed Child Care Administrator; December 1979 to 2000.
- Board Treasurer, Southwest Network of Youth Services; 1986 to 1993; 1998 to 2004
- Board Member (Vice Chair; Chair of Membership Services Committee), National Network for Youth; 1991 to 1993.
- Board Chairperson, Texas Network of Youth Services; 1984 to 1988.
- Life Time Achievement Award Winner, National Network for Youth, Washington D.C. 2/2008.



**ROOSEVELT GARDENS
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 Roosevelt Gardens 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.

The expanded Roosevelt Gardens will be served with the same property manager and maintenance; 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:

- Robert Eudy – Volunteer and Facilities Manager
- Todd Logan – Director of Client Services
- Julie Benziger – Housing Manager

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

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.

Robert Eudy

Akron, OH 44312

edy74756_z9r@indeedemail.com

330-221-7633

To find a job utilizing my experience in facilities maintenance, as well as furthering my education in the field.

Willing to relocate: Anywhere

Authorized to work in the US for any employer

Work Experience

Facilities Supervisor

AMETEK DYNAMIC FLUID SOLUTIONS

October 2012 to Present

- Responsible for maintaining upkeep of two properties, one commercial office building (8,000 sq ft) with 100 employees. One warehouse (47,000 sq ft). Minor repairs made with maintenance team, while larger projects are coordinated with third party contractors.
- Created and implemented ISO2016 certified shipping and receiving procedures, various OSHA and EHS corporate specific programs, and material handling and storage programs.
- Oversaw the shipping and receiving on 50 million dollars of product per year. Managed all shipping and receiving for the Ametek Kent division. Worked with customer service teams and third party logistics companies in multiple countries, insuring 100% on time deliveries and satisfaction of products to customer.
- During the Covid-19 Pandemic became the Pandemic Site Coordinator requiring the implementation of rigorous cleaning schedules and policies to keep employees safe.
- Three years of management experience.

Education

High school diploma

Skills

- Mechanically inclined and able to work through issues to figure out the root of the problem. Familiar with HVAC, Plumbing and Electrical systems/repair. Coordinating with various contractors to accomplish repairs and installs in a timely manner. Implementing and following OSHA and company specific EHS safety programs. Management and delegation. ROBERT EUDY FACILITIES MAINTENANCE 330-221-7633
- EUDY7475@GMAIL.COM AKRON, OH 44312
- Logistics
- Materials Handling
- Shipping & Receiving
- Management

- Handyman
- Root cause analysis
- Warehouse management
- Forklift

Julie Jeanine Benziger

512-818-3047 cell

juliebenziger@yahoo.com

OBJECTIVE

After moving and resigning from a wonderful position, I hope to secure a position where my vast experience and skills can be utilized while I learn, share, and expand my knowledge.

SKILLS AND QUALIFICATIONS

- ◆ More than fifteen years of supervisory experience, up to twenty employees
- ◆ Over thirteen years as a property manager including student and affordable housing communities
- ◆ Lease up experience
- ◆ New and rehab construction knowledge
- ◆ Ability to manage multiple communities with multiple programs and funding requirements
- ◆ Strong public speaking and recruiting skills
- ◆ Ability to assess needs and appropriately match them with organizational needs
- ◆ Over twenty years in counseling, teaching, training and working with individuals from various cultures, age groups, and backgrounds
- ◆ Excellent interpersonal skills, used in the development of client relationships and the motivation of both personnel and consumers
- ◆ Proven track record of resident and staff retention
- ◆ A demonstrated occupancy of 98% and above with zero delinquencies
- ◆ Age and culturally sensitive, honest and supportive, open-minded and committed
- ◆ Proficient computer skills including Microsoft Word, Microsoft Outlook, Microsoft PowerPoint working with Microsoft Access and Microsoft Excel, Internet Explorer, Netscape, OneSite and email operations
- ◆ Goal-oriented and committed to generating positive results, flexible

EDUCATION

Southwest Texas State University -San Marcos, Texas 1999-2001
Master's Degree in Sociology, Minor in Spanish – completed coursework only- *no degree awarded*

North Texas State University - Denton, Texas 1989-1993
Bachelor's Degree in Sociology, Minor in English

PROFESSIONAL EMPLOYMENT

Foundation Communities – Austin, Texas 2008 – 2018

Community Manager Trails at the Park 2015 – 2018

- Manage a 200 unit Tax Credit Property
- Meet reporting, audits, and inspection deadlines, budget expectations
- Knowledge of Federal Compliance Programs, specifically in Tax Credit funding
- Experience in affordable housing industry and working with community agencies and resources
- Maintain guidelines pertaining to income and student status eligibility
- Accounting procedures, budgeting, and monitor expenditures and all financial operations of corporation
- Complete monthly reports and sole responsibility for bill pay
- Maintain all lease files, ledgers, and vendor files
- Supervise a staff of seven

Community Manager of Arbor Terrace 2012 – 2015

- Responsible for lease up of new affordable housing community
- Manage a Single Room Occupancy community of 120 units for single homeless and/or low income adults
- Meet reporting, audits, and inspection deadlines, budget expectations
- Knowledge of Federal Compliance Programs, specifically in NSP funding

- Experience in affordable housing industry and working with community agencies and resources
- Enforce policies and procedures, report incidents, follow up thoroughly
- Accounting procedures, budgeting, and monitor expenditures and all financial operations of corporation
- Interview applicants, determine eligibility and qualify for housing
- Maintain all lease files, ledgers, and vendor files
- Directly supervise a staff of nine

Community Manager of Garden Terrace

2008 – 2012

- Manage a Single Room Occupancy community of 103 units for single homeless and/or low income adults
- Meet reporting, audits, and inspection deadlines, budget expectations
- Knowledge of Federal Compliance Programs, specifically in HOME funding
- Experience in affordable housing industry and working with community agencies and resources
- Enforce policies and procedures, report incidents, follow up thoroughly
- Accounting procedures, budgeting, and monitor expenditures and all financial operations of corporation
- Interview applicants, determine eligibility and qualify for housing
- Maintain all lease files, ledgers, and vendor files
- Directly supervise a staff of nine

Literacy Austin – Austin, Texas

2006 - 2008

Volunteer Coordinator / Recruiter

- First point of contact/response to volunteer inquiries
- Maintain database of volunteers
- Perform criminal background checks on volunteers and address issues as needed
- Offsite visits to key resources, and potential or established offsite classrooms
- Conduct volunteer orientations
- Coordinate tutor training workshops and serve as back up training facilitator
- Assist in assigning volunteers to classes by working with the Program Department
- Establish and maintain volunteer and marketing reports for funding purposes
- Attend volunteer fairs, speakers' bureaus and other events to acquaint the community with the organization and vice versa
- Schedule and coordinate volunteer recognition and appreciation events, quarterly in service trainings, and other volunteer events
- Direct marketing efforts of agencies mission, needs, and fundraising events in order to help achieve overall agency goals through press releases, website, email, and community calendars
- Work with the development department and the marketing committee to assure that fundraising efforts are adequately promoted
- Establish good rapport with volunteers and potential donors with the intent of acquiring these individuals as financial supporters
- Communicate website changes and updates with web developer
- Oversee the coordination of the agency newsletter

Wisconsin Community Services – Milwaukee, Wisconsin

2005 – 2006

Recovery Support Coordinator

- Implementation of the Wraparound Philosophy model in order to “wrap” individual services based on the unique needs, values, strengths, racial, and social structure of each individual
- Responsible for the coordination of services for a caseload consisting of ex-offenders of Re-entry and Alternative to Revocation status
- Liaison between client and service providers, the agent, and various other organizations
- Assist and facilitate the needs of the client such as housing, treatment, education, and transportation through referrals to community resources
- Organize team meetings on a monthly basis
- Develop and revise Single Care Coordination Plans and Service Authorization Requests based on the individuals needs, as well as, probation or parole requirements

Phoenix Care Systems – Milwaukee, Wisconsin

2004 – 2005

Residential Care Worker

- Perform intakes and discharges of residents of Respite Care House
- Case management, daily logs, and implementation of treatment plans
- Work in conjunction with Milwaukee County Mental Health clinicians and nurses
- Provide and maintain a therapeutic environment for residents of the Respite House
- Oversee and document medication administration, daily, and nightly activities

Community Options, Incorporated – Austin, Texas

2001 – 2004

Employment Specialist advanced to Executive Director

- Create and expand job and career opportunities for individuals with mental and physical disabilities in the competitive labor market by partnering with private industry to provide job training and placement, and career advancement services
- Senior Executive with responsibility for the strategic planning, development and management of the entire finance and administrative functions for Austin office and exclusive program
- Given full autonomy for establishing policies and procedures, defining staffing and management requirements, developing a comprehensive program, and building the entire HR infrastructure
- Launched a series of organizational development initiatives in cooperation with strategic plans for productivity improvement

LANGUAGE SKILLS

Intermediate Spanish skills – reading, writing, and speaking

CERTIFICATIONS

National Affordable Housing Management Association since 2008

Green Certified Property Manager since 2011

HUD Certified Occupancy Specialist since 2016



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3a. Federal IRS Certification

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

DEPARTMENT OF THE TREASURY

Date **APR 07 1993**

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

Employer Identification Number:
74-2502171

Contact Person:
SHARI FLOWERS

Contact Telephone Number:
(214) 767-3526

Our Letter Dated:
September 15, 1988

Addendum Applies:
No

Dear Applicant:

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

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

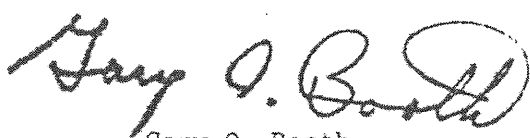
Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the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

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

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

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

Sincerely yours,



Gary O. Booth
District Director



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3b. Certified Financial Audit



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3c. Board Resolution

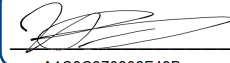
**RESOLUTION
BOARD OF DIRECTORS
Project Transitions, Inc.**

WHEREAS, **Project Transitions, Inc.**, a non-profit corporation, is redeveloping the property located at 5606 Roosevelt Avenue in Austin, Texas,

NOW, THEREFORE, BE IT RESOLVED, that the Board of Directors of **Project Transitions, Inc.** hereby authorizes Craig Davis, President, to act on behalf on **Project Transitions, Inc.** to enter into all loan and other financing agreements and related documents and to sign for and perform any and all responsibilities in relation to such agreements relating to this property.

Adopted and approved by the Board of Directors on this 23rd day of August, 2019.

PROJECT TRANSITIONS, INC.

DocuSigned by:

A1C8C370802F43B...

Joel Simmons, Secretary
Board of Directors
Project Transitions, Inc.



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3d. Financial Statements



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 3 – Financial Info

3e. Funding Commitment Letters

Financing Narrative

Roosevelt Gardens - AUSTIN, TEXAS

Construction Sources and Uses

The construction funding sources include a Multifamily Direct Loan (Soft Repayable) in the amount of \$3,000,000, a TDHCA Pre-Development Grant in the amount of \$50,000, a loan from the Austin Housing Finance Corporation (City of Austin) in the amount of \$4,950,000, a construction loan from TSAHC in the amount of \$150,088, Inc., a grant from Lola Wright Foundation in the amount of \$17,515, and a deferred developer fee in the amount of \$679,000.

This application represents an application for \$259,925 in funding from the Austin Housing Finance Corporation to primarily assist with the Covid-induced and unprecedented spike in lumber prices. Project Transitions, Inc. was awarded \$4,950,000 in General Obligation Bond funding from the Austin Housing Finance Corporation (City of Austin) on May 9, 2019. The source of funds are non-federal. Closing of the funds took place on August 30, 2019. Repayment of the loan will be deferred on a yearly basis and forgiven at the end of the loan period contingent upon compliance with the loan agreement. Please see note and deed of trust. With the current ask, the total amount of AHFC funding in the project will be \$5,209,925.

TDHCA awarded \$3,000,000 in Multifamily Direct Loan Funding under the Supportive Housing/Soft Repayable Set-Aside that closed on March 5, 2021. The funds are a deferred, forgivable loan. Funds will be used for hard construction costs.

Project Transitions, Inc. was awarded a TDHCA Pre-Development grant in the amount of \$50,000 for Roosevelt Gardens on July 25, 2020. Please see attached contract. The funds have been drawn for pre-development costs.

Project Transitions, Inc. was awarded a City of Austin Resource Recovery grant from the Brownfields Program in the amount of \$100,000. The grant was signed on July 29, 2020 and used to cover asbestos abatement prior to the demolition of the project.

TSAHC is providing a construction loan in the amount of \$150,088 to bridge fundraising during the construction period. The loan closed on March 5, 2021. The loan is interest only at 3%.

Project Transitions received a grant from the Lola Wright Foundation for \$17,515 for Roosevelt Gardens.

At this time, the developer is planning to defer all the developer fee during the construction period.

Permanent Sources and Uses

TDHCA's Multifamily Direct Loan will be used as a permanent source of funding. The term of the loan will be for 40 years at zero percent interest. Repayment of the loan will be deferred on a yearly basis and forgiven at the end of the loan period contingent upon compliance with the loan agreement.

TDHCA's Pre-Development Grant has been granted to the project and used to cover pre-development costs associated with the construction of Roosevelt Gardens.

The AHFC loan in the amount of \$4,950,000 is a permanent source of funding as will the current ask of \$259,925. Terms of the loan will be for a minimum of 40 years at zero percent interest. Repayment of the loan will be deferred on a yearly basis and forgiven at the end of the loan period contingent upon compliance with the loan agreement.

Project Transitions, Inc. was awarded a City of Austin Resource Recovery grant from the Brownfields Program in the amount of \$100,000. The grant was signed on July 29, 2020 and used to cover asbestos abatement prior to the demolition of the project.

Project Transitions, Inc. is making a permanent commitment of \$150,088 in fundraising sources already secured for the project by a private donor.

Project Transitions, Inc. will permanently defer \$679,000 of the developer fee in order to complete the development of Roosevelt Gardens.



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4a. Market Study



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4b. Good Neighbor Policy



Good Neighbor Policy

ROOSEVELT GARDENS

5606 Roosevelt Avenue
Austin, TX 78756

CONTACT

Madge Whistler, Chief Operations and Financial Officer
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 Neighborhood that surrounds Roosevelt Gardens for the past 30 years and cherishes their existing relationship with neighbors, donors and volunteers that live in the neighborhood. 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 5606 Roosevelt Avenue, Austin, 78756:

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.

Brentwood Neighborhood Association
Brentwood Neighborhood Plan Contact Team

- 1) **Neighborhood Contact:** Project Transitions has already reached out to the priority neighborhood organization(s) to share info on plans for the redevelopment of Roosevelt Gardens. Those meetings took place in February-May 2019 when a zoning change was being pursued before Affordability Unlocked was passed.
- 2) **Neighborhood Notification** - Notifications were sent out to property owners for the zoning change request for the redevelopment of Roosevelt Gardens before Affordability Unlocked was pursued and



a zoning change was no longer necessary. PT met with the Brentwood Neighborhood Association several times to discuss the proposed zoning change and garner support. Notifications were also sent out for the two TDHCA MFDL applications submitted on August 14, 2019 and July 31, 2020.

- 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 had board members with lived experience present at the meetings.
- PT has created 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 were 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.

City of Austin Good Neighbor Checklist

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

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

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

(1) Preliminary Research

Review the Neighborhood Plan (if applicable)

(2) Neighborhood Notification

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

(3) Pre-Application Engagement

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

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

(4) Application requirements

Provide communications plan

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

Provide signed copy of this checklist.

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

Cynthia Y. Herrera
Signed

Cynthia Y. Herrera
printed name

05/07/2021
date



**ROOSEVELT GARDENS
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

February 21, 2019 (Revision to letter dated February 06, 2019)

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

Project Transitions, Inc. –Roosevelt Gardens – 5606 Roosevelt – (Project ID 637)

TO WHOM IT MAY CONCERN:

Project Transitions, Inc. (development contact: Jennifer Hicks: 512-203-4417; jennifer@truecasa.net) is planning to redevelop Roosevelt Gardens into a **40 unit multi-family** development at 5606 Roosevelt Avenue, Austin TX 78756. The project is subject to a minimum 5 year affordability period after issuance of certificate of occupancy, unless project funding requirements are longer.

The applicant has submitted evidence of contacting the Brentwood Neighborhood Association asking to attend their March 2019 meeting to discuss their project.

This revision adds Neighborhood Plan Amendment Fee to the list of eligible fees to be waived.

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@austinenenergy.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
Melanie Montez, ORS Mashell Smith, ORS



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 4 – Project Info

4d. MOU with ECHO – N/A



**ROOSEVELT GARDENS
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 Roosevelt Gardens 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. Roosevelt Gardens proposes to serve 40 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; 50% will be 1-person households; 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 (one being Roosevelt Gardens) and a Community Housing Program that provides subsidized rent assistance and support services for those living off-site.

iv. External service provider – N/A

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



Please find attached resumes for the following key personnel involved in the delivery of services at Roosevelt Gardens:

- Todd Logan – Director of Client Services
- Lupe Gonzales – Housing Program Coordinator
- Mandy Goerger – Senior Housing Specialist

vi. Financial capacity of the Services provider:

- a. 3-Year Service budget for Roosevelt Gardens is attached.

TODD LOGAN, LMSW

1801 LAVACA #7-K, AUSTIN, TEXAS 78701

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

EDUCATION

UNIVERSITY OF TEXAS, AUSTIN
UNIVERSITY OF SOUTH FLORIDA

Masters, Social Work, 1993
Bachelors, Sociology, 1983

KNOWLEDGE AND SKILLS

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

EXPERIENCE

Director of Client Services, April 2016 to present

PROJECT TRANSITIONS, INC.

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

Mandy Goerger

Pflugerville, TX 78660

mandygoerger2_a8v@indeedemail.com

512-560-0717

Eagerly seeking the opportunity to share my energy, positive attitude, organizational skills, creativity, compassion, and other attributes by attaining a position at this esteemed establishment.

#readytowork

Authorized to work in the US for any employer

Work Experience

Case Manager & Intake Counselor Intern

Bluebonnet Trails Community Services - Round Rock, TX

October 2014 to Present

Delivered and administered Skills Training, Psycho-Education, Assessments, Intake Evaluations, and Therapeutic Interventions/Techniques to persons in services.

Dance Instructor/Performer/Choreographer/Creative Director

Shirley Mcphail School of Dance — Austin, TX

Dance Elements-Pflugerville, TX

Director/Founder of Professional Performance Company overseeing all aspects of business; payroll, booking, production and client centered performance content for troupe of 7-62 people varying by season and demand.

Created mentorship/psycho-educational workshop for adolescents using dance as a therapeutic intervention.

Personal Assistant to Private Practicing Psychotherapist

Stewart Gallas - Austin, TX

January 2010 to September 2017

Managed sensitive information with discretion while providing administrative support.

Education

Master of Arts in Professional Counseling

Texas State University — Round Rock - Round Rock, TX

2020

Bachelor of Science in Social Psychology

Texas State University Counseling Clinic individuals - Austin, TX

2012

Associate of Science in Human Services

Skills

- Rooted in Ethics
- Compassionate
- Dedicated
- Strong communication skills
- Management skills
- Performance background
- Relationship building
- Concept development
- Adaptable
- Focused
- Takes Initiative/Proactive
- Workshop supervision
- Safety understanding
- Team player
- Dancing
- Case Management
- Crisis Intervention
- Individual / Group Counseling
- Personal Assistant Experience
- Behavioral Health
- Social Work
- Infection Control Training
- Group Therapy
- Addiction Counseling
- Behavioral Therapy
- Motivational Interviewing
- Intake Experience
- Crisis Management
- Mental Health Counseling

Certifications and Licenses

Mental Health First Aid (MHFA), CPR/First Aid, Active Armed Shooter Training, PESI Telehealth Training, Satori Alternatives to Managing Aggression (SAMA), Abuse & Neglect: What to Look for and How to Respond, Workplace Emergencies and Natural Disasters, Workplace Safety, HIPPA, Infection Control, Corporate Compliance and Ethics, Medicare/Medicaid Fraud and Abuse, Client/Patients' Rights Training

September 2019 to September 2020

Assessments

Case Management & Social Work — Familiar

May 2020

Prioritizing case tasks, gathering information, and providing services without judgment.

Full results: https://share.indeedassessments.com/share_to_profile/fdb5593a1125f04cc3f829f55f97da3beed53dc074545cb7

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

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.

Supportive Service Budget**Roosevelt Gardens****Sources**

	<u>Year 1</u>	<u>Year 2</u>	<u>Year 3</u>	<u>Total</u>
HOPWA (Housing Opportunities for People with HIV/AIDS)	\$241,900	\$249,157	\$256,632	\$747,689
Private Fundraising - Grants	\$10,150	\$10,455	\$10,769	\$31,374
Private Fundraising - Individual Donors	\$9,900	\$10,197	\$10,503	\$30,600
Thrift Shop Revenue	\$22,654	\$23,334	\$24,034	\$70,022
TOTAL SOURCES	\$284,604	\$293,143	\$301,938	\$879,685

Uses

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



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5a. Appraisal



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

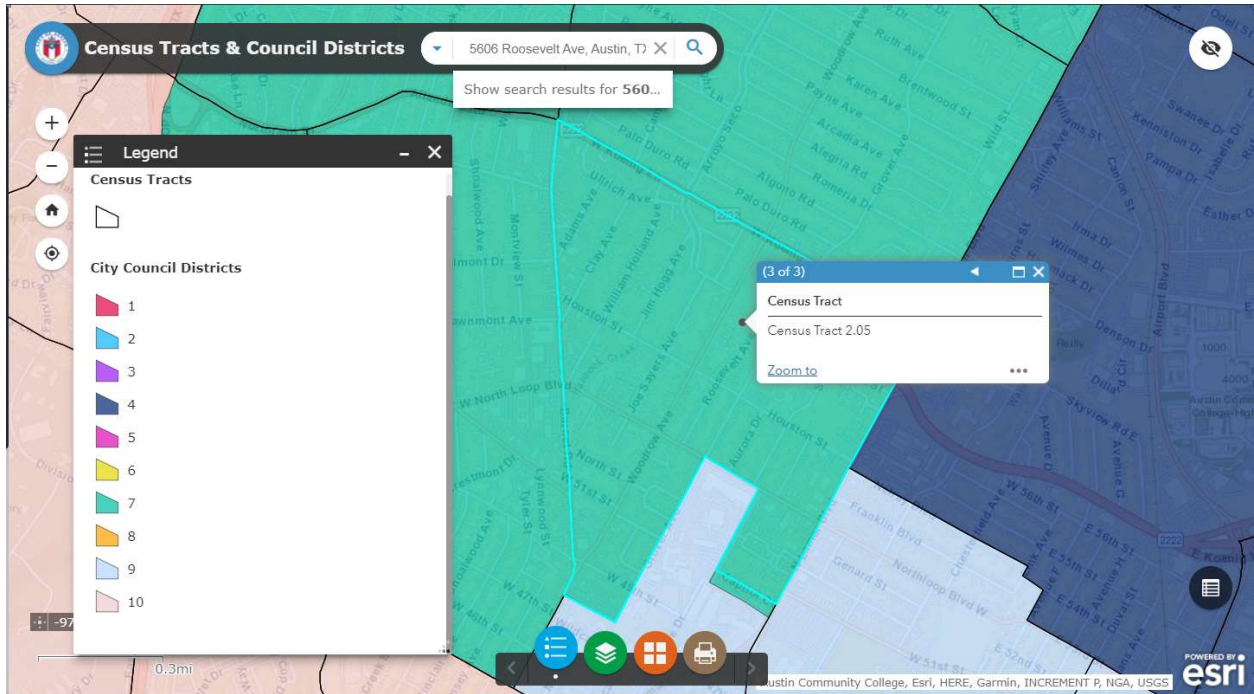
ATTACHMENT TABS

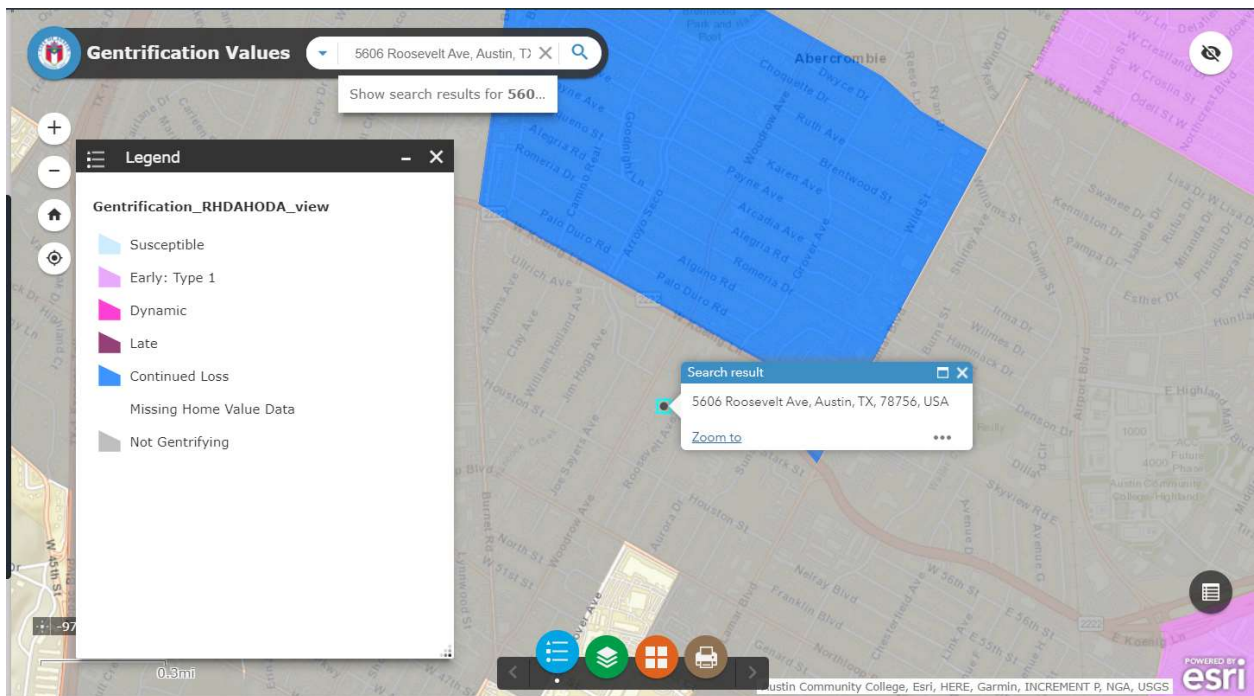
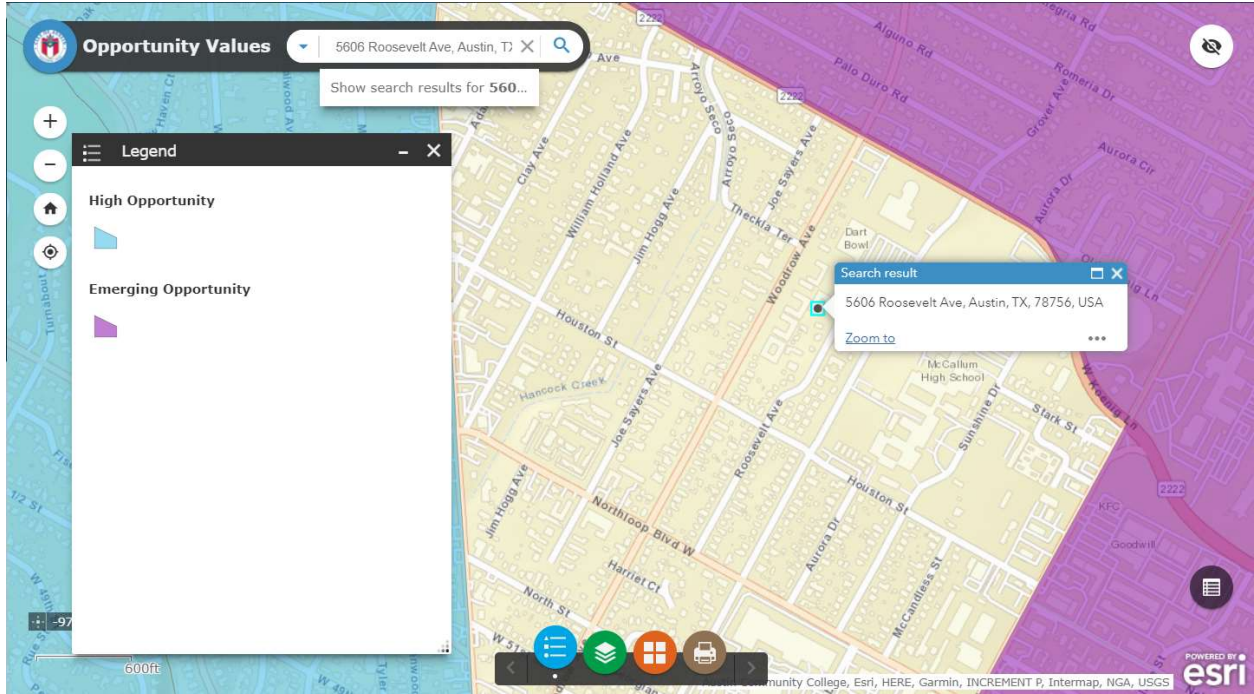
Attachment 5 – Property Info

5b. Property Maps



PROPERTY MAPS







Imagine Austin & Mobility Corridors 5606 Roosevelt Ave, Austin, TX

Show search results for 560...

Legend

- 2016 Mobility Bond Corridor Projects
 - Construction Eligible Corridor
 - - - Preliminary Engineering and Design
- Mobility Bond Corridor: 1/2-Mile Buffer
- Imagine Austin Center: 1/2-Mile Buffer
- Imagine Austin Corridor: 1/2-Mile Buffer

(2 of 4)
Activity Corridor: 1/2-Mile
Burnet Road
Zoom to

-97.744 30.331 Degrees
600ft

Esri, HERE, Garmin, INCREMENT P, Intermap, NGA, USGS | City of Aust... **esri**



Imagine Austin & Mobility Corridors 506 Roosevelt Ave, Austin, TX

Show search results for 560...

Legend

- 2016 Mobility Bond Corridor Projects**
 - Construction Eligible Corridor
 - - Preliminary Engineering and Design
- Mobility Bond Corridor: 1/2-Mile Buffer**
- Imagine Austin Center: 1/2-Mile Buffer**
- Imagine Austin Corridor: 1/2-Mile Buffer**

(3 of 4)
Activity Corridor: 1/2-Mile
Lamar Boulevard
[Zoom to](#)

-97.746 30.332 Degrees
600ft

Esri, HERE, Garmin, INCREMENT P, Intermap, NGA, USGS | City of Aust... **esri**



Imagine Austin & Mobility Corridors 5606 Roosevelt Ave, Austin, TX X

Show search results for 560...

Legend

- 2016 Mobility Bond Corridor Projects**
 - Construction Eligible Corridor
 - - Preliminary Engineering and Design
- Mobility Bond Corridor: 1/2-Mile Buffer**
- Imagine Austin Center: 1/2-Mile Buffer**
- Imagine Austin Corridor: 1/2-Mile Buffer**

(4 of 4)
Mobility Bond Corridor: 1/2-Mi Buffer
N. Lamar / Guadalupe
Zoom to

-97.736 30.320 Degrees
600ft

Esri, HERE, Garmin, INCREMENT P, Intermap, NGA, USGS | City of Aust...



The screenshot displays the Esri Transit web application interface. At the top, a search bar contains the text "5606 Roosevelt Ave, Austin, TX" and a magnifying glass icon. Below the search bar, a dropdown menu shows "Show search results for 560...". On the left side, a legend window is open, listing two items: "High Frequency Bus Routes: 1/4-Mile Buffer" with a purple square icon, and "Bus Routes: 3/4-Mile Buffer" with a blue square icon. A search result popup is visible on the map, displaying "5606 Roosevelt Ave, Austin, TX, 78756, USA" and a "Zoom to" button. The map shows a street grid with labels for "Woodrow Ave", "Roosevelt Ave", and "Grover Ave". A purple shaded area on the right side of the map indicates the 1/4-mile buffer zone, and a blue shaded area indicates the 3/4-mile buffer zone. The bottom of the interface includes a scale bar (200ft), a coordinate display (-97.736 30.329 Degrees), and a footer with the text "Austin Community College, Esri, HERE, Garmin, INCREMENT P, NGA, USGS" and the Esri logo.



Healthy Food 5606 Roosevelt Ave, Austin, TX X Q

Show search results for 560...

Legend

- Healthy Food
- Healthy Food Retail Locations

Search result

5606 Roosevelt Ave, Austin, TX, 78756, USA

Zoom to

600ft

POWERED BY **esri**

Community College, Esri, HERE, Garmin, INCREMENT P, Intermap, NGA, USGS



Elementary School Attendance Zones 5606 Roosevelt Ave, Austin, TX

Show search results for 560...

Legend

Austin Elementary School Attendance Areas

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

(2 of 2)

Austin Elementary School Attendance Areas

Independent School District: Austin
Independent School District
Elementary School Name: Brentwood
Elementary

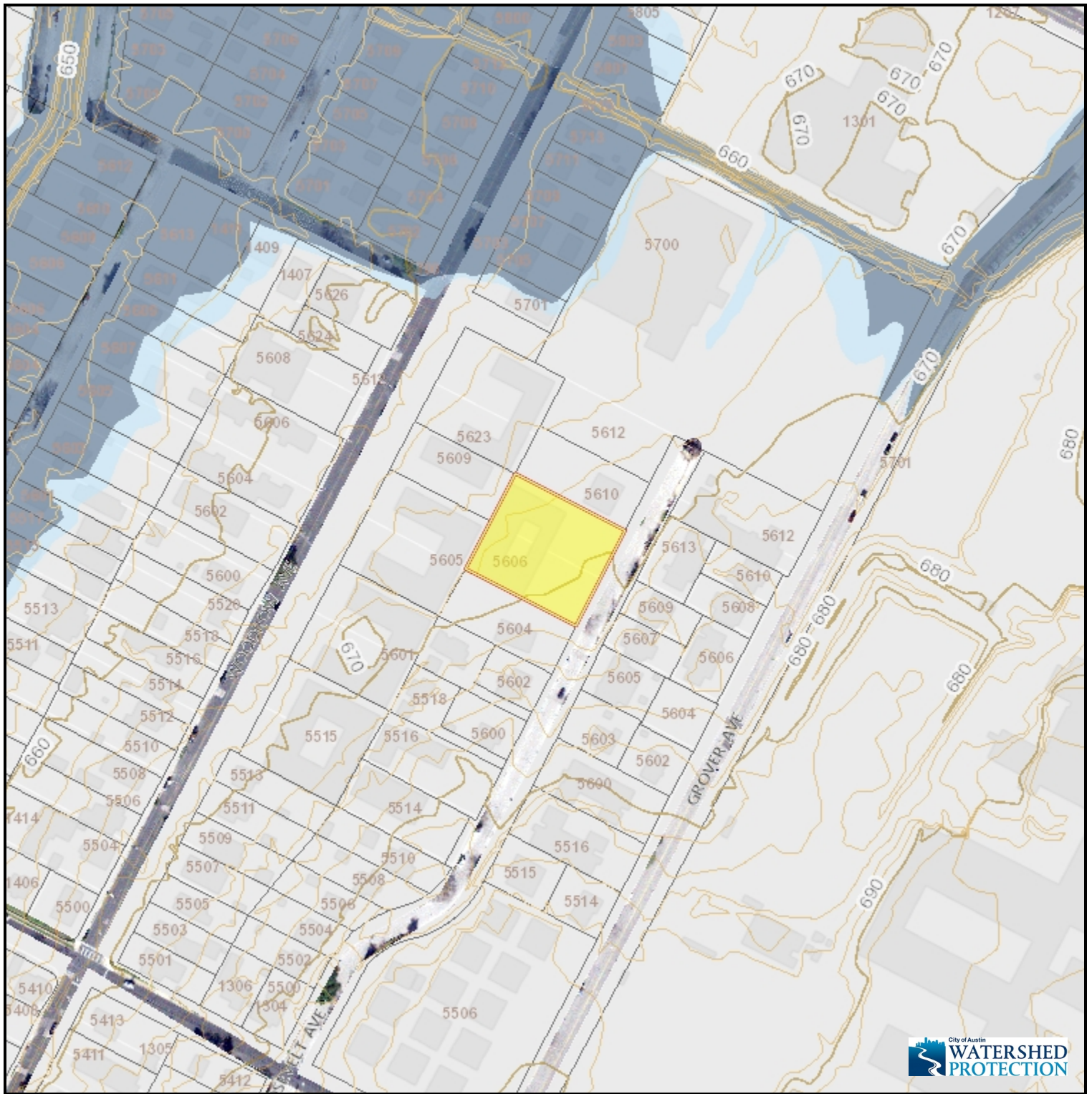
[Zoom to](#)

+ -97.727 30.322 Degrees

600ft

Community College, Esri, HERE, Garmin, INCREMENT P, Intermap, NGA, USGS

POWERED BY **esri**



FEMA Floodplains

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.

0 200 400 Feet



Prepared: 5/6/2021

	Address
	Contour
	Index
	Intermediate
	Parcel
FEMA Floodplain	
	100 Year (Detailed-AE)
	100 year (Shallow-AO)
	100 Year (Approx-A)
	X Protected by Levee
	500 Year
	Outside Austin City Limits





**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5c. Zoning Verification Letter



City of Austin

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

Neighborhood Housing and Community Development Department

July 29, 2020

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

Re: Zoning Verification for the Property located at 5606 Roosevelt Avenue, Austin, Travis County, Texas more particularly described as LOTS 12 AND 13, BLOCK 15, OF BROADACRES, A SUBDIVISION IN TRAVIS COUNTY, TEXAS, ACCORDING TO THE MAP OR PLAT THEREOF RECORDED IN VOLUME 3, PAGE 135 OF THE PLAT RECORDS OF TRAVIS COUNTY, TEXAS, SAVE AND EXCEPT THE EAST 10 FEET CONVEYED TO THE CITY OF AUSTIN AS DESCRIBED IN VOLUME 700, PAGE 104, OF THE DEED RECORDS OF TRAVIS, COUNTY, TEXAS.

Dear Ms. Hicks:

This letter is to confirm that the property located at 5606 Roosevelt, Austin, Texas is zoned MF-3-NP.

Under the MF-3-NP classification applicable to this property, multi-family residential development is permitted. This site applied for and was certified under Affordability Unlocked (AU) – a residential affordable housing development bonus program passed by Ordinance No. 20190509-027. An AU 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, Senior Planner
Neighborhood Housing and Community Development



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5d. Proof of Site Control

After recording, return to:
Title Agency of Austin
3305 Northland Drive
Suite 100
Austin, Texas 78731
GF # 94115440-9

Parcel # 2-2806-0823

FILM CODE
00005241256

159

WARRANTY DEED WITH VENDOR'S LIEN

DATE: Executed to be effective January 1, 1995

4:39 PM 01/01/95

9.00 INDY
01/01/95

GRANTOR: Whitney Partnership, a Texas general partnership

4:35 PM 01/01/95

5.00 RECH
01/01/95

GRANTOR'S MAILING ADDRESS: 2105 Justin Lane, Suite 101, Austin, Travis
County, Texas 78757

4:39 PM 01/01/95

1.00 SEC
01/01/95
140.95-CHK#

GRANTEE: Project Transitions, Inc., a not for profit Texas corporation

GRANTEE'S MAILING ADDRESS: P. O. Box 4826, Austin, Travis County, Texas
78765

CONSIDERATION:

\$10.00 and other valuable consideration, receipt of which is hereby acknowledged, and two notes of even date executed by Grantee, which will be described in this paragraph and referred to as the first lien note and second lien note. The first lien note is in the principal amount of \$190,000.00, and is payable to the order of NationsBank of Texas, N. A. The first lien note is secured by the first and superior vendor's lien and superior title retained in this deed for NationsBank of Texas, N. A. and is also secured by a first lien deed of trust of even date from Grantee to Michael F. Hord, Trustee. The second lien note is in the principal amount of \$240,000.00, and payable to the order of City of Austin, a Texas home-rule city and municipal corporation. The second lien note is secured by the second, subordinate, and inferior vendor's lien retained in this deed and by a second lien deed of trust of even date from Grantee to William R. Cook, Trustee.

PROPERTY (including any improvements):

Lots Twelve (12) and Thirteen (13), Block "15", BROADACRES, an addition to the City of Austin, Travis County, Texas, according to the map or plat thereof recorded in Volume 3, Page 135, Plat Records of Travis County, Texas, SAVE, LESS AND EXCEPT therefrom, however, the East ten feet (10') of said lots conveyed to the City of Austin for street purposes by Warranty Deed recorded in Volume 700, Page 104, Deed Records of Travis County, Texas.

RESERVATIONS FROM AND EXCEPTIONS TO CONVEYANCE AND WARRANTY:

1. Restrictions recorded in Volume 489, Page 607 and Volume 895, Page 135, both Deed Records of Travis County, Texas.
2. Visible and apparent easements on or across the property herein described.
3. Rights of parties in possession.
4. 5' electric and telephone lines easement granted to the City of Austin, recorded in Volume 3759, Page 1801, Deed Records of Travis County, Texas.
5. Rights of tenants in possession, as tenants only, under unrecorded leases.
6. Terms and conditions of those unrecorded lease agreements with Kwik-Wash Laundries, Inc., as Lessee, as evidenced by the Short Form Leases recorded in

WARRANTY DEED WITH VENDOR'S LIEN

Page 1

REAL ESTATE RECORDS
TRAVIS COUNTY TEXAS

12349 1819

Volume 5051, Page 1663 and Volume 7092, Page 2209, Deed Records and in Volume 11166, Page 308, Real Property Records of Travis County, Texas.

7. Taxes for the year 1995 and subsequent years.

Grantor, for the consideration and subject to the reservations from and 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 wise belonging, to have and hold it to Grantee, Grantee's heirs, executors, administrators, successors, or assigns forever. Grantor hereby binds Grantor and Grantor's heirs, executors, administrators, successors and assigns to warrant and forever defend all and singular the property to Grantee and Grantee's heirs, executors, administrators, successors and assigns, against every person whomsoever lawfully claiming or to claim the same or any part thereof, except as to the reservations from and exceptions to conveyance and warranty.

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 shall become absolute.

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

NationsBank of Texas, N. A. has advanced and paid to Grantor in cash that portion of the purchase price of the property that is evidenced by the first lien note. In consideration of that payment, Grantor retains a first and superior vendor's lien against and superior title to the property and transfers them to NationsBank of Texas, N. A. City of Austin, a Texas home-rule city and municipal corporation has advanced and paid to Grantor in cash that portion of the purchase price of the property that is evidenced by the second lien note. In consideration of that payment, Grantor retains a second and inferior vendor's lien against and superior title to the property and transfers them to City of Austin, a Texas home-rule city and municipal corporation.

BY ACCEPTANCE OF THIS DEED, GRANTEE ACKNOWLEDGES THAT GRANTOR HAS NOT MADE AND DOES NOT MAKE ANY REPRESENTATIONS AS TO THE PHYSICAL CONDITION OF THE PROPERTY, OR ANY OTHER MATTER AFFECTING OR RELATED TO THE PROPERTY (OTHER THAN WARRANTIES OF TITLE AS PROVIDED HEREIN AND THE REPRESENTATIONS AND WARRANTIES SET OUT IN SECTION 4.01 OF THE CONTRACT OF SALE ("CONTRACT REPRESENTATIONS") BETWEEN GRANTOR AND GRANTEE FOR THE SALE OF THE PROPERTY WHICH CONTRACT REPRESENTATIONS SHALL EXPIRE ONE (1) YEAR AFTER THE DATE HEREOF). GRANTEE EXPRESSLY AGREES THAT TO THE MAXIMUM EXTENT PERMITTED BY LAW, THE PROPERTY IS CONVEYED "AS IS" AND "WITH ALL FAULTS", AND GRANTOR EXPRESSLY DISCLAIMS, AND GRANTEE ACKNOWLEDGES AND ACCEPTS THAT GRANTOR HAS DISCLAIMED, ANY AND ALL REPRESENTATIONS, WARRANTIES OR GUARANTIES OF ANY KIND, ORAL OR WRITTEN, EXPRESS OR IMPLIED (EXCEPT AS TO TITLE AS HEREIN PROVIDED AND THE REPRESENTATIONS AND WARRANTIES SET OUT IN SECTION 4.01 OF THE CONTRACT OF SALE ("CONTRACT REPRESENTATIONS") BETWEEN GRANTOR AND GRANTEE FOR THE SALE OF THE PROPERTY WHICH CONTRACT REPRESENTATIONS SHALL EXPIRE ONE (1) YEAR AFTER THE DATE HEREOF) CONCERNING THE PROPERTY, INCLUDING, WITHOUT LIMITATION, (i) THE VALUE, CONDITION, MERCHANTABILITY, HABITABILITY, MARKETABILITY, PROFITABILITY, SUITABILITY OR FITNESS FOR A PARTICULAR USE OR PURPOSE, OF THE PROPERTY, (ii) THE MANNER OR QUALITY OF THE CONSTRUCTION, OR THE MATERIALS, IF ANY, INCORPORATED INTO THE CONSTRUCTION, OF ANY IMPROVEMENTS TO THE PROPERTY AND (iii) THE MANNER OF REPAIR, QUALITY OF REPAIR, STATE OF REPAIR OR LACK OF REPAIR OF ANY SUCH IMPROVEMENTS. BY GRANTEE'S ACCEPTANCE OF THIS DEED, GRANTEE REPRESENTS THAT GRANTEE HAS MADE (i) ALL INSPECTIONS OF THE PROPERTY TO DETERMINE ITS VALUE AND CONDITION DEEMED NECESSARY OR APPROPRIATE BY GRANTEE, INCLUDING, WITHOUT LIMITATION, INSPECTIONS FOR THE PRESENCE OF ASBESTOS, PESTICIDE RESIDUES, HAZARDOUS WASTE,

OTHER HAZARDOUS MATERIALS AND UNDERGROUND STORAGE TANKS AND (ii) INVESTIGATIONS TO DETERMINE WHETHER ANY PORTION OF THE PROPERTY LIES WITHIN ANY FLOOD HAZARD AREA AS DETERMINED BY THE FEDERAL EMERGENCY MANAGEMENT AGENCY, THE U.S. ARMY CORPS OF ENGINEERS OR OTHER APPLICABLE AUTHORITY.

Whitney Partnership, a Texas general partnership

By: Kay D. Whitney
Kay D. Whitney, Managing Partner

AGREED TO AND ACCEPTED BY:

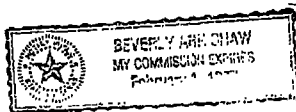
Project Transitions, Inc.,
a not for profit Texas corporation

By: Charlotte Hale
Charlotte Hale, Executive Director

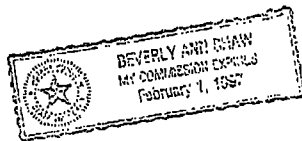
Acknowledgment

STATE OF TEXAS
COUNTY OF TRAVIS

This instrument was acknowledged before me on the 29th day of December, 1994, by Kay D. Whitney, Managing Partner of Whitney Partnership, a Texas general partnership, on behalf of said general partnership.



Beverly Ann Chaw
Notary Public, State of Texas



WARRANTY DEED WITH VENDOR'S LIEN

Page 3

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

12349 1821

Corporate Acknowledgment

STATE OF TEXAS
COUNTY OF TRAVIS

This instrument was acknowledged before me on the 30th day of December, 1994, by Charlotte Hale, Executive Director of Project Transitions, Inc., a not for profit Texas corporation, on behalf of said corporation.



Beverly Ann Shaw
Notary Public, State of Texas

AFTER RECORDING RETURN TO:

Ridge Williams
3305 Northland Drive, Suite 207
Austin, Texas 78731

After recording, return to:
Title Agency of Austin
3305 Northland Drive
Suite 100
Austin, Texas 78731
GF # 9411544D-9

dwhitney.t

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

JAN 9 1995



Ann Robinson
COUNTY CLERK
TRAVIS COUNTY, TEXAS

FILED

95 JAN -9 PM 2:01

DANA DEBENT FOR
COUNTY CLERK
TRAVIS COUNTY, TEXAS

WARRANTY DEED WITH VENDOR'S LIEN

Page 4

REAL PROPERTY RECORDS
TRAVIS COUNTY, TEXAS

12349 1322

RIDGE WILLIAMS
Attorney At Law

3305 Northland Drive, Suite 207, Austin, Texas 78731

SELLER'S STATEMENT

DATE: January 1, 1995

ORDER NO.: 94115440

SALE FROM: Whitney Partnership, a Texas general partnership

SALE TO: Project Transitions, a not for profit Texas corporation

PROPERTY: Broadacres Apartments

SALES PRICE	\$ 480,000.00
Disbursements/Credits	
Prorations:	
Hazard Insurance	\$
Flood Insurance	\$
Maintenance Charge	\$
Tax Proration from _____ to _____	\$
Escrowed accounts with Lender purchased by Purchaser	\$ 1,400.00
Lost rent per Contract	\$

TOTAL REIMBURSEMENTS/CREDITS	\$ 1,400.00
GROSS AMOUNT DUE TO SELLER	\$ 481,400.00

LESS: CHARGES AND DEDUCTIONS:

Down Payment or earnest money	\$
Commission to Davis & Associates (2%)	\$ 12,000.00
Commission to L. S. Realty (2%)	\$ 12,000.00
Filing Fees to County Clerk	\$
Loan Charges and Fees Due to _____	\$
Fees to Title Agency of Austin, Inc. Title Company	\$
Title Policy: Owner 3,482.00 Mortgagee	\$ 3,498.20
STPCF _____ GARC _____ Tax Info. 16.20	\$
Other _____	\$
Survey Fee to Austin Surveyors	\$ POC
Attorney's Fees/preparation of papers to: Ridge Williams	\$ 185.00
Attorney's Fees/preparation of papers to: _____	\$
Maintenance Charges	\$
All State and County taxes for 1994	\$
City and School taxes for _____	\$ POC
Capital Intermediary Company	\$
Note, Assumed or Paid	\$ 750.00
Interest from _____ to _____	\$
Tax proration from _____ to _____	\$
Rent proration from _____ to _____	\$
Pest Inspection Fee to _____	\$
Closing/Settlement Fee	\$
Escrow Fee	\$
Note retained by Seller	\$ 100.00
Federal Express	\$
Security Deposits	\$
Fax/Courier	\$ 3,700.00
*Capital Intermediary Company	\$ 25.00

TOTAL CHARGES AND DEDUCTIONS	\$ 32,258.20
NET AMOUNT DUE BY/TO SELLER	\$ 449,141.80

Seller understands the Closing or Escrow Agent has assembled this information representing the transaction from the best information available from other sources and cannot guarantee the accuracy thereof. Any real estate agent or lender involved may be furnished a copy of this Statement.

Seller understands that tax and insurance prorations and reserves were based on figures for the preceding year or supplied by others, or estimates for current year, and in the event of any change for current year, all necessary adjustments must be made between Purchaser and Seller direct.

The undersigned hereby authorizes RIDGE WILLIAMS, Attorney at Law to make expenditures and disbursements as shown above and approves same for payment. The undersigned also acknowledges receipt of Loan funds, if applicable, in the amount shown above and receipt of a copy of this statement.

Whitney Partnership, a Texas general partnership

By: Kay Whitney
Kay D. Whitney, Managing Partner
2105 Justin Lane, Suite 101, Austin, Texas 78757
(address)

RIDGE WILLIAMS

*NOTE: Interest of existing liens is figured to date indicated. If not paid by then, additional interest will have to be collected and your statement will be adjusted to have sufficient funds to secure release from the lienholder.

**Includes title search, title examination, title binder, closing services; 40% of premium is paid to Ridge Williams, Attorney at Law for legal services rendered title company.

RIDGE WILLIAMS
Attorney At Law

3305 Northland Drive, Suite 207, Austin, Texas 78731

PURCHASER'S STATEMENT

DATE: January 1, 1995 ORDER NO.: 94115440
 SALE FROM: Whitney Partnership, a Texas general partnership
 SALE TO: Project Transitions, Inc., a not for profit Texas corporation
 PROPERTY: Broadacres Apartments

PURCHASE PRICE. \$ 480,000.00
 PLUS: CHARGES

Filing Fees to County Clerk	\$	50.00
Loan Charges and Fees Due to NationsBank - Origination fee (\$1,900.00) & verification fee (\$8.00)	\$	1,908.00
Loan Transfer Fee or Assumption Fee	\$	
Fees to Title Agency of Austin, Inc Title Company	\$	350.00
Title Policy: Owner Mortgagee 200.00		
STPGF GARC Tax Info.		
Other Endorsements \$150.00 (EPA & Tax)		
Survey Fee to	\$	
Attorney's Fees/preparation of papers to: Ridge Williams	\$	125.00
Attorney's Fees/preparation of papers to: Harry Akin	\$	555.00
Hazard Insurance Premium to Central Insurance Agency	\$	3,358.40
Tax and Insurance Escrowed with	\$	
mos. tax deposit at _____ per month		
mos. hazard insurance at _____ per month		
mos. mortgage insurance at _____ per month		
Interest from _____ to _____	\$	
Proration of Hazard insurance from _____ to _____	\$	
Maintenance Charge Proration from _____ to _____	\$	
Tax Proration from _____ to _____	\$	
Lost rent per Contract	\$	1,400.00
Closing/Settlement Fee	\$	
Escrowed Accounts with Lender Purchased from Seller	\$	
Escrow Fee	\$	
Federal Express	\$	100.00
Fax/Courier	\$	25.00

TOTAL CHARGES \$ 7,871.40
 GROSS AMOUNT DUE BY PURCHASER \$ 487,871.40

LESS: CREDITS

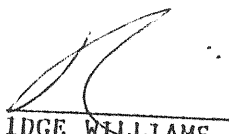
Down Payment or Earnest Money Paid to Ridge Williams	\$	10,000.00
Loan From NationsBank of Texas	\$	190,000.00
Note XXXXXX from City of Austin	\$	240,000.00
Interest proration from _____ to _____	\$	
Tax Proration from _____ to _____	\$	
Rent Proration from _____ to _____	\$	
Other Credit	\$	
Security Deposits	\$	3,700.00
	TOTAL CREDITS	\$ <u>443,700.00</u>
	BALANCE DUE BY/TO PURCHASER	\$ <u>44,171.40</u>

Purchaser understands the Closing or Escrow Agent has assembled this information representing the transaction from the best information available from other sources and cannot guarantee the accuracy thereof. Any real estate agent or lender involved may be furnished a copy of this statement.

Purchaser understands that tax and insurance prorations and reserves were based on figures for the preceding year or supplied by others or estimates for current year, and in the event of any change for current year, all necessary adjustments must be made between Purchaser and Seller direct.

The undersigned hereby authorizes RIDGE WILLIAMS, Attorney at Law, to make expenditures and disbursements as shown above and approves same for payment. The undersigned also acknowledges receipt of Loan Funds, if applicable, in the amount shown above and a receipt of a copy of this Statement.

Project Transitions, Inc., a not for profit Texas corporation


 RIDGE WILLIAMS

By: Charlotte Hale
~~XXXXXX~~ Charlotte Hale, Executive Director
 P. O. Box 4826, Austin, Texas 78765

*Includes title search, title examination, title binder, closing services; 40% of premium paid to Ridge Williams, Attorney at Law for legal services rendered title company.



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5e. Phase I ESA



**ROOSEVELT GARDENS
AUSTIN, TEXAS**

ATTACHMENT TABS

Attachment 5 – Property Info

5f. SHPO



State Historical Preservation Officer Consultation

The original structure of Roosevelt Gardens was built in 1969. After consultation with SHPO, it was determined the building was not of architectural significance and was cleared for demolition.