



LEGACY

IMPACT HOUSING

TOGETHER CHANGING LIVES

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places where all people can thrive.

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**Transforming land into
communities, leading people
to opportunity.**



Legacy IMPACT Housing is dedicated to delivering exceptional living opportunities and solutions for families and individuals regardless of income. The company utilizes the entire breadth of an internal family of companies to fulfill its mission to acquire, develop, design, build and deliver the best-in-class residential experience for persons of moderate income. Legacy IMPACT Housing has a disciplined experienced team of experts vetting opportunities and the infrastructure to execute creative, impactful housing developments varying in complexity and scope.

Our mission is to create quality homes for residents of modest means while enabling them to reach their fullest potential in their life.

As stewards of the land and of public trust, we pursue our mission in the spirit of service, teamwork, and respect. We embrace collaboration, innovation, and perseverance to find the best locations, living and lifestyle environment.



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"ALTITUDE EAST"

Legacy IMPACT Housing Developer RFP Response

3811 Tannehill Lane

7.96 Acre East Austin Development Opportunity
Austin Housing Finance Corporation

1.0 EXECUTIVE SUMMARY

1.1 Proposal Objectives – "Altitude East" Development and Community Priorities

The Austin Housing Finance Corporation (AHFC) Request for Proposals for a Developer to produce affordable housing on the property located at 3811 Tannehill Lane, Austin 78721 was strongly guided by input received from the East MLK Combined Neighborhood during the virtual outreach community meetings conducted by the AHFC. The Legacy Impact Housing conceptual development program was similarly based on the priorities expressed by the neighborhood community meeting participants in addition to the direction provided in the RFP by the AHFC. The Legacy Impact Housing development plan objectives for a development it has named "**Altitude East**" in priority order are:

- a. Maximize the number of **affordable dwellings** delivered – **294 (100% of residences)**.
- b. Maximize the number of rental dwellings affordable to persons with income at or below 50% Area Median Income (AMI) – **106 apartments (42% of total)**.
- c. Maximize the number of dwellings having more than one bedroom – **200 apartments (80% of total) and 40 owner occupied homes (91%)**.
- d. Maximize the number of rental dwellings affordable to persons with income at or below 30% AMI – **43 apartments (17%)**.

- e. Maximize number of owner-occupied homes available to persons with income at or below 80% AMI – **44 homes (100%)**.
- f. Maximize retention of existing trees on the site – **100% of heritage trees are retained**.
- g. Maximize the AHFC financial benefits derived from the proposed development - **\$5,297,698 revenue to AHFC**, including land lease payment.
- h. Achieve a financially feasible development while minimizing AHFC gap financing - **\$0 AHFC gap financing is needed**.
- i. Create a home-buyer **down payment assistance fund – \$220,000** for persons demonstrating financial need.
- j. Establish a community controlled **special projects fund – \$50,000** will be donated to the Hog Pen Neighborhood Association for community improvement projects of their choice.

1.2 Development Team Qualifications Statement

The Legacy Impact Housing development team has been strategically assembled to meet the rigors of the proposed Altitude East affordable housing plan for 3811 Tannehill Lane. Each member of the team is an expert in their field with proven experience in producing similar housing communities.

The Altitude East development proposal utilizes a complex financing structure which this team has used for other housing projects. A key component of the financing complexity is using the 4% Low Income Housing Tax Credit program administered by the Texas Department of Housing and Community Affairs combined with Texas Private Activity Bonds reserved through the Texas Bond Review Board. More than one-half of tax credit developments structured by Legacy Impact Housing staff have used the 4% tax credit program.

The Legacy Multifamily Construction Services (MCS) team member is a recognized and award-winning general contractor building some of the most impressive in-fill projects in the Austin area, including attached and detached high-density single-family homes, condominiums, townhouses, and apartments. Legacy MCS principals have extensive affordable and market rate apartment construction knowledge.

Subconsultants for Legacy Impact Housing bring Austin based best-in-class capacity in urban architecture, civil engineering, urban planning, tax credit application, legal representation, property management, and resident services.

2.0 DEVELOPMENT CONCEPT

2.1 Development Concept

2.1.1 Building Types

The apartment component of the Altitude East planned community will consist of an asymmetrical four-story residential building wrapping three sides of a four-story parking garage. The apartment footprint creates usable landscaped interior courtyard spaces for the residents. Clusters of the for-sale homes are selectively distributed on the site to create a central communal landscape area and preserve significant trees on the site. Home building heights are two and three-story (24'-36'). A community center within the apartment building will offer residents easy access to the on-site property management staff, resident services programs, fitness and business centers, and communal space in the central community entertainment room. Space has been allocated in or adjacent the apartment building for a small local market.

2.1.2 Development Intensity – Gross Floor Area

Apartments: 277,960 sf (approximately)

Homes: 51,000 sf (approximately)

2.1.3 Building Heights

Apartment Building: Four-story or 48'

Parking Garage: Four-story or 48' (approximately)

Homes: Five buildings at two-story or 24' and four buildings at three-story or 36'.

2.1.4 Impervious Cover

Total project impervious cover = 218,864 sf or 63% of site area.

2.1.5 Parking Spaces

Apartment parking: 290 spaces

Home parking: 44 spaces

Street parking: 16 spaces along Jackie Robinson

2.1.6 Open Space

127,663 sf or 37% of the site.

2.1.7 Residences Offered

2.1.7.1 Income Restricted Apartments - 250

<i>AMI</i>	<i>1 Bedroom</i>	<i>2 Bedroom</i>	<i>3 Bedroom</i>
30%	12	21	10
50%	10	21	32
60%	18	49	28
70%	10	24	15

(All 1BR = 651 sf, 2BR = 900 sf, 3 BR = 1,100 sf)
Market rate apartments: None

The income and rent restrictions imposed by the Low Income Housing Tax Credit rules will remain in effect for a minimum of 40 years. This minimum affordability period will be memorialized in funding agreements, the land lease, and a restrictive covenant running with the land. Including AHFC in the development owner structure and offering AHFC a right of first refusal also will enable AHFC to extend the affordability period indefinitely.

2.1.7.2 Income Restricted For-Sale Homes - 44

<i>AMI</i>	<i>1 Bedroom</i>	<i>2 Bedroom</i>	<i>3 Bedroom</i>
80%	4	23	17

(1BR = 900 sf, 2BR = 1,100 sf, 3BR = 1,300 sf)
Market rate homes: None

Each home will be subject to a restrictive covenant defining the amount of market value increase the homeowner may claim from the sale of their home. Due to the underlying land being owned and controlled by the Community Land Trust (or AHFC) for the purpose of reducing the homeowners' property taxes, annual property value appreciation will be capped at an amount less than the free market may be experiencing. However, the permitted appreciation amount increases annually allowing the homeowner to receive larger amounts of market appreciation over time. Ultimately, the home owner will be eligible to receive 100% of the market appreciation upon a home resale. HomeBase will administer the appreciation restrictions imposed by the Community Land Trust

program as each home is presented for sale. All the homes will remain affordable to persons earning at or below the 80% area median income level for a period of 99 years. This affordability restriction will be recorded in a restrictive covenant that runs with the land and will be reflected in the title policy of each homeowner.

2.2 Market Demand

As the Austin Strategic Housing Blueprint reports, the unmet need for affordable housing (at or below 80% AMI, 47% of Austin's population) increases annually, yet the tools available to produce affordable housing limit production to levels that, arguably, suggest the need will remain unmet barring significant institutional empowerment changes. "While 35% of the city households earn 60% MFI or below, only 15% of the city's housing stock is affordable to them..." (Austin Strategic Housing Blueprint). The Housing Blueprint projected 60,000 affordable housing units are required to keep up with the projected population increase driven demand by 2025. This estimated need may be understated given the accelerated rate of gentrification in Austin's east-side neighborhoods since the Blueprint was produced and the economic devastation caused by the COVID-19 pandemic. The subject Tannehill Lane development proposal will address these Blueprint Goals:

- Contribute to the needed 20,000 housing units affordable to households with income of 30% AMI and below.
- Contribute to the needed 25,000 housing units affordable to households with income of 31% to 60% AMI.
- Contribute to the needed 15,000 housing units affordable to households with income of 61% to 80% AMI, particularly homes available for purchase.
- Contribute to the 75% of new housing units desired to be located within ½ mile of Imagine Austin Centers and Corridors.
- Contribute to the 25% of new rent-restricted housing being located within high opportunity areas.
- Create affordable rental housing offering two or more bedrooms for at least 25% of the housing development total units.
- Create affordable housing located within ¼ mile of high-frequency public transit.
- Creating affordable housing within ¾ mile of local, fixed-route transit service.

To quantify the estimated market demand for the Altitude East apartment housing in 2023 (the assumed tax credit award year, financing closing, and construction commencement), a review of the apartment home demand generated by households with income at or below 60% AMI was performed by Apartment MarketData. Included within the market demand analysis are the maximum market capture rates imposed by the Texas Department of Housing and Community

Affairs. In other words, the demand estimates are the numbers of housing units needed in the market that will not produce an oversupply of apartments that would negatively impact the subject and other affordable housing apartment properties.

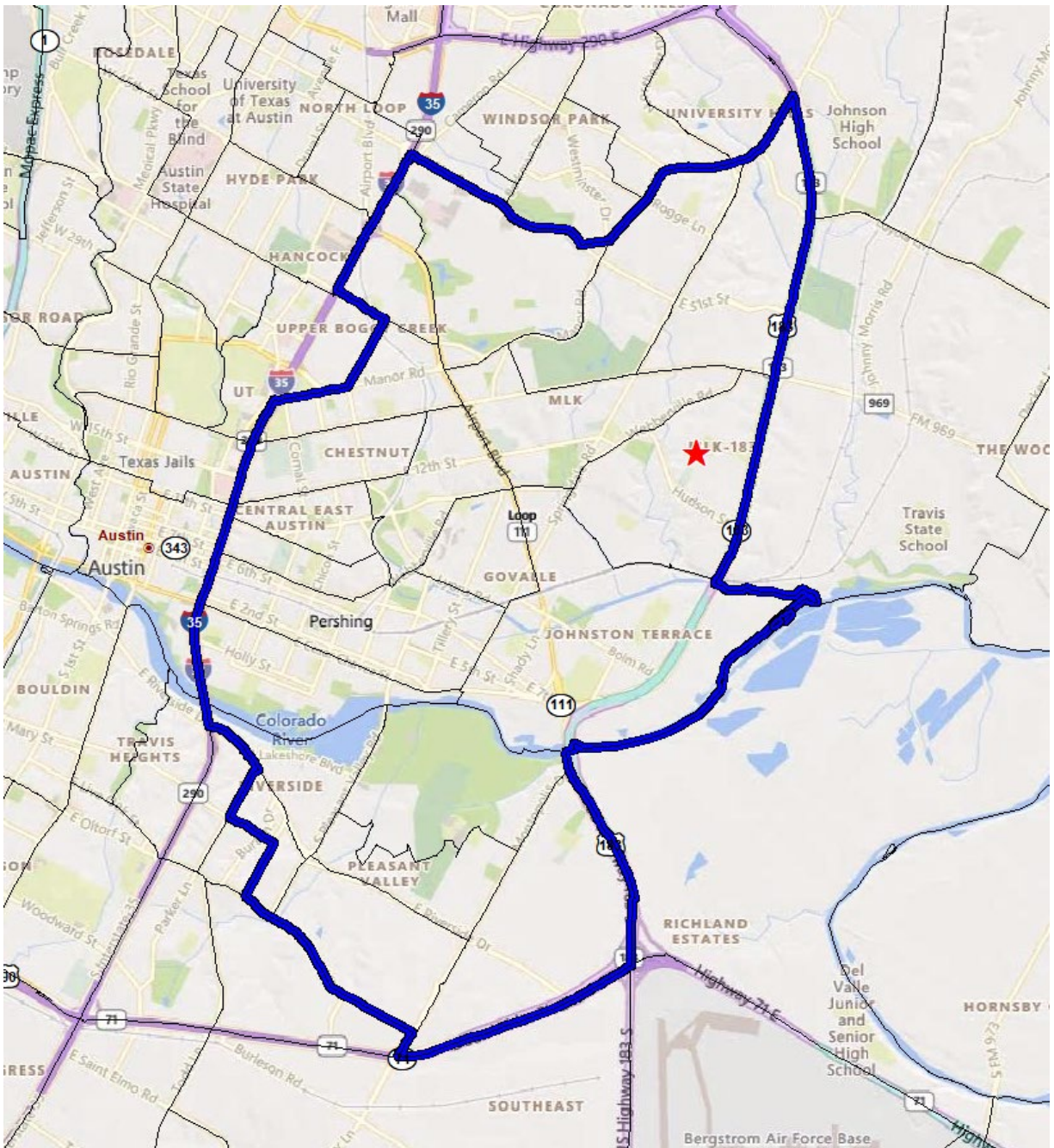
Their results show an apartment housing demand within the specific defined Primary Market Area for the subject property area to be 438 apartments for families at or below 30% AMI, 396 apartments for families at or below 50% AMI, and 698 apartments for families at or below 60% AMI.

The proposed rent to be assessed for the 49 apartment homes available to families having income at or below 70% AMI are at least 10% below comparable market rate apartment properties. Affordable housing equity investors and lenders consider a 10% rental rate difference to be sufficiently large to attract qualified renters to the affordable property rather than a market rate property where they would spend more than 30% of their income on rent. Offering 70% AMI apartment homes is a relatively new concept allowed by recent changes to the Internal Revenue Code. Existing affordable apartment properties generally are allowed to charge a maximum of 60% AMI rents. There is essentially no competition in the market for 70% AMI apartments for the unrestricted market rate apartments are charging rents at amounts affordable to persons having income in the 80% to 100% AMI and above levels. The 70% AMI rent level is offered to accommodate teachers working at the adjacent Norman Sims Elementary or other nearby schools as was the requirement of the Austin ISD when it sold the land to the AHFC.

The market demand by income band and apartment bedroom number coupled to the three income bands is presented on the following page.

FAMILY								
Unit Size	2021 Demand	2022 & 2023 Growth Demand	10% External Demand	Total Demand	Subject Units	Comparable Units	Inclusive Capture Rate	Additional Units Allowed
Overall	10,304	-22	1,028	11,310	0	164	1.5%	1,533
30% Band	2,766	-71	269	2,964	0	7	0.2%	438
50% Band	2,939	-3	294	3,230	0	88	2.7%	396
60% Band	4,599	52	465	5,116	0	69	1.3%	698
1 BR/30%	511	-7	50	554	0	4	0.7%	356
1 BR/50%	484	2	49	535	0	40	7.5%	307
1 BR/60%	793	8	80	881	0	19	2.2%	554
2 BR/30%	675	-22	65	718	0	2	0.3%	465
2 BR/50%	500	-3	50	547	0	37	6.8%	318
2 BR/60%	1,064	-23	104	1,145	0	34	3.0%	710
3 BR/30%	507	-11	50	546	0	1	0.2%	354
3 BR/50%	209	2	21	233	0	11	4.7%	140
3 BR/60%	573	12	59	644	0	16	2.5%	402

MARKET DEMAND ANALYSIS



PRIMARY MARKET AREA

2.3 Conceptual Plan

Mark Odom Studio, architect, carefully considered the Tannehill Lane RFP stated objectives, stated neighborhood goals, and the Legacy Impact Housing development vision in producing the conceptual site plan. The following document presents a visual exhibit of the site use configuration, guiding concepts in the design, examples of how site plan elements could look or function, and a summary of key site development statistics.

The plan is the result of meeting multiple objectives; maximizing the number of housing units while keeping the scale of the buildings within the context of the surrounding neighborhood structures, delivering both rental and for-sale homes, tree preservation, and restoring and returning a significant natural feature that has been lost to the community. A powerful statement made in the community meetings leading to the RFP release was “the community is losing its identity”. Development of the Tannehill Lane site presents the opportunity to be responsive to this neighborhood concern. Reflecting upon the prior use of the site for recreational purpose and thickly vegetated open space drove the design process to maintain the feeling and appearance of densely vegetated areas while, more importantly, welcoming the neighborhood into and through the developed site. From this understanding, the concept of “communal landscape” (or as the architect describes as Common Grounds) was actually the initial building block for laying out the site plan. Defining the communal area and pedestrian flow through the land established the boundaries for placement of the homes, apartment building, and parking. Vehicular access into the site has been located so not to interfere with the pedestrian use.

Another development request consideration expressed by the Hog Pen Neighborhood Association, the neighborhood within which the property is located, is allocating some site area to a future local market, such as a small “Mom and Pop” enterprise or a farmers’ market. Although large food stores are conveniently located for the neighborhood residents, a “lost” characteristic of the neighborhood is the loss of small, neighborhood friendly convenience shopping opportunities. An area adjacent to or within the ground floor of the apartment building nearest Jackie Robinson Street has been reserved for a specialized small market use. Parking for this market is available both on site and the new Jackie Robinson Street parallel parking.

In order to identify any limiting site conditions, regulatory requirements, or existing infrastructure improvements Bowman Engineering prepared the civil engineering due diligence report that is included following the Odom Studio site plan presentation. The due diligence conclusions are the current water, sewer, and storm sewer improvements within Tannehill Lane and Jackie Robinson Street are adequately sized to service the proposed housing development plan. Although the "MF-2" zoning site regulations are referenced in the due diligence report because that will be the zoning change requested, the site plan represents residential development that is compliant with the allowed "MF-6" zoning site development regulations without the need for variances using the S.M.A.R.T. Housing Greenfield Multifamily Bonus Density standards allowed.

The Altitude East site will be subdivided into a two-lot subdivision; an apartment development lot and the for-sale home lot. The for-sale home lot will be organized under a condominium regime. Should the local market concept survive the Developer Agreement negotiation and found to be a sustainable land use, the property rezoning request will include a small "LR", local retail, footprint in addition to the "MF-2" for the residential area.

Altitude East

RFP/ 3811

Tannehill Lane

Legacy Impact Housing +
m(ødm) studio

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05	Context Map
06	Proposed Site Plan
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(i)	Written Response to Neighborhood Goals

Situated within the East MLK Neighborhood, adjacent to Austin's growing public transportation infrastructure and surrounded by existing communities with cultures whose roles in East Austin are foundational to maintaining an important heritage and nostalgic character through the areas projected growth, 3811 Tannehill Lane exposes the need to create a unifying place for existing residents to further cultivate a cultural and social identity.

We are proposing to generate *Altitude East* to function as the place to cultivate the neighborhoods identity and to provide a diverse and equitable range of 100% affordable housing opportunities.

The ability for this proposal to respond to these cultural and housing needs are made possible through consistently addressing the following key concepts:

- The existing site's landscape and trees are respected, preserved, and stitched to the existing neighborhood by extending pedestrian and bicycle paths through the site and allowing access to new parks, public spaces, and a local market to cultivate communal interactions while providing safe access to natural amenities and public transportation.
- Housing density is equally distributed through the site to respond to the surrounding building scales and to provide a diverse range of home ownership and rental opportunities, fostering the existing diverse and nostalgic culture of the neighborhood and performing as a place to generate more diversity.
- Integrating sustainable systems, like biofiltration detention ponds and rain gardens, orients the housing on the site along the connective natural space and provides equal visual and physical access to the communal landscape, promoting sustainable lifestyles for residents and the surrounding neighborhood.

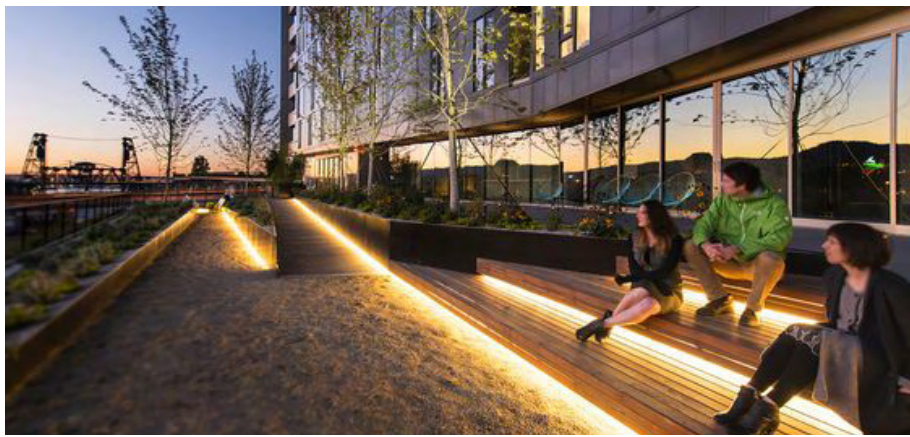
proposal

key concepts

Proposed Zoning:
MF-2

Proposed Affordability Incentives:
S.M.A.R.T. Housing // Greenfield Multifamily
Density Bonus
+
Affordability Unlocked

Sustainable Building Strategies:
100% Affordable Housing
+
Austin Green Building 1 star rating

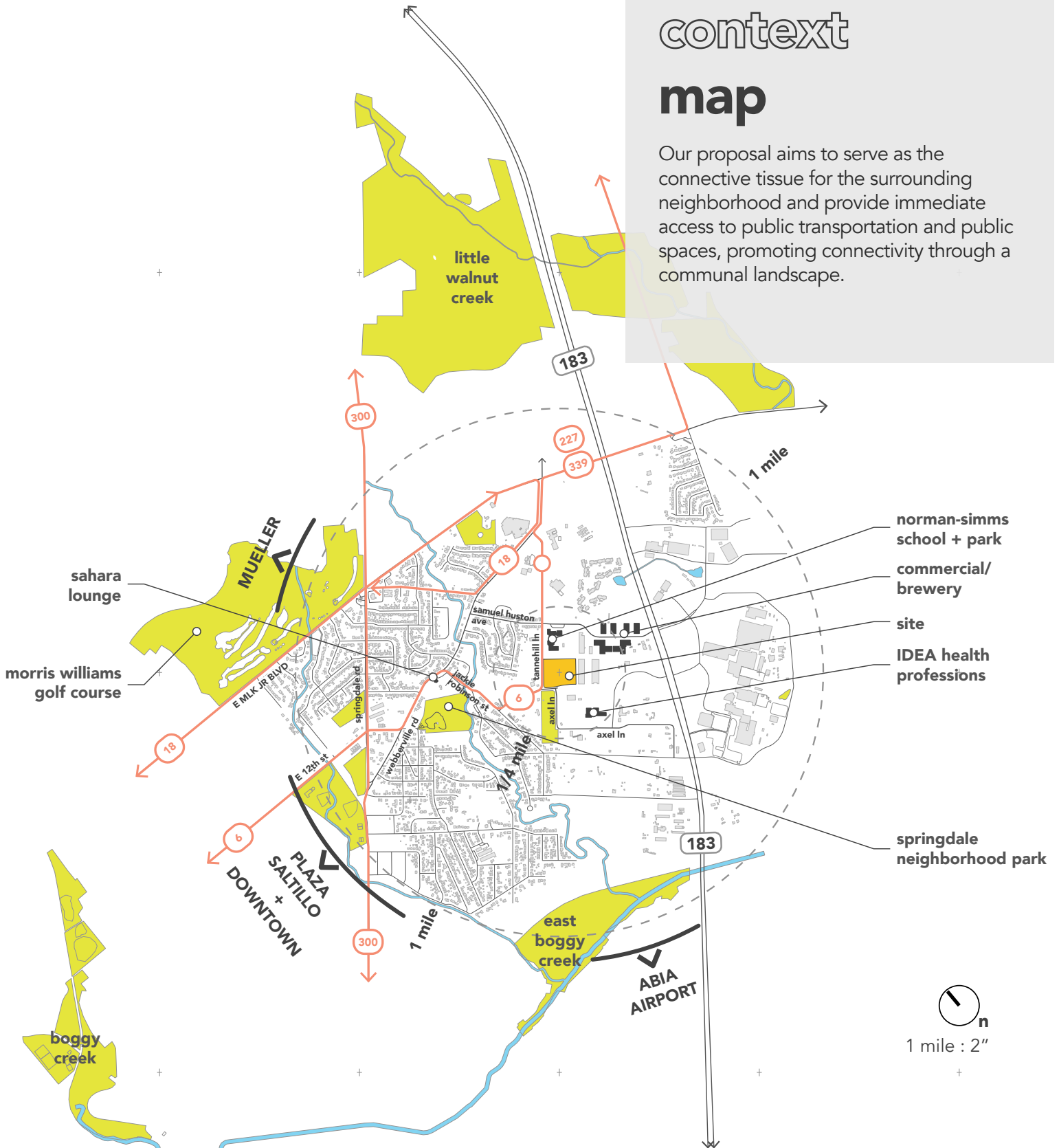


inspiration imagery

Emphasizing the connective landscape and paths through the site, the existing landscape and the organization of homes aims to generate moments of communal interaction - promoting a sustainable lifestyle.

context map

Our proposal aims to serve as the connective tissue for the surrounding neighborhood and provide immediate access to public transportation and public spaces, promoting connectivity through a communal landscape.



key

- capMetro bus route
- major road
- local road

site plan



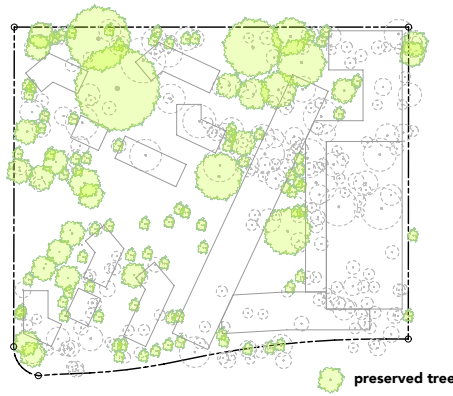
Equally dispersed housing opportunities, for rent and ownership, are organized on the site to generate a connective and communal landscape - stitching the existing neighborhood to trails and a local market. This organization promotes a sustainable community for the existing neighborhood and the residents of the new housing opportunities and maintains the existing landscape by retaining as many trees as possible and embedding rain gardens and naturally filtered water detention systems.



site articulation diagrams

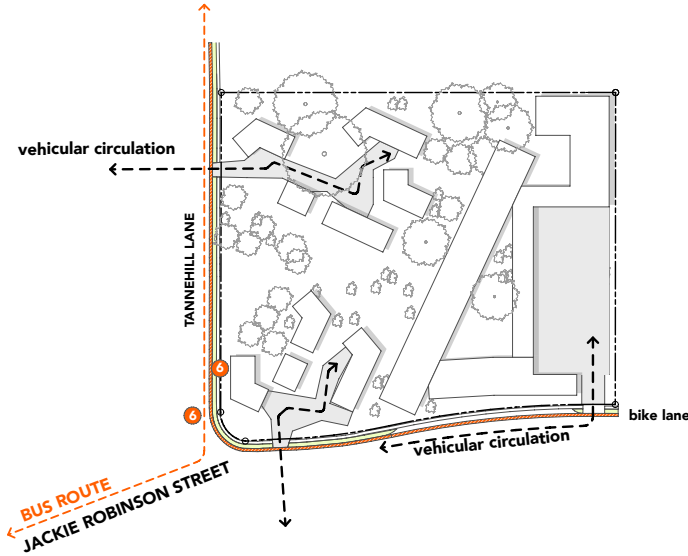
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Building footprints are oriented and organized to preserve as many heritage trees as possible and minimally impact the existing landscape.



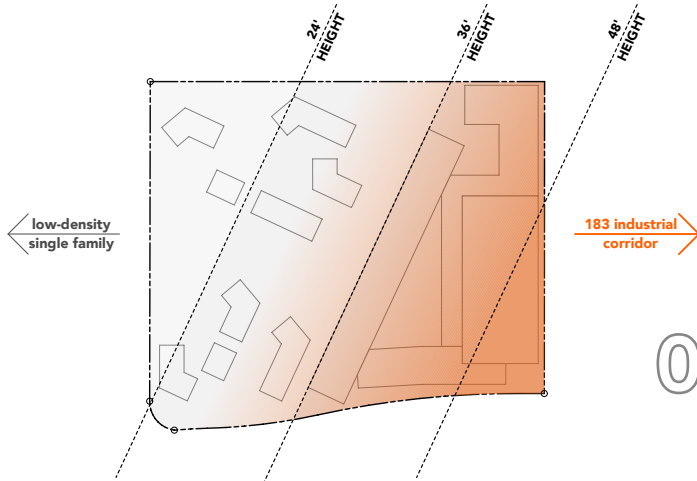
01

Vehicular circulation is distributed along Tannehill + Jackie Robinson to limit congested vehicular traffic on site and to provide safe pedestrian + bicycle friendly paths through the site with access to public transportation.



02

Responding to the surrounding neighborhood the proposal utilizes a gradient of heights, organizing the rental building towards the commercial/industrial zoned neighbors while dispersing home ownership opportunities where smaller density single family residential zoning exists.



03

A communal landscape stitches the existing neighborhood to the site's, providing pedestrian and bicycle friendly paths through the site for access to neighborhood parks and spaces.



RENTAL APARTMENTS	HOME TYPE	AVG. AREA PER UNIT		TOTAL AREA (SF)	% OF TOTAL UNITS
		QUANTITY	(SF)		
	1-bedroom	47	618 sf	29,064 sf	19%
	2-bedroom	133	886 sf	117,792 sf	53%
	3-bedroom	70	1,153 sf	80,722 sf	28%
	TOTAL	250		227,578 sf	
		TOTAL UNIT AVG SF		910 sf	
HOMES FOR SALE	HOME TYPE	AVG. AREA PER HOME		TOTAL AREA (SF)	
		QUANTITY	(SF)		
UNIT A		2			
	1-bedroom	0	900 sf	0 sf	
	2-bedroom	4	1,100 sf	4,400 sf	
	3-bedroom	3	1,300 sf	3,900 sf	
		14		16,600 sf	
UNIT B		4			
	1-bedroom	1	900 sf	900 sf	
	2-bedroom	2	1,100 sf	2,200 sf	
	3-bedroom	2	1,300 sf	2,600 sf	
		20		22,800 sf	
UNIT C		1			
	1-bedroom	0	900 sf	0 sf	
	2-bedroom	3	1,100 sf	3,300 sf	
	3-bedroom	1	1,300 sf	1,300 sf	
		4		4,600 sf	
UNIT D		2			
	1-bedroom	0	900 sf	0 sf	
	2-bedroom	2	1,100 sf	2,200 sf	
	3-bedroom	1	1,300 sf	1,300 sf	
		6		7,000 sf	
	TOTAL	44		51,000 sf	
		TOTAL UNIT AVG SF		1,159 sf	
		TOTAL FOR SALE BREAKDOWN		% 1- bed % 2- bed % 3- bed	9% 52% 39%
	TOTAL UNITS	294		278,578 sf	
		TOTAL UNIT AVG SF		948 sf	
		TOTAL UNIT BREAKDOWN		% 1- bed % 2- bed % 3- bed	17% 53% 30%

SITE	AREA NAME	BUILDING AREA (SF)		
	PARKING GARAGE	35,778 sf		
	SURFACE PARKING	22,040 sf		
	GROSS BUILDING AREA - For Rent	66,082 sf		
	GROSS BUILDING AREA - For Sale	34,286 sf		
	LOCAL MARKET - Commercial Use	2,900 sf		
	GROSS PROJECT AREA	161,086 sf		
	BUILDING IMPERVIOUS SF	161,086 sf		
	SURFACE PARKING IMPERVIOUS SF	57,778 sf		
	TOTAL IMPERVIOUS	218,864 sf		
	TOTAL SITE AREA	346,627 sf		
	IMPERVIOUS COVER %	63%		

PKG	PARKING TYPE	# PARKING SPACES		
	(4) LEVEL PARKING STRUCTURE	290		
	SURFACE PARKING - CLUSTER 01	20		
	SURFACE PARKING - CLUSTER 02	24		
	STREET PARKING	16		
	TOTAL PARKING PROVIDED	350		

site data + parking

Proposed Zoning:
MF-2

Proposed Affordability Incentives:
S.M.A.R.T. Housing // Greenfield Multifamily
Density Bonus
+
Affordability Unlocked

Sustainable Building Strategies:
100% Affordable Housing
+
Austin Green Building 1 star rating

housing mix data

East MLK Neighborhood Goals + Questions

Written responses addressing the proposal's intent to cultivate and expand on the existing neighborhood's goals and questions presented by the East MLK Neighborhood Contact Team Presentation Requirements.

East MLK Neighborhood Plan Contact Team Meeting Presentation

Neighborhood Questions

1. Which goals in the East MLK Combined Neighborhood Plan does this project satisfy?

- The Proposed project aims to cultivate a safe community embedded into the existing neighborhood that serves and provides a diverse range of housing and social opportunities. Our proposed site plan is organized to not only foster the existing social and economic diversity, but also seeks to cultivate it even further. To do this we sought to equally distribute housing types throughout the site and give all housing access to a communal landscape amenity.
- Surrounded by public academic institutions, trails, and residential neighborhoods, we are imagining our site as a key outreach to connect all of these differing community groups. We are also envisioning the site as a central outdoor amenity for the adjacent neighborhoods. This will encourage pedestrian and bicycle traffic not only through our site, but also throughout the adjacent existing neighborhoods to the new amenity.
- The communal landscape preserves and cultivates a large portion of the existing landscape and trees on the site. In addition, with the integration of rain gardens and public trails we are not only keeping the existing, but cultivating it further as an amenity for the community to utilize and appreciate.
- Please see the proposals response to each Neighborhood goal below, addressing each goal and how the proposal aims to prioritize the neighborhood's development plan:

NEIGHBORHOOD GOALS:

Goal One

- ***Preserve established residential areas and improve opportunities for home ownership by promoting the rehabilitation of existing housing and new, infill housing compatible with the existing style of this neighborhood.***
- **Response:** Development of the site will provide a meaningful land use transition from the Techni Center industrial park to the established and evolving residential neighborhood. The industrial park use intensity is stepped down through a multifamily building and further reduced through attached two and three-story residential structures. Proposed buildings nearest Tannehill Lane are for sale homes accessible to persons with income not exceeding 80% of the area median income, affordable housing.

Goal Two

- ***Promote a mix of land uses that respect and enhance the existing neighborhood and address compatibility between residential, commercial, and industrial uses.***
- **Response:** The proposed mixed use of the site with rental and for-sale dwellings provides a creative approach to buffering the existing neighborhood from the Techni Center industrial use while enhancing the neighborhood connectivity to the Norman Sims Elementary School. The innovative project land plan integrates single family and multifamily uses within the site through an organic internal layout rather than the traditional subdivision of lots. Vehicular access into the site is finely controlled rather than permitting excessive driveway cuts along the boundary streets.

Goal Three

- *Preserve existing small businesses and encourage new neighborhood-serving commercial services in appropriate locations.*
- **Response:** The highest and best use of this site is residential. Given the site is not located on a major arterial street, commercial land uses were not considered to be practical. However, the proposed future residential land use will provide small business opportunities for building and landscape maintenance as well as project construction. Another development request consideration expressed by the Hog Pen Neighborhood Association, the neighborhood within which the property is located, is allocating some site area to a future local market, such as a small “Mom and Pop” enterprise or a farmers’ market. Although large food stores are conveniently located for the neighborhood residents, a “lost” characteristic of the neighborhood is the loss of small, neighborhood friendly convenience shopping opportunities. An area adjacent to or within the ground floor of the apartment building nearest Jackie Robinson Street has been reserved for a specialized small market use. Parking for this market is available both on site and the new Jackie Robinson Street parallel parking.

Goal Four

- *Promote the development and enhancement of the neighborhood’s major corridors.*
- **Response:** Although Tannehill Lane is not considered a major corridor street it plays an important role in providing secondary access to commercial and residential areas as well as a back-up route for emergency responders. Enhancement of the Tannehill Lane street corridor will include addition of pedestrian sidewalks along the eastern side and working with Capital Metro to create shaded bus stop structures. Additional street right-of-way will be dedicated to extend Jackie Robinson eastward and sidewalks will be added along the northern side.

Goal Five

- *Provide housing that helps maintain the social and economic diversity of residents.*
- **Response:** This development will directly address the threat of gentrification within the neighborhood. One hundred percent of the living units created will be considered affordable housing and accessible to the current neighborhood residents as well as those that already left the neighborhood because of escalating property taxes. The rental apartments will offer apartment homes with rents affordable to persons earning from 30% of the area median income to 80% of the area median income, with more than 50% of the apartments priced for persons at or below 50% area median income and 72% of the apartments designed for family use with two and three bedrooms. Responding to the quickly escalating new home sale prices in the neighborhood, all homes for sale will not exceed the City of Austin Development Incentive Programs’ affordable prices ranging from \$211,400 for a one-bedroom home to \$285,000 for a three-bedroom home (or as adjusted by the City) making them affordable to persons with income not exceeding 80% area median; also making them eligible for City of Austin home buyer assistance programs such as down payment assistance.

Goal Six

- *Protect and enhance historic resources and structures and preserve the area’s historic and cultural character.*
- **Response:** Neighborhood residents have enjoyed the ropes course on the site and have appreciated the site for its natural environment character. The vegetated nature will be preserved through the strategic building placement away from significant trees, particularly the heritage trees. The existing tree cover is regarded as a site asset that must be respected by the development plan. The Legacy Impact Housing business philosophy of good land stewardship will extend beyond the boundaries of this residential site. A fund will be established for the E MLK Combined Neighborhood Planning Area’s use to repair or enhance the historic cemetery at the southwest corner of Jackie Robinson and Tannehill, the Norman-Sims recreational park, and the Greater Works Baptist Church walking trail area.

Goal Seven

- ***Create a transportation network that allows all residents to travel safely throughout the neighborhood by improving safety on major arterials and neighborhood streets.***
- **Response:** This development will improve Jackie Robinson by constructing an extension to the east in anticipation that it may be further extended in the future to Bluestein Drive. Neighborhood traffic safety will be promoted through limiting vehicular traffic into the new residential site to three controlled locations, two along Jackie Robinson and one along Tannehill Lane. Should the City of Austin require a traffic impact analysis, the results could include additional improvements to the site boundary streets.

Goal Eight

- ***Provide access to, from, and through the neighborhood for all residents by promoting a neighborhood-friendly system of transportation.***
- **Response:** A fundamental design consideration for the proposed site development is providing a physical connection between the new residences and the surrounding neighborhood. This is accomplished by inviting the neighborhood to travel into and through the site to promote safe travel to Norman Sims Elementary School as well as enjoyment of the preserved and improved natural setting within the site. Connecting the internal pedestrian travel paths to the surrounding properties will be new sidewalks installed along the east side of Tannehill Lane and north side of Jackie Robinson.

Goal Nine

- ***Improve bicycle and pedestrian traffic safety on neighborhood streets.***
- **Response:** The addition of sidewalks and bicycle lanes along Tannehill Lane and Jackie Robinson will improve both bicycle and pedestrian traffic safety and continue improving the neighborhood travel connectivity.

Goal Ten

- ***Address neighborhood security by reducing illegal and dangerous activities and improving the sense of public safety.***
- **Response:** Control over use of the development site will be greatly improved initially through the creation of residences with an interest in self-policing site use activities. Site lighting will ensure public safety by illuminating the interior pedestrian and parking spaces. The potential to conduct illegal activity under the cover of the current thick vegetative cover will be significantly reduced.

Goal Eleven

- ***Protect and enhance the neighborhood through code enforcement, property maintenance activities, and by reducing trash and dumping in the neighborhood.***
- **Response:** The potential for trash dumping on the site will be eliminated through development, the property will be maintained by a professional apartment management business and property owners' association, and the new residential structures will be designed and inspected in accordance to the City of Austin building code standards.

Goal Twelve

- ***Improve the quality, safety, and cleanliness of area creeks, and reduce the impact of flooding in the neighborhood.***
- **Response:** Development of property will be in compliance with the City of Austin watershed development detention and water quality regulations. Permitted rainfall runoff from the site will not be

greater than that occurring prior to development and will be controlled with rain gardens and detention/filtration basins.

Goal Thirteen

- ***Create more public open space, including parks and green spaces, improve existing parks and increase recreational amenities in the neighborhood.***
- **Response:** Meeting this goal has been a driving force in designing the development plan. Respecting that the natural environment has been revered and utilized by the neighborhood led to balancing the amount of site disturbance, vegetative preservation, and housing production. The area used for housing and parking is approximately 60% of the site, leaving the balance to craft a meaningful green space to share with the neighborhood. The limited but robust housing delivered along with the natural and improved accessible paths through the site are what set this development plan apart from other concepts.

2. Have you identified and established contact with the relevant Neighborhood Association? Which Neighborhood Association?

- The E. MLK combined Neighborhood Planning Group Contact Team has been contacted which in turn identified the Hog Pen Neighborhood Association as the area representative to receive information on the proposed affordable housing development. A development concept meeting with the Hog Pen Neighborhood Association was held on July 29th, 2021.
- It is our understanding that since an amendment to the plan's Future Land Use Map (FLUM) and rezoning will be required, we shall meet with the neighborhood plan contact team for a recommendation per city code.

3. Aside from the site plan, has any visualization for the project -- i.e., colored elevations, renderings, etc. -- been produced?

- A colored site plan has been produced to emphasize the communal landscape and the distribution of the sustainable lifestyle for the diverse housing and the connection to the surrounding neighborhood.

4. What is the expected number of vehicle trips per day for the project? Will a Traffic Impact Analysis or Neighborhood Traffic Analysis be required; if so, has one been executed?

- A traffic impact analysis will be required during the site plan stage if vehicular traffic exceeds 2,000 trips per day.

5. What construction type is intended, and what measures do you plan to take to ensure the resultant buildings are durable?

- The proposal assumes a 4-story wood framed construction type intended to provide the community a long-lasting and sustainable building with a minimum of a 1-star Austin Green Building rating.

6. What green building strategies and features are being planned for buildings and landscape?

- Austin Green Building (S.M.A.R.T. Housing Requirement)
- Our proposal distributes landscape amenities for the surrounding neighborhood and site residences and integrates and maintains the existing landscape and trees. Bike lanes and pedestrian friendly paths stitch the existing neighborhood, connecting to the buildings on the site and orienting the long direction of the buildings toward the North and South to provide ample lighting to provide equal access to parks and outdoor spaces to the community to promote a sustainable environment.
- Bike parking spaces and electric vehicle charging stations are planned to be integrated into the organization of the buildings and the landscape on the site, allowing for and promoting a sustainable lifestyle for the community not only within the proposed development but also for the surrounding existing neighborhood.

7. How are you taking advantage of existing trees and other landscape features?

- Existing heritage trees and landscape is proposed not only to be retained, but to become a feature for the development and surrounding neighborhoods. Organizing parking into a parking structure, and separating vehicular circulation on the site allows for the footprint of parking on site to be minimized to preserve the existing landscape and trees.

8. What steps are you taking to ensure flooding does not occur on adjacent properties? What about contamination and erosion of nearby creek banks?

- Site detention is proposed to be embedded into the common landscape amenity through a series of communal rain gardens as required. We have begun to work with Bowman Civil Engineers to study the need for and types of rain gardens to address the site water quality. We are locating the rain gardens throughout the site to take advantage of the natural grade as well as to create visual interest points within the communal landscape.

9. What measures are you taking to minimize light pollution and prevent light trespass at adjacent single-family residential properties?

- Minimizing the impact on the existing landscape and trees, and providing communal landscape and natural artery through the site and connecting to the surrounding landscape acts as a natural barrier to light pollution between the proposed housing and the existing single family neighborhood. In addition, the landscape will be lit to celebrate the landscape itself, with minimal full covered lights. The site strategy also moves the most intense portion of the project, the parking garage, furthest away from surrounding residences and schools. The parking will then be wrapped with units on 3 sides not facing the ally, to block light seepage from it.

10. How is the project compatible with the scale and character of the surrounding neighborhood?

- Situating higher density housing adjacent to surrounding higher density commercial and industrial zoning and dispersing lower density housing towards the surrounding lower density single family residential zones blends the proposed housing types into the existing neighborhood and respects the surrounding community.
- Our project proposes extending the existing fabric of the surrounding small scale residential and schools by organizing the site so that there is a stepped height transition that occurs over the entire width of the site. This is accomplished by organizing the smaller building masses and more specifically the 2 story structures across from the surround residences to match their scale. We then transition to 3 story structures and subsequently the 4 story building aligns itself across from and acts as a visually barrier for the adjacent warehouses.

11. What benefits, besides additional housing, will this project provide to the neighborhood and planning area?

- The purposed communal landscape within our proposed site plan aims to become an amenity for the neighborhood. With this site's historic use of a ropes course, we seek to revitalize this sites appreciation and use as an outdoor amenity for the entire community. Part of our proposed solution is to literally reach across adjacent roads as an outreach to the surrounding neighbors to enjoy the site, as well as, extending and continuing to activate the adjacent oaks and trails via pedestrian and bicycle traffic through our site.
- Our site strategy has been developed as a gesture to both include and extend the existing neighborhood fabric. With the stepped height, broken down massing similar to adjacent buildings and our reactivation of the site as an outdoor community amenity, we feel that we are both continuing and enhancing the character of the neighborhood.
- To further extend the public use of the communal landscape a local market is integrated into the footprint of the apartment homes at the ground level - serving as a public extension into the landscape and a programmatic opportunity for the neighborhood to activate and potentially operate.

THANK YOU

Bowman

Due Diligence Report

3811 Tannehill Lane

Bowman

1120 S. Capital of Texas Highway
Building 3, Suite 220
Austin, TX 78746
512.327.1180 | bowman.com

July 2021

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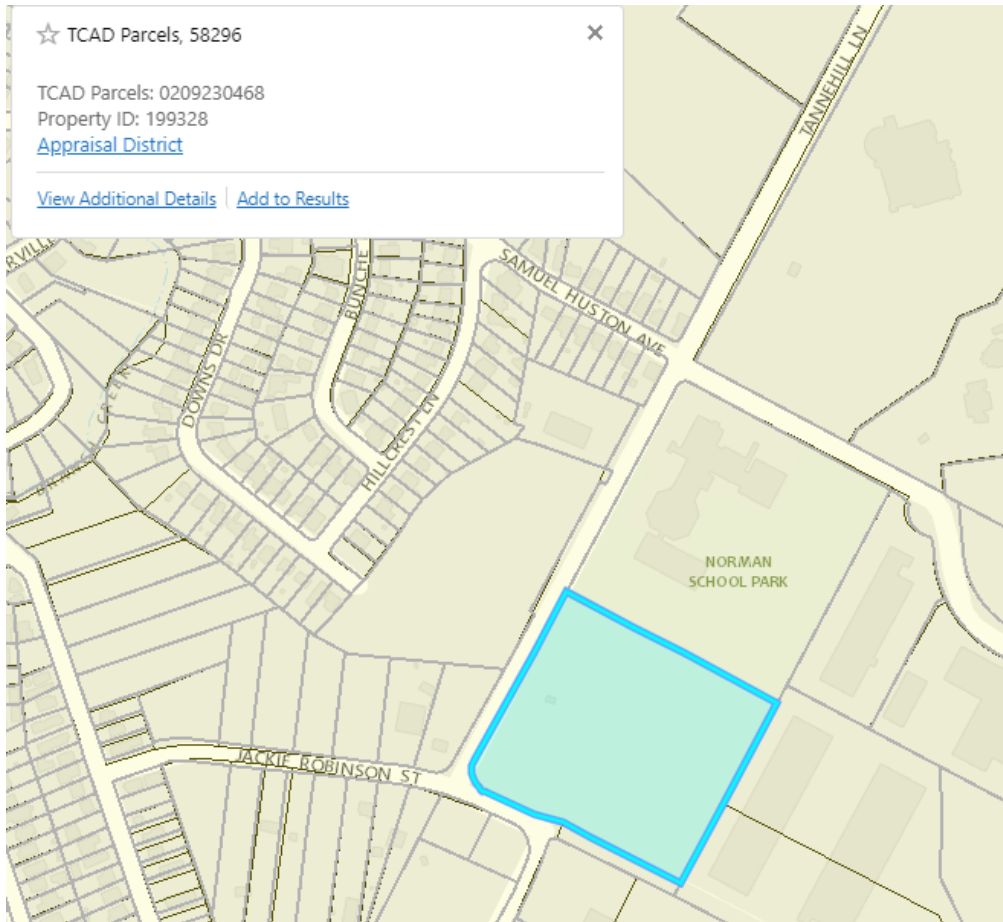
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Site Location

The site is located at the northeast intersection of Jackie Robinson Street and Tannehill Lane in Austin, Texas 78721. The site is situated in the Full Purpose City of Austin limits, in Travis County. The area of the site is approximately 7.96 acres and is currently undeveloped. The site contains a small wooden shed, the occasional fence, and some overhead utility poles and guy wires. The proposed development will consist of multifamily units with the options to rent or own. The multifamily unit count is 294.

**Travis County Appraisal District**

The site is made up of 1 tract, and is described as follows:

Property			
Account			
Property ID:	199328	Legal Description:	ABS 22 SUR 29 TANNEHILL J C ACR 8.922
Geographic ID:	0209230468	Zoning:	SF3
Type:	Real	Agent Code:	
Property Use Code:			
Property Use Description:			
Protest			
Protest Status:			
Informal Date:			
Formal Date:			
Location			
Address:	TANNEHILL LN TX 78723	Mapsc0:	
Neighborhood:	FORMERLY EEXMP	Map ID:	021021
Neighborhood CD:	_EEXMP		
Owner			
Name:	AUSTIN HOUSING FINANCE CORPORATION	Owner ID:	180087
Mailing Address:	3000 S IH 35 STE 300 AUSTIN , TX 78704-6536	% Ownership:	100.0000000000%
		Exemptions:	EX-XV

Subdivision Plat

The site is not currently platted. A Land Status Determination Application can be requested for development.

Zoning, FAR, and Density

The site is currently zoned Public – Neighborhood Plan Combining District (P-NP) with a Future Land Use of Civic. Zoning Overlays for the site include MLK-183, East MLK Combined NPA, Airport-Controlled Compatible Land Use Area. Zoning Ordinances 021107-Z-12b and 99-0225-70(b) are included in the Appendix. The proposed zoning is MF-2 and would allow for:

- maximum impervious cover of 60%
- maximum building coverage of 50%
- maximum heights of 40' per zoning
 - Per Ordinance No. 20190509-027 the height can be increased by 1.5 for Type 2 S.M.A.R.T. Housing to 60'.
- minimum setbacks are 25' for front yard, 15' for street side yard, 5' for interior side yard, and 10' rear yard.
 - Per Ordinance No. 20190509-027 the front and rear yard setback may be reduced by 50%.

Floor to area ratio (FAR) does not apply for MF-2 zoning. Zoning indicates that the maximum unit per acre is 23. A waiver can be granted for site area requirements for higher density zones per Affordability Unlocked Bonus Program Requirements

Easements

The site does not appear to have existing easements per survey prepared in 2018 and City of Austin Property Profile.

Streets, Driveways, Right of Way Access, and Right of Way Dedication

The site has frontage along Tannehill Lanes and Jackie Robinson Street. Per Austin Strategic Mobility Plan (ASMP) Tannehill Lane is a 2-lane local road with sidewalks along the east and a 70' ROW. Jackie Robinson Street is also a 2-lane local road with without sidewalks and a 70' ROW.

It is anticipated that sidewalks be required along Jackie Robinson Street. Per Subchapter E, public sidewalks are required along Urban Roadways, to include a 7' planting zone and 5' clear zone. See image below.

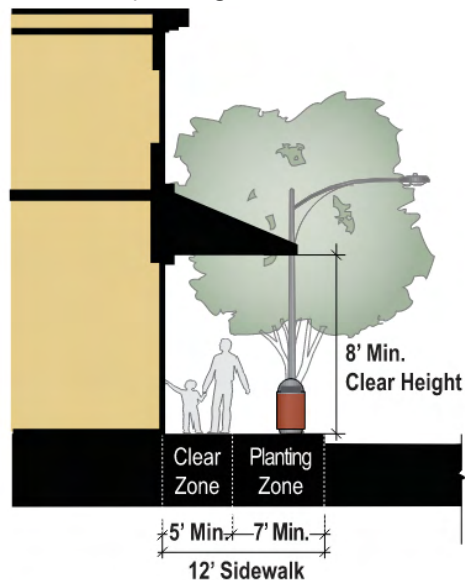


Figure 19:

Urban roadway sidewalk width requirements. Note that street trees are optional on urban roadways.

Right-of-Way (ROW) Dedication

ROW dedication is not expected at this time.

Traffic Impact Analysis (TIA)

Per City of Austin, a TIA is required if the expected number of trips generated by the development exceeds 2,000 vehicle trips per day. A neighborhood traffic analysis is required if the project has access only to a residential local or collector street and the expected number of vehicle trips generated by the development exceeds 300 vehicle trips per day over the existing uses. MF-2 zoning and 294 units yields 1940 trips, therefore a TIA will not be required. A Neighborhood Traffic Analysis will be required since more than 300 trips are generated.

Parking

The proposed unit count of 1BR = 51, 2BR = 156, and 3BR = 87 yields 606 parking stalls. S.M.A.R.T. Housing incentives allow for modified parking requirements. Bicycle parking will be the greater of 5 spaces, or 5% of the motor vehicle spaces required.

Landscape

Landscape plans must be prepared and submitted for review by a licensed Landscape Architect in The Full Purpose City Limits. These plans will include landscape islands, street trees, etc.

Municipal Utility Districts

The site is not part of any existing Municipal Utility District (MUD).

Water and Wastewater Availability

The site is in the Full Purpose City of Austin Limits and will be serviced by Austin Water Utility.

Water Line

Austin Water Utility currently has 8" DI lines along Tannehill Lane and Jackie Robinson Street. A 6" domestic waterline can accommodate for the 294 multifamily units.

Wastewater Line

Austin Water Utility currently has 8" PVC lines along Tannehill Lane and Jackie Robinson Street. An 8" wastewater line can service the proposed 294 multifamily units.

Water and Wastewater Impact Fees

Impact fee due for new development shall be collected at the time the City issues a building permit.

The impact fees to be collected for new development are calculated by:

1. Adding the number of service units attributable to all meters purchased for the development.
2. Multiplying the total number of service units by the fee to be collected for each service unit for water or wastewater service; and
3. subtracting any applicable credits or discounts.

The current City of Austin water and wastewater impact fees per service unit are presented in the table below. Please note other fees may apply including meter and inspection fees.

WATER FEE	WASTEWATER FEE
\$4,700	\$2,500

Determination of Service Units

The size and type of water meter purchased determines number of service units in accordance with the following schedule:

Meter Size (Inch)	Type	Service Units
5/8	Simple	1
¾	Simple	1.5
1	Simple	2.5
1½	Simple	5
2	Simple	8
2	Compound	8
2	Turbine	10
3	Compound	16

3	Turbine	24
4	Compound	25
4	Turbine	42
6	Compound	50
8	Compound	80
6	Turbine	92
10	Compound	115
8	Turbine	160
10	Turbine	250
12	Turbine	330

Determination of Meter Size

The operating and physical characteristics listed in the table below shall determine the nominal size of meters.

Table 1 Characteristics of displacement-type meters

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Meter Size		Safe Maximum Operating Capacity*		Maximum Pressure Loss at Safe Maximum Operating Capacity		Recommended Maximum Rate for Continuous Operations†		Minimum Test Flow‡		Normal Test Flow Limits‡		Maximum Number of Disc Rotations or Piston Oscillations per		
in.	(mm)	gpm	(m ³ /h)	psi	(kPa)	gpm	(m ³ /h)	gpm	(m ³ /h)	gpm	(m ³ /h)	10 gal	ft ³	(0.01 m ³)
½	(13)	15	(3.4)	15	(103)	7.5	(1.7)	¼	(0.06)	1–15	(0.2–3.4)	875	657	(231)
½ × ¾	(13 × 20)	15	(3.4)	15	(103)	7.5	(1.7)	¼	(0.06)	1–15	(0.2–3.4)	875	657	(231)
⅝	(15)	20	(4.5)	15	(103)	10.0	(2.3)	¼	(0.06)	1–20	(0.2–4.5)	580	435	(154)
⅝ × ¾	(15 × 20)	20	(4.5)	15	(103)	10.0	(2.3)	¼	(0.06)	1–20	(0.2–4.5)	580	435	(154)
¾	(20)	30	(6.8)	15	(103)	15.0	(3.4)	½	(0.11)	2–30	(0.5–6.8)	333	250	(88)
1	(25)	50	(11.4)	15	(103)	25.0	(5.7)	¾	(0.17)	3–50	(0.7–11.4)	153	115	(40)
1½	(40)	100	(22.7)	15	(103)	50.0	(11.3)	1½	(0.34)	5–100	(1.1–22.7)	67	50	(18)
2	(50)	160	(36.3)	15	(103)	80.0	(18.2)	2	(0.45)	8–160	(1.8–36.3)	40	30	(11)

* Operation at this flow rate should not exceed 10 percent of usage, or 2 hr in a 24-hr period.

† See Sec. B.5.1.

‡ See Sec. 4.2.8.

Topography, Slopes, Drainage Patterns, and Soils

Per survey from Landesign Services Inc. dated 7/13/2018, the site has a high point at the northern property line, near the eastern property line. Natural slopes at between 0 and 8%, varying throughout the site. The site generally drains to the southwest with a small section draining to the southeast.

The NRCS soils for the site consist of Altoga soils and Urban land, Houston Black soils, and Travis soils. The soils mostly classification C and some D, described as very slow infiltrating and transmissivity. See figure below.

Travis County, Texas (TX453)			
Travis County, Texas (TX453)			
Map Unit Symbol	Map Unit Name	Acres in AOI	Percent of AOI
AID	Altoga soils and Urban land, 2 to 8 percent slopes	0.0	0.0%
HsD	Houston Black soils and Urban land, 0 to 8 percent slopes	2.5	28.4%
TuD	Travis soils and urban land, 1 to 8 percent slopes	6.4	71.6%
Totals for Area of Interest		8.9	100.0%



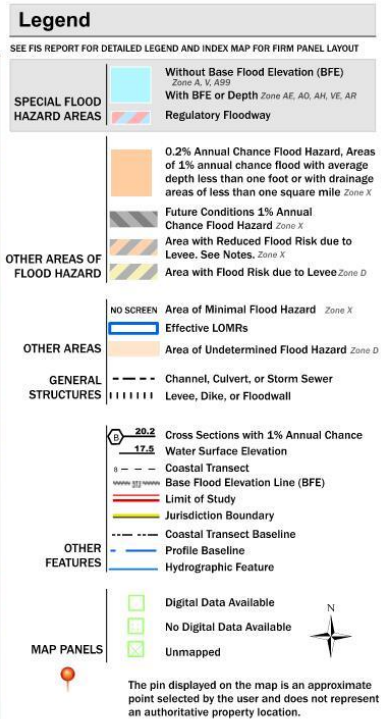
Stormwater Infrastructure

Storm Infrastructure is adjacent to the site along Tannehill Lane and Jackie Robinson Street as 18" RCP.

Floodplain Status and Restrictions:

No portion of the site is located within the 100-year, flood hazard zone, per FEMA FIRM panel 48453C0470K dated January 6, 2016. See figure for reference.

National Flood Hazard Layer FIRMette

**Creek Buffers and Waterway Setbacks**

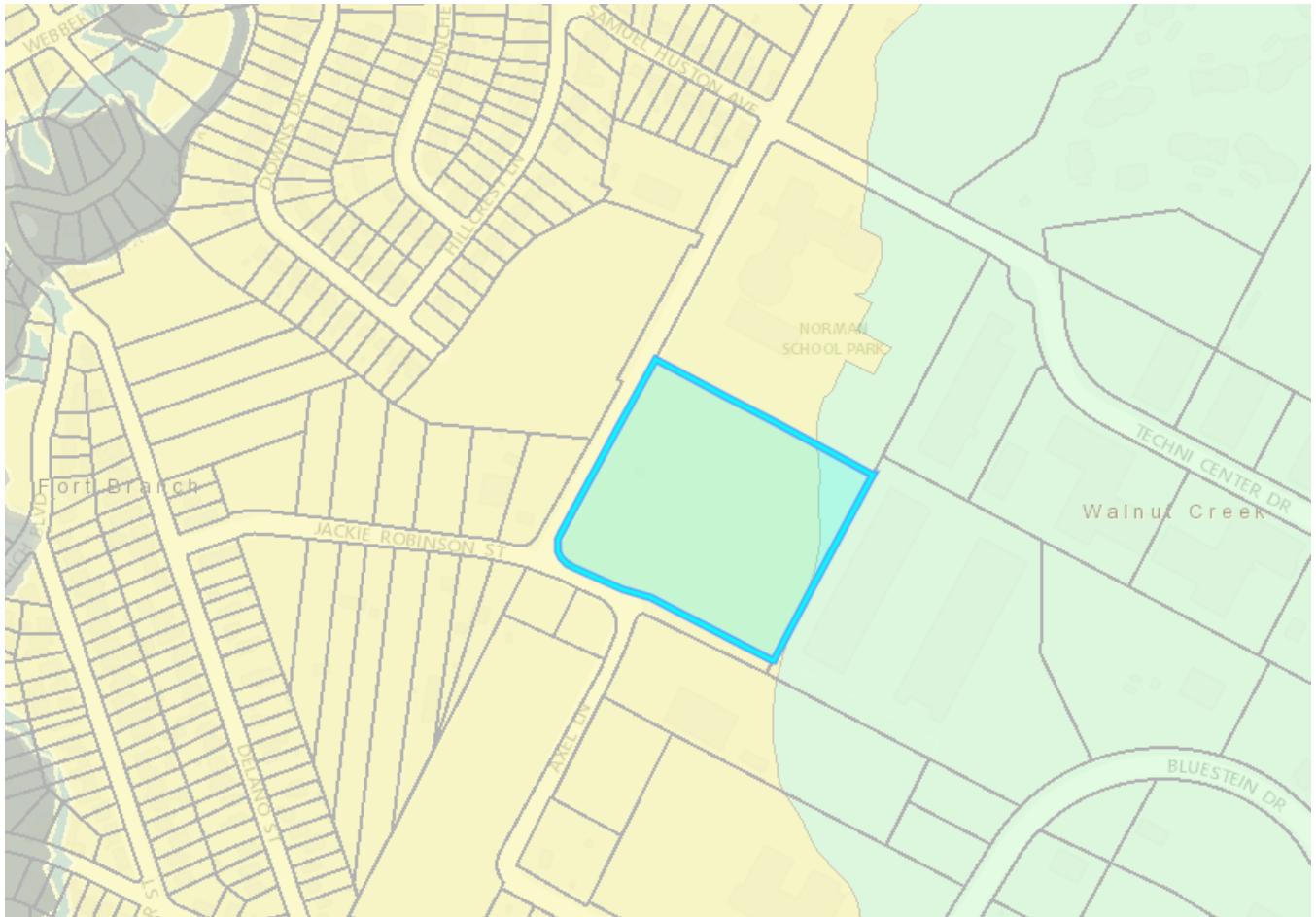
The site is not located on or adjacent to creek buffers or waterway setbacks as determined by the City of Austin's Property Profile.

Edwards Aquifer

The site is not located within the Edwards Aquifer Recharge or Contributing Zone.

Watershed

The site is within the Walnut Creek Watershed and Fort Branch Watershed, both in the Desired Development Zone. Fort Branch Watershed is an Urban Watershed, while Walnut Creek Watershed is Suburban Inside City Limits. Stormwater may be diverted from one watershed to another, not to exceed 20% of gross site area or less than 1 acre, whichever is smaller, per LDC 25-8-365. Existing drainage patterns will need to be maintained as much as possible, and no adverse impacts to the environment or drainage can result from the diversion.



City of Austin Watershed Protection Ordinance Regulations Summary Table

Effective: October 28, 2013

Red Text = Change from Previous Requirements

REGULATORY CATEGORY	ZONE	DESIRED DEVELOPMENT ZONE			DRINKING WATER PROTECTION ZONE		
		Urban	Suburban City Limits	Suburban N. Edwards / ETJ	Water Supply Suburban	Water Supply Rural	Barton Springs Zone
Impervious Cover (IC)	Calculation Basis	Gross Site Area	Gross Site Area	Gross Site Area	Net Site Area	Net Site Area	Net Site Area
	Transfers Allowed	No	Yes	Yes	Yes	Yes	No
	Uplands: Max Pct IC	Max Pct	Max Pct	Max Pct	Max Pct	Max Density	Max Pct [No Transfers]
	Single-Family Res. (Lot > 5750 ft²)	No Watershed IC Limit: Zoning Limits only	Std / w Transfer	Std / w Transfer	Std / w Transfer	Std / w Transfer	1 unit per 2 ac.
	Single-Family Res. (Lot < 5750 ft²)		50% / 60%	45% / 50%	30% / 40%	1 unit per 2 ac.	1 unit per 1 ac.*
	Multi-Family Residential Max Pct		55% / 60%	55% / 60%			
	Commercial Max Pct		60% / 70%	60% / 65%	40% / 55%	20% / 25%	R / BC / C ** 15% / 20% / 25% for all uses
			80% / 90%	65% / 70%			
	WQ Transition Zone: Max Pct IC (outside floodplain)	Not Applicable	Not Applicable	Not Applicable	18%	1 SF unit / 3 acres	1 SF unit / 3 acres
	Critical WQ Zone: Max Pct IC	None (except road crossings)	None (except limited road crossings)	None (except limited road crossings)	None (except limited road crossings)	None (except limited road crossings)	None (except limited road crossings)
	Critical Environmental Feature (CEF) Max Pct IC	None within 150 to 300 ft radius	None within 150 to 300 ft radius	None within 150 to 300 ft radius	None within 150 to 300 ft radius	None within 150 to 300 ft radius	None within 150 to 300 ft radius
Waterway Classifications	Minor		64 – 320 acres	64 – 320 acres	64 – 320 acres	64 – 320 acres	64 – 320 acres
	Intermediate	64 acres	320 – 640 acres	320 – 640 acres	320 – 640 acres	320 – 640 acres	320 – 640 acres
	Major		over 640 acres	over 640 acres	over 640 acres	over 640 acres	over 640 acres
	Notes	Urban creeks not classified					
Waterway Setbacks	Critical Water Quality Zone						
	Minor		100 ft.	100 ft.	50 – 100 ft.	50 – 100 ft.	50 – 100 ft.
	Intermediate	50 – 400 ft.	200 ft.	200 ft.	100 – 200 ft.	100 – 200 ft.	100 – 200 ft.
	Major		300 ft.	300 ft.	200 – 400 ft.	200 – 400 ft.	200 – 400 ft.
	Notes	No CWQZ Downtown					
		Between min and max width, coincides with the 100-year fully-developed floodplain	"Buffer averaging" allows sites to reduce width of buffers by up to one-half if the overall amount protected remains the same		Between min and max width, coincides with the 100-year fully-developed floodplain		
	Water Quality Transition Zone						
	Minor				100 ft.	100 ft.	100 ft.
	Intermediate	Not Required	Not Required	Not Required	200 ft.	200 ft.	200 ft.
	Major				300 ft.	300 ft.	300 ft.
Water Quality Controls	Variances from Buffers	Administrative under certain conditions	Must apply for Land Use Commission variance		Must apply for Land Use Commission variance.		
	Treatment Standard	Sedimentation/ Filtration	Sedimentation/ Filtration	Sedimentation/ Filtration	Sedimentation/ Filtration	Sedimentation/ Filtration	Non-Degradation
	When Required	All new/redeveloped if IC > 8,000 sq. ft.	All new/redeveloped if IC > 8,000 sq. ft.	All new/redeveloped if IC > 8,000 sq. ft.	All new/redeveloped if IC > 8,000 sq. ft.; all IC in WQTZ	All new/redeveloped if IC > 8,000 sq. ft.; all IC in WQTZ	All development
	Allowed in Creek Buffer	CWQZ = Yes per ECM WQTZ = N/A	CWQZ = Yes per ECM WQTZ = N/A	CWQZ = Yes per ECM WQTZ = N/A	CWQZ = No WQTZ = Yes per ECM	CWQZ = No WQTZ = Yes per ECM	CWQZ = No WQTZ = Yes per ECM
	Alternative Strategies Allowed	Yes	Yes	Yes	Yes	Yes	No
	Optional Payment-in-Lieu	Yes	No	No	No	No	No

Key: CWQZ = Critical Water Quality Zone; ETJ = Extra-Territorial Jurisdiction; IC = Impervious Cover; SF = Single-Family Residential; WQ = Water Quality; WQTZ = Water Quality Transition Zone

Storm Water Quality and Detention RequirementsStorm Water Quality Requirements

Per 1.6.2- ECM, the primary control strategy for water quality basins is to capture a minimum volume of stormwater runoff for treatment, and to release the treated volume in forty-eight (48) hours or as specified.

Stormwater Control Measures (SCMs) shall be designed to treat stormwater runoff from the development site.

SCMs are:

- Partial sedimentation with sand filtration or biofiltration controls.
- Full sedimentation with sand filtration or biofiltration controls.
- Retention Irrigation controls that are not subject to compliance with the SOS ordinance.
- Rainwater Harvesting controls.
- Rain Gardens.
- Porous Pavement.

Fee in Lieu of Water Quality is an option for the portion of the site within the Fort Branch (Urban) Watershed. Fee in Lieu is not possible for the remainder of the site in the Walnut Creek (Suburban) Watershed.

Detention Requirements

Per 8.3.1- DCM, a detention ponds shall be designed to reduce post-development peak rates of discharge to existing pre-development peak rates of discharge for the 2-, 10-, 25- and 100-year storm events at each point of discharge from the development site.

Tree Ordinance

Per section 25-8 Subchapter B, a person may not remove a protected tree (19" and greater) or Heritage Tree (24" and greater) unless the director has issued a permit for the removal. Heritage Trees include the following species:

- Ash, Texas
- Cypress, Bald
- Elm, American
- Elm, Cedar
- (e)Madrone, Texas
- Maple, Bigtooth
- All Oaks
- Pecan
- Walnut, Arizona
- Walnut, Eastern Black

Mitigation Measures

A standard formula of one caliper inch of replacement value is equivalent to \$200.00, or \$75 for certified affordable developments (NOTE: This option is not intended to facilitate the excessive removal of trees.) Trees have varying values based upon numerous tree and site conditions (3.5.1 ECM). The following mitigation rates apply for medium valued trees; however, the City Arborist may raise or reduce these rates for high or low valued trees:

- Heritage - 300%
- Greater than 19 inches diameter and located in Appendix F, ECM - 100%
- 8 to 18.9 diameter inches and located in Appendix F, ECM - 50%
- Greater than 19 inches diameter and greater and not located in Appendix F, ECM - 50%
- 8 to 18.9 inches diameter and not located in Appendix F, ECM - 25%

Appendix A – Recorded Deeds



Special Warranty Deed

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

THE STATE OF TEXAS §

KNOW ALL BY THESE PRESENTS:

COUNTY OF TRAVIS §

CITY OF AUSTIN, a Texas home-rule city and municipal corporation ("**Grantor**"), for Ten Dollars (\$10.00) and other good and valuable consideration paid by the **AUSTIN HOUSING FINANCE CORPORATION**, a Texas public non-profit corporation organized under chapter 394 of the Texas local government code ("**Grantee**"), the receipt and sufficiency of which are hereby acknowledged and for the payment of which no lien, express or implied is retained, has GRANTED, SOLD AND CONVEYED, and by these presents does GRANT, SELL AND CONVEY, unto Grantee the real property ("**Property**") described on Exhibits "A-1" & "A-2" attached hereto and made a part hereof, together with all improvements located thereon.

TO HAVE AND TO HOLD the Property, together with the rights and appurtenances thereto belonging, unto Grantee and Grantee's heirs, successors and assigns, forever; and Grantor does hereby bind Grantor and Grantor's heirs, successors and assigns to WARRANT AND FOREVER DEFEND the Property unto Grantee and Grantee's heirs, successors and assigns, against every person whomsoever lawfully claiming or to claim the same or any part thereof by, through or under Grantor, but not otherwise.

However, this conveyance is made subject to the liens securing standby fees, taxes and assessments by any taxing authority for the current year and subsequent years, and subsequent taxes and assessments (including penalties and interest) by any taxing authority for prior years due to change in land usage or ownership (collectively, "Ad Valorem Taxes"), as well as to all matters set forth on Exhibit "B" attached hereto and made a part hereof to the extent that they are in effect and apply to the Property (collectively, "**Permitted Exceptions**"). Grantee by acceptance of delivery of this deed assumes and agrees to perform all of Grantor's obligations under the Permitted Exceptions and to pay the Ad Valorem Taxes.

IT IS UNDERSTOOD AND AGREED THAT GRANTEE ACCEPTS THE PROPERTY IN IT'S "AS IS, WHERE IS" CONDITION WITH ALL FAULTS AND WITH ANY AND ALL LATENT AND PATENT DEFECTS. IT IS FURTHER UNDERSTOOD AND AGREED THAT EXCEPT FOR THE SPECIAL WARRANTIES OF TITLE MADE HEREIN GRANTOR HAS NOT MADE AND SPECIFICALLY DISCLAIMS ANY WARRANTIES OR REPRESENTATIONS OF ANY KIND OR CHARACTER, ORAL OR WRITTEN, EXPRESS OR IMPLIED, WITH RESPECT TO THE PROPERTY, INCLUDING, BUT NOT LIMITED TO, WARRANTIES OR REPRESENTATIONS AS TO MATTERS OF TITLE (OTHER THAN THE WARRANTY OF TITLE SET FORTH HEREIN), ZONING, TAX CONSEQUENCES, PHYSICAL OR ENVIRONMENTAL CONDITIONS, AVAILABILITY OF ACCESS (SPECIFICALLY MAKING NO WARRANTY OF COMPLIANCE WITH THE REQUIREMENTS OF THE AMERICANS WITH DISABILITIES ACT OF 1990, AS AMENDED), INGRESS OR EGRESS, OPERATING HISTORY OR PROJECTIONS, VALUATION, GOVERNMENTAL APPROVALS, GOVERNMENTAL REGULATIONS OR ANY OTHER MATTER OR THING RELATING TO OR AFFECTING THE PROPERTY INCLUDING, WITHOUT LIMITATION: (i) THE NATURE AND CONDITION OF THE PROPERTY, INCLUDING, WITHOUT LIMITATION, THE WATER, SOIL AND GEOLOGY AND THE SUITABILITY THEREOF AND OF THE PROPERTY FOR ANY AND ALL ACTIVITIES AND USES WHICH GRANTEE MAY ELECT TO CONDUCT

THEOREN, AND THE EXISTENCE OF ANY ENVIRONMENTAL HAZARDS OR CONDITIONS THEREON (INCLUDING THE PRESENCE OF ASBESTOS) OR COMPLIANCE WITH ALL APPLICABLE LAWS, RULES OR REGULATIONS; (ii) THE VALUE, CONDITION, MERCHANTABILITY, MARKETABILITY, PROFITABILITY, SUITABILITY OR FITNESS FOR A PARTICULAR USE OR PURPOSE OF THE PROPERTY; (iii) THE MANNER OR QUALITY OF THE CONSTRUCTION OR MATERIALS INCORPORATED INTO ANY OF THE PROPERTY; AND (iv) THE MANNER, QUALITY, STATE OF REPAIR OR LACK OF REPAIR OF THE PROPERTY. GRANTEE AGREES THAT WITH RESPECT TO THE PROPERTY, GRANTEE HAS NOT RELIED UPON AND WILL NOT RELY UPON, EITHER DIRECTLY OR INDIRECTLY, ANY REPRESENTATION OR WARRANTY OF GRANTOR OR ANY AGENT OF GRANTOR EXCEPT AS EXPRESSLY SET FORTH IN THE PURCHASE AND SALE AGREEMENT. GRANTEE REPRESENTS THAT GRANTEE IS A KNOWLEDGEABLE PURCHASER OF REAL ESTATE AND THAT GRANTEE IS RELYING SOLELY ON GRANTEE'S OWN EXPERTISE AND THAT OF GRANTEE'S CONSULTANTS, AND THAT GRANTEE HAS CONDUCTED SUCH INSPECTIONS AND INVESTIGATIONS OF THE PROPERTY, INCLUDING, BUT NOT LIMITED TO, THE PHYSICAL AND ENVIRONMENTAL CONDITIONS THEREOF INCLUDING THE POSSIBLE PRESENCE OF ENVIRONMENTAL CONTAMINATION, AND SHALL RELY UPON SAME, AND SHALL ASSUME THE RISK THAT ADVERSE MATTERS, INCLUDING, BUT NOT LIMITED TO, ADVERSE PHYSICAL AND ENVIRONMENTAL CONDITIONS, MAY NOT HAVE BEEN REVEALED BY GRANTEE'S INSPECTIONS AND INVESTIGATIONS. GRANTEE ACKNOWLEDGES AND AGREES THAT UPON CLOSING, GRANTOR IS SELLING AND CONVEYING TO GRANTEE AND GRANTEE IS ACCEPTING THE PROPERTY "AS IS, WHERE IS, WITH ALL FAULTS" AND WITH ANY AND ALL LATENT AND PATENT DEFECTS, AND GRANTEE FURTHER ACKNOWLEDGES AND AGREES THAT THERE ARE NO ORAL AGREEMENTS, WARRANTIES OR REPRESENTATIONS, COLLATERAL TO OR AFFECTING THE PROPERTY BY GRANTOR, ANY AGENT OF GRANTOR OR ANY THIRD PARTY. GRANTOR IS NOT LIABLE OR BOUND IN ANY MANNER BY ANY VERBAL OR WRITTEN STATEMENTS, REPRESENTATIONS, OR INFORMATION PERTAINING TO THE PROPERTY FURNISHED BY GRANTOR, ANY AGENT, EMPLOYEE OR SERVANT OF GRANTOR, OR ANY OTHER PERSON, EXCEPT FOR THE SPECIAL WARRANTIES CONTAINED IN THIS DEED AND THE REPRESENTATIONS AND WARRANTIES MADE BY THE GRANTOR IN THE PURCHASE AND SALE AGREEMENT. GRANTEE FURTHER ACKNOWLEDGES AND AGREES THAT THE PROVISIONS OF THIS PARAGRAPH WERE A MATERIAL FACTOR IN THE DETERMINATION OF THE PURCHASE PRICE FOR THE PROPERTY.

Grantee's address:

City of Austin
Neighborhood Housing and Community Development
1000 East 11th Street, Ste. 200
Austin, Texas 78702

Executed this 30th day of April, 2018, to be effective the 1st day of May, 2018.

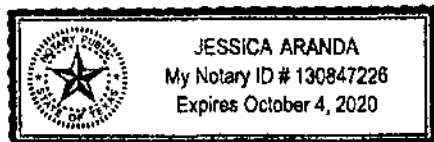
CITY OF AUSTIN, a Texas home-rule city and
municipal corporation

ms By: Lauraine Rizer
Lauraine Rizer, Officer
Office of Real Estate Services

THE STATE OF TEXAS

COUNTY OF TRAVIS

This instrument was acknowledged before me on the 30th day of April, 2018, by
Lauraine Rizer, Officer of the Office of Real Estate Services of the City of Austin, a Texas home-
rule city and municipal corporation, on behalf of said corporation.



[Signature]
Notary Public, State of Texas

Unofficial Document
AGREED TO AND ACCEPTED this 30 day of April, 2018, to be effective the 1st day of May, 2018.

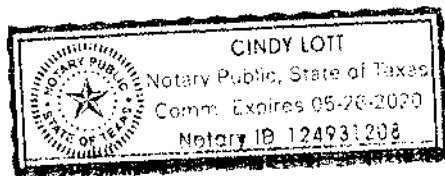
AUSTIN HOUSING FINANCE CORPORATION, a Texas non-profit corporation

By: 
Rosie Truelove, Treasurer

THE STATE OF TEXAS

COUNTY OF TRAVIS

This instrument was acknowledged before me on the 30 day of April, 2018, by Rosie Truelove, Treasurer, Austin Housing Finance Corporation, a Texas public non-profit corporation, on behalf of said corporation.




Notary Public, State of Texas

Exhibit "A-1" Special Warranty Deed: Property

BEING 1.234 ACRES OF LAND OUT OF THE GEORGE W. DAVIS SURVEY NO. 15, IN TRAVIS COUNTY, TEXAS, AND BEING COMPRISED OF TWO TRACTS: TRACT ONE BEING THE REMAINDER OF LOTS 82-86, DIXIE TERRACE, A SUBDIVISION OF RECORD IN VOLUME 5, PAGE 65, OF THE PLAT RECORDS OF TRAVIS COUNTY TEXAS; AND TRACT TWO BEING THE WESTERLY PORTION OF THE REMAINDER OF A 22.32 ACRE TRACT OF LAND CONVEYED FROM W.L. MAYFIELD TO THE AUSTIN INDEPENDENT SCHOOL DISTRICT BY REPUTED INSTRUMENT OF RECORD IN VOLUME 2059, PAGE 318, OF THE DEED RECORDS OF TRAVIS COUNTY TEXAS, AND BEING MORE PARTICULARLY DESCRIBED BY METES AND BOUNDS AS FOLLOWS:

BEGINNING at a 1/2" rebar found for the point of intersection of the north right-of-way line of Doris Drive (60' R.O.W.) and the west right-of-way line of Hathaway Drive (60' R.O.W.), being in the south line of the remainder of said Lot 86, Dixie Terrace, and being a point of tangency in the westerly line of a 1.07 acre right-of-way dedication of record in Volume 2375, Page 120 of the Deed Records of Travis County, Texas;

THENCE North 60°06'00" West (record - North 60°06' West - Basis of Bearings), along the south line of the remainder of Lots 86, 85, 84, 83, and 82, Dixie Terrace, the westerly line of said 1.07 acre R.O.W. dedication, and the north right-of-way line of said Doris Drive, a distance of 225.38 feet (record - 224.85 feet) to a 1/2" rebar found for the southwest corner of the remainder of Lot 82, Dixie Terrace, the southeast corner of the remainder of Lot 81, Dixie Terrace, and being an angle point in the westerly line of the 1.07 acre R.O.W. dedication;

THENCE North 30°41'48" East (record - North 30°48' East), along the west line of the remainder of Lot 82, Dixie Terrace and the east line of said remainder of Lot 81, Dixie Terrace, a distance of 114.75' (record - 115.00 feet) to a 1/2" rebar found for the northwest corner of the remainder of Lot 82, Dixie Terrace, the northeast corner of the remainder of Lot 81, Dixie Terrace, and being in the south line of Lot 1, Block D, Bowling Green, a subdivision of record in Volume 4, Page 327 of the Plat Records of Travis County, Texas;

THENCE South 60°06'00" East (record - South 60°06' East), along the north line of the remainder of Lot 82, Dixie Terrace and the south line of said Lot 1, Block D, Bowling Green, a distance of 30.13 feet (record - 30.13 feet) to a 1/2" rebar set with plastic cap which reads "Baseline Inc" for the southeast corner of Lot 1, Block D, Bowling Green and the southwest corner of said westerly portion of a remainder of a 22.32 acre tract;

THENCE North 31°59'46" East (record - North 32°03' East), along the west line of the westerly portion of the remainder of a 22.32 acre tract and the east line of Lots 1-7, Block D,

Bowling Green, passing at a distance of 292.75 feet (record - 292.48 feet) a 1/2" rebar found for the northeast corner of Lot 5, Block D, Bowling Green and the southeast corner of Lot 6, Block D, Bowling Green, and continuing for a further distance of 52.52 feet (record - 52.56 feet) to an iron pipe found for the northeast corner of said Lot 6, Block D, Bowling Green and the southeast corner of Lot 7, Block D, Bowling Green, and continuing for a total distance of 391.05 feet to a 1/2" rebar set with plastic cap which reads "Baseline Inc." for the north corner of the portion of a remainder of a 22.32 acre tract, being in the east line of said Lot 7, Block D, Bowling Green, also being in the westerly line of the 1.07 acre R.O.W. dedication, and also being in the west right-of-way line of said Hathaway Drive, from which an iron pipe found in the westerly line of the 1.07 acre R.O.W. dedication, the west right-of-way line of Hathaway Drive, and being an angle point in the east line of Lot 11A, Block D, Resubdivision of Lots 8, 9, 10, & 11, Block D, Bowling Green, a subdivision of record in Volume 36, Page 9 of the Plat Records of Travis County, Texas, bears North $31^{\circ}59'46''$ East a distance of 16.34 feet (record - North $32^{\circ}03'$ East a distance of 16.31 feet), and from said iron pipe an iron pipe found for the northeast corner of said Lot 11A, Block D, Resubdivision of Lots 8, 9, 10, & 11, Block D, Bowling Green, and being the point of intersection of the west right-of-way line of Hathaway Drive and the south right-of-way line of Shamrock Avenue (50' R.O.W.), bears North $14^{\circ}06'30''$ East a distance of 100.88 feet (record - North $14^{\circ}12'$ East a distance of 100.48 feet);

THENCE along the east line of the westerly portion of the remainder of a 22.32 acre tract, the westerly line of the 1.07 acre R.O.W. dedication, and the west right-of-way line of Hathaway Drive, the following two (2) courses

1. South $14^{\circ}04'46''$ West a distance of 203.69 feet (record - South $14^{\circ}09'$ West a distance of 204.29 feet) to a 1/2" rebar found for a point of curvature, from which a 1/2" rebar found for a point of curvature in the easterly line of the 1.07 acre R.O.W. dedication, the east right-of-way line of Hathaway Drive, and the west line of the easterly portion of said remainder of a 22.32 acre tract that is occupied by Burnet Middle School, bears South $73^{\circ}38'41''$ East a distance of 59.87 feet (record - 60.00 feet);
2. Along a tangential curve to the left, having a radius of 478.65 feet (record - 478.65 feet), an arc length of 187.09 feet (record - 186.85 feet), a delta angle of $22^{\circ}23'44''$ (record - $22^{\circ}23'24''$), and having a chord which bears South $02^{\circ}53'46''$ West a distance of 185.90 feet (record - South $02^{\circ}58'$ West a distance of 185.67 feet) to a 1/2" rebar found for a point of reverse curvature, from which a 1/2" rebar found for a point of reverse curvature in the easterly line of the 1.07 acre R.O.W. dedication, the east right-of-way line of Hathaway Drive, and the west line of said easterly portion of the remainder of a 22.32 acre tract that is occupied by Burnet Middle School, bears North $81^{\circ}42'16''$ East a distance of 59.77 feet (record - 60.00 feet);

THENCE along the east line of the westerly portion of a remainder of a 22.32 acre tract, the westerly line of the 1.07 acre R.O.W. dedication, the west right-of-way line of Hathaway Drive, and along the east line of the remainder of Lot 85 and the remainder of Lot 86, Dixie Terrace, along a reverse curve to the right having a radius of 260.11 feet (record - 260.11 feet), an arc length of 140.25 feet (record - 139.98 feet), a delta angle of $30^{\circ}53'36''$ (record - $30^{\circ}53'10''$), and having a chord which bears South $07^{\circ}08'22''$ West a distance of 138.56 feet

(record - South $07^{\circ}12'$ West a distance of 138.29 feet) to a $1/2''$ rebar found for a point of compound curvature, from which a $1/2''$ rebar found for a point of reverse curvature in the easterly line of the 1.07 acre R.O.W. dedication, the east right-of-way line of Hathaway Drive, and the west line of the easterly portion of the remainder of a 22.32 acre tract that is occupied by Burnet Middle School, bears South $67^{\circ}11'50''$ East a distance of 59.71 feet (record - 60.00 feet);

THENCE along the east line of the remainder of Lot 86, Dixie Terrace, the westerly line of the 1.07-acre R.O.W. dedication, and the west right-of-way line of Hathaway Drive, along a compound curve to the right having a radius of 14.17 feet (record - 14.17 feet), an arc length of 24.40 feet (record - 24.06 feet), a delta angle of $98^{\circ}40'30''$ (record - $98^{\circ}40'00''$), and having a chord which bears South $71^{\circ}14'23''$ West a distance of 21.50 feet (record - South $71^{\circ}16'$ West a distance of 21.27 feet) to the POINT OF BEGINNING.

This parcel contains 1.234 acres of land, more or less, out of the George W. Davis Survey No. 15, in Travis County, Texas.

Bearing Basis: The south line of a 1.07 acre R.O.W. dedication of record in Volume 2375, Page 120 of the Deed Records of Travis County, Texas being North $60^{\circ}06'$ West, as depicted thereon.

J. Scott Laswell 2/21/8
J. Scott Laswell Date
Registered Professional Land Surveyor
State of Texas No. 5583

File: S:\Projects\AISD Doris Drive\Docs\Field Notes\1.234 Acre Tract M&B.doc
Drawing: S:\Projects\AISD Doris Drive\Dwg\Title Survey.dwg

FIELD NOTES REVIEWED
BY [Signature] DATE: 02-06-2018
CITY OF AUSTIN
PUBLIC WORKS DEPARTMENT

Exhibit "A-2" To Special Warranty Deed: Property

LEGAL DESCRIPTION

BEING 7.96 ACRES (346,642 SQUARE FEET) TRACT OF LAND OUT OF THE J.C. TANNEHILL SURVEY, ABSTRACT 22, SURVEY 29 IN TRAVIS COUNTY, TEXAS. SAID 7.96 ACRE TRACT, ALSO OUT OF A 9.72 ACRE TRACT OF LAND HAVING BEEN CONVEYED TO AUSTIN INDEPENDENT SCHOOL DISTRICT BY INSTRUMENT OF RECORD IN VOLUME 1864, PAGE 178 OF THE DEED RECORDS OF TRAVIS COUNTY, TEXAS. SAID 7.96 ACRE TRACT BEING SHOWN ON THE ACCOMPANYING SKETCH AND MORE PARTICULARLY DESCRIBED BY METES AND BOUNDS AS FOLLOW:

BEGINNING at a $\frac{1}{2}$ " iron rod found at a chain link fence on the east right of way line of Tannehill Lane. Said iron rod being at the northwest corner of the herein described tract, the southwest corner of a 10.00 acre tract conveyed to the Austin Independent School District by instrument of record in Volume 1854, Page 76 of the deed records of Travis County, TX. Said iron rod being approximately 22.6 feet south of a $\frac{1}{2}$ " iron pipe found at the northwest corner of the 9.72 acre tract.

THENCE S61°44'00"E, 644.78 feet along the fenced north line of the herein described tract and the south line of said 10.00 acre tract to a $\frac{1}{2}$ " iron pipe found for the northeast corner of this 7.96 acre AISD tract and the southeast corner of said 10.00 acre AISD tract. Said $\frac{1}{2}$ " iron pipe also being on the west line of Lot 3, Bluestein Park Phase 2 Subdivision recorded in Volume, 86, Page 5A, Plat Records of Travis County, TX. This line is approximately 22.6 feet south of and parallel from the north line of said 9.72 acre tract.

THENCE S28°19'40"W, along the east line of said 7.96 acre Austin Independent School District tract and the west line of said Lot 3, at 304.65 feet and offset 0.14 feet to the left pass a found $\frac{1}{2}$ " iron rod at the southwest corner of said Lot 3 and the northwest corner of Lot 4 of said Bluestein Subdivision, in all a distance of 510.05 feet to a $\frac{1}{2}$ " iron rod set with a plastic cap stamped "MACIAS LP RPLS 4333" on the west line of said Lot 4. Said point also being at the southeast corner of the herein described tract and the northeast corner of a 0.6383 acre tract having been conveyed to the City of Austin for right of way purposes by instrument of record in Volume 7851, Page 981 in the deed records of Travis County, TX.

THENCE N61°40'20"W, 36.56 feet along the south line of the herein described tract and the north line of said 0.6383 acre City of Austin tract to a $\frac{1}{2}$ " iron rod set with a plastic cap stamped "MACIAS LP RPLS 4333" to the point of curvature of a curve to the left.

THENCE the following three courses with the south line of the herein described tract and the north line of said City of Austin tract:

1. With said curve to the left having a radius of 1516.58 feet, a central angle of 12°41'08", and arc length of 335.78 feet and a chord bearing of N67°42'51"W, 335.09 feet to a $\frac{1}{2}$ " iron rod found at the point of reverse curve to the right.
2. Along said curve to the right having a radius of 965.00 feet, a central angle of 10°51'58", and arc length of 183.01 feet and a chord bearing of N68°37'13"W, 182.74 feet to a $\frac{1}{2}$ " iron rod found at a point of curvature of a curve to the left.
3. Thence along said curve to the left having a radius of 835.24 feet, a central angle of 03°41'19", an arc length of 53.77 feet, and a chord bearing of N65°02'14"W, 53.76 feet to a $\frac{1}{2}$ " iron rod set with a plastic cap stamped "MACIAS LP RPLS 4333" for point of curvature of a curve to the right at the northeast curve return of the east right of way line of Tannehill Lane, and the north right of way line of Jackie Robinson Street

THENCE along said curve to the right having a radius of 47.03 feet, a central angle of 82°47'33", and arc length of 67.96 feet, a chord bearing of N12°08'23"W, 62.20 feet to a $\frac{1}{2}$ " iron rod set with a plastic cap marked "MACIAS LP RPLS 4333", to the point of non-tangency of said curve and on the east right of way line of Tannehill Lane, and the west line of the herein described tract of land.

THENCE N28°22'36"E, 522.58 feet with the east right of way line of Tannehill Lane and the west line of the herein described tract of land to the POINT OF BEGINNING and containing 7.96 acres of land.

BEARING BASIS NOTE

The coordinates and bearings shown hereon are based on the Texas Coordinate System (Central Zone-4203 NAD83).

THE STATE OF TEXAS §
§
COUNTY OF TRAVIS §

KNOW ALL MEN BY THESE PRESENTS:

That I, Carmelo L. Macias, a Registered Professional Land Surveyor, do hereby state that the above description is true and correct to the best of my knowledge and belief and that the property described herein was determined by a survey made on the ground under my direction and supervision.

WITNESS MY HAND AND SEAL at Austin, Travis County, Texas, this 21th day of June, 2016, A.D.



Macias & Associates, L.P.
5410 South 1st Street
Austin, Texas 78745
512-442-7875

Carmelo L. Macias
Carmelo L. Macias
Registered Professional Land Surveyor
No. 4333 - State of Texas
- Revision 1 - January 25, 2018

REFERENCES

TCAD PARCEL ID NO. 02-0923-0468
MACIAS & ASSOCIATES, L.P., PROJECT NO. 276-23-16

FIELD NOTES REVIEWED
BY *[Signature]* DATE: *07-06-2016*
CITY OF AUSTIN
PUBLIC WORKS DEPARTMENT

Exhibit "B" To Special Warranty Deed: Permitted Exceptions

1. Easements, rights-of-way, and prescriptive rights, whether of record or not; all recorded restrictions, reservations, covenants, conditions, oil and gas leases, mineral interests outstanding in persons other than Grantor, and other instruments, other than conveyances of the surface fee estate, that affect the Property; validly existing rights of adjoining owners in any walls and fences situated on a common boundary; any discrepancies, conflicts, or shortages in area or boundary lines; any encroachments or overlapping of improvements; all rights, obligations, and other matters arising from and existing by reason of instruments of record in the real property records of Travis County, Texas, and taxes for the year 2018, which Grantee assumes and agrees to pay, and subsequent assessments for that and prior years due to change in land usage, ownership, or both, the payment of which Grantee assumes.
2. Restrictive covenants of record in Volume 945, Page 389 of the Deed Records of Travis County, Texas. (A-1)
3. Any and all easements and building setbacks shown on Plat(s) recorded in Volume 5, Page 65 of the Plat Records of Travis County, Texas. (A-1)
4. Building setbacks of 25 feet to the front lot line, 10 feet to any side street line, and 4 feet to any side lot line and no separate or detached garage or other out-building closer than 35 feet to a side street line, as set forth in instrument recorded in Volume 945, Page 389 of the Deed Records of Travis County, Texas. (A-1)
5. Public utility easement 10 feet in width along the rear property line(s), as set out in instrument(s) recorded in Volume 1066, Page 111, Volume 1061, Page 185, Volume 1061, Page 543, Volume 1110, Page 194 and Volume 1284, Page 461 of the Deed Records of Travis County, Texas. (A-1)
6. The terms, conditions and stipulations of that certain Electric Utility Easement dated July 29, 1998, recorded in Volume 13243, Page 112 of the Real Property Records of Travis County, Texas. (A-1)
7. Electric transmission and/or distribution easement granted to Texas Power and Light Company, by instrument dated July 2, 1936, recorded in Volume 549, Page 396 of the Deed Records of Travis County, Texas. (A-1)
8. Electric transmission and/or distribution easement granted to Texas Power and Light Company, by instrument dated July 13, 1936, recorded in Volume 551, Page 21 of the Deed Records of Travis County, Texas. (A-1)
9. The terms, conditions and stipulations of that certain Temporary Easement dated August 24, 1989, recorded in Volume 11032, Page 994 of the Real Property Records of Travis County, Texas. (A-1)
10. Encroachment of the fences along the westerly property lines as shown on survey dated February 2, 2018, prepared by J. Scott Laswell, Registered Professional Land Surveyor No. 5583 (the "Survey"). (A-1)
11. Apparent easement evidenced by the location of overhead electric line(s) and guy wire(s) outside of a dedicated easement as shown on the Survey. (A-1)

12. Apparent easement evidenced by the location of utility poles outside of a dedicated easement as shown on the Survey. (A-1)
13. The terms, conditions and stipulations of that certain Affordable Housing Restriction dated April 13, 2018, recorded under Document No. 2018055949 of the Official Public Records of Travis County, Texas. (A-1)
14. Electric easement granted to State Board of Control of the State of Texas, by instrument dated June 1, 1934, recorded in Volume 502, Page 630 of the Deed Records of Travis County, Texas. (A-2)
15. Electric easement granted to Texas Power & Light Company, by instrument dated June 1, 1934, recorded in Volume 506, Page 205 of the Deed Records of Travis County, Texas. (A-2)
16. Electric easement granted to Texas Power & Light Company, by instrument dated June 19, 1937, recorded in Volume 567, Page 330 of the Deed Records of Travis County, Texas. (A-2)
17. Electric easement granted to the City of Austin, by instrument dated December 19, 1939, recorded in Volume 651, Page 584 of the Deed Records of Travis County, Texas. (A-2)
18. Pipe line and right of way easement granted to United Gas Pipe Line Company, by instrument dated July 1, 1949, recorded in Volume 961, Page 268 of the Deed Records of Travis County, Texas. Said easement assigned to Texas Gas Service Company, a division of OneOK, Inc. in instrument recorded under Document No. 2003002159, and subsequently assigned to One Gas, Inc. in instrument recorded under Document No. 2014018447, both of the Official Public Records of Travis County, Texas. (A-2)
19. Telephone and electric line easement granted to United Gas Pipe Line Company, by instrument dated October 18, 1949, recorded in Volume 965, Page 599 of the Deed Records of Travis County, Texas. Said easement assigned to Texas Gas Service Company, a division of OneOK, Inc. in instrument recorded under Document No. 2003002159, and subsequently assigned to ONE Gas, Inc. in instrument recorded under Document No. 2014018447, both of the Official Public Records of Travis County, Texas. (A-2)
20. Location of fences, inset and outside of the southern property line and outside of the western and northern property lines as shown on survey dated July 27, 2016, revised January 25, 2018, prepared by Carmelo L. Macias, Registered Professional Land Surveyor No. 4333. (A-2)
21. Apparent easement evidenced by the location of the power poles, guy wires and overhead electric lines outside of a dedicated easement as shown on the Survey. (A-2)
22. The terms, conditions and stipulations of that certain Affordable Housing Restriction dated April 13, 2018, recorded under Document No. 2018055931 of the Official Public Records of Travis County, Texas. (A-2)

After Recording Return To:

City of Austin
Office of Real Estate Services
P.O. Box 1088
Austin, Texas 78767-8839

Attn: Marsha L. Schulz
File #: 4928.01 & .02
TCAD #: 02-4107-0628 & 02-0923-0468
Project: Doris Drive/Tannehill Lane Transfer (Council Approval: 04/26/18, Item #13)

Recorder's Memorandum: At the time of recordation this instrument was found to be inadequate for the best reproduction, because of illegibility, carbon or photocopy, discolored paper, etc. All blockouts, additions and changes were present at the time the instrument was filed and recorded.

FILED AND RECORDED

OFFICIAL PUBLIC RECORDS

Dana DeBeauvoir

May 01, 2018 01:20 PM

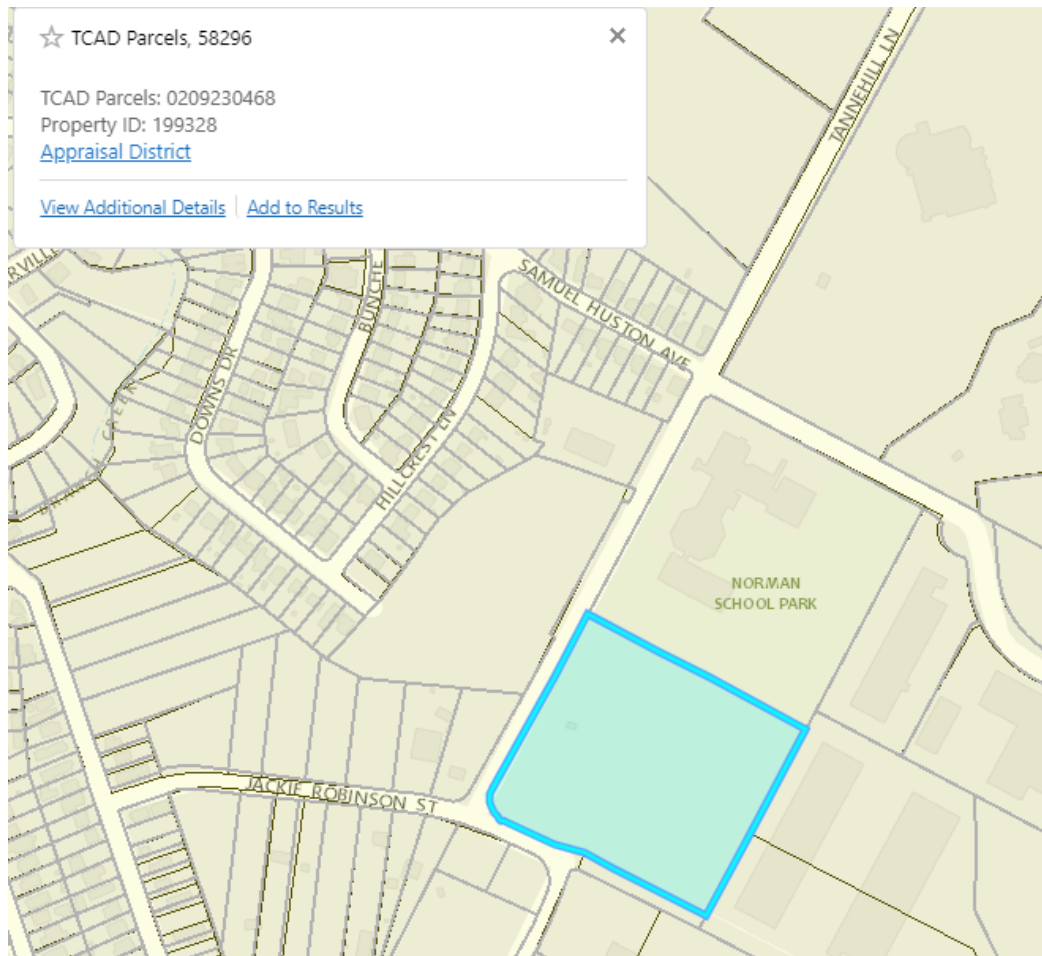
2018066161

RAMIREZA \$70.00

Dana DeBeauvoir, County Clerk

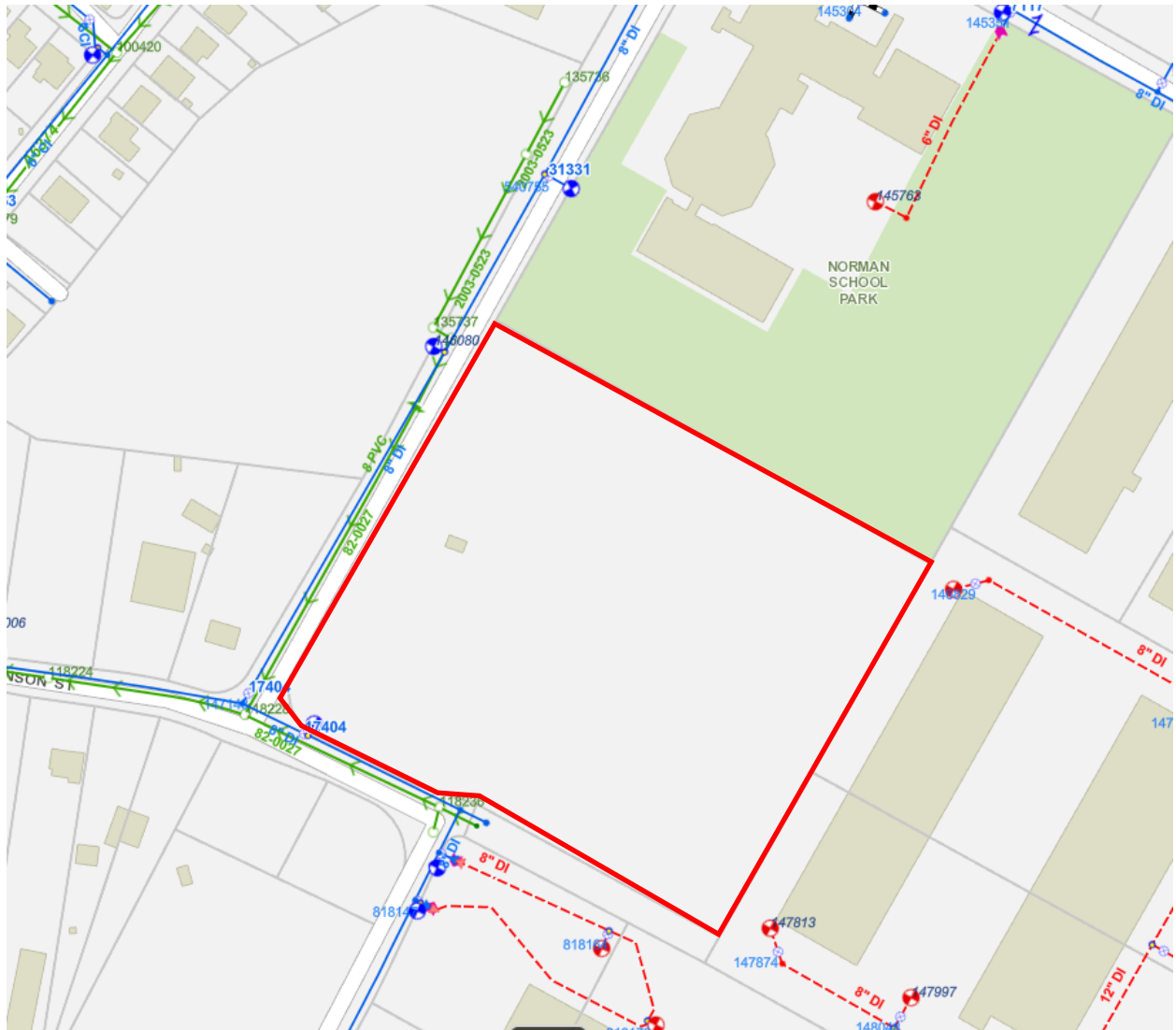
Travis County TEXAS

Travis County Appraisal District



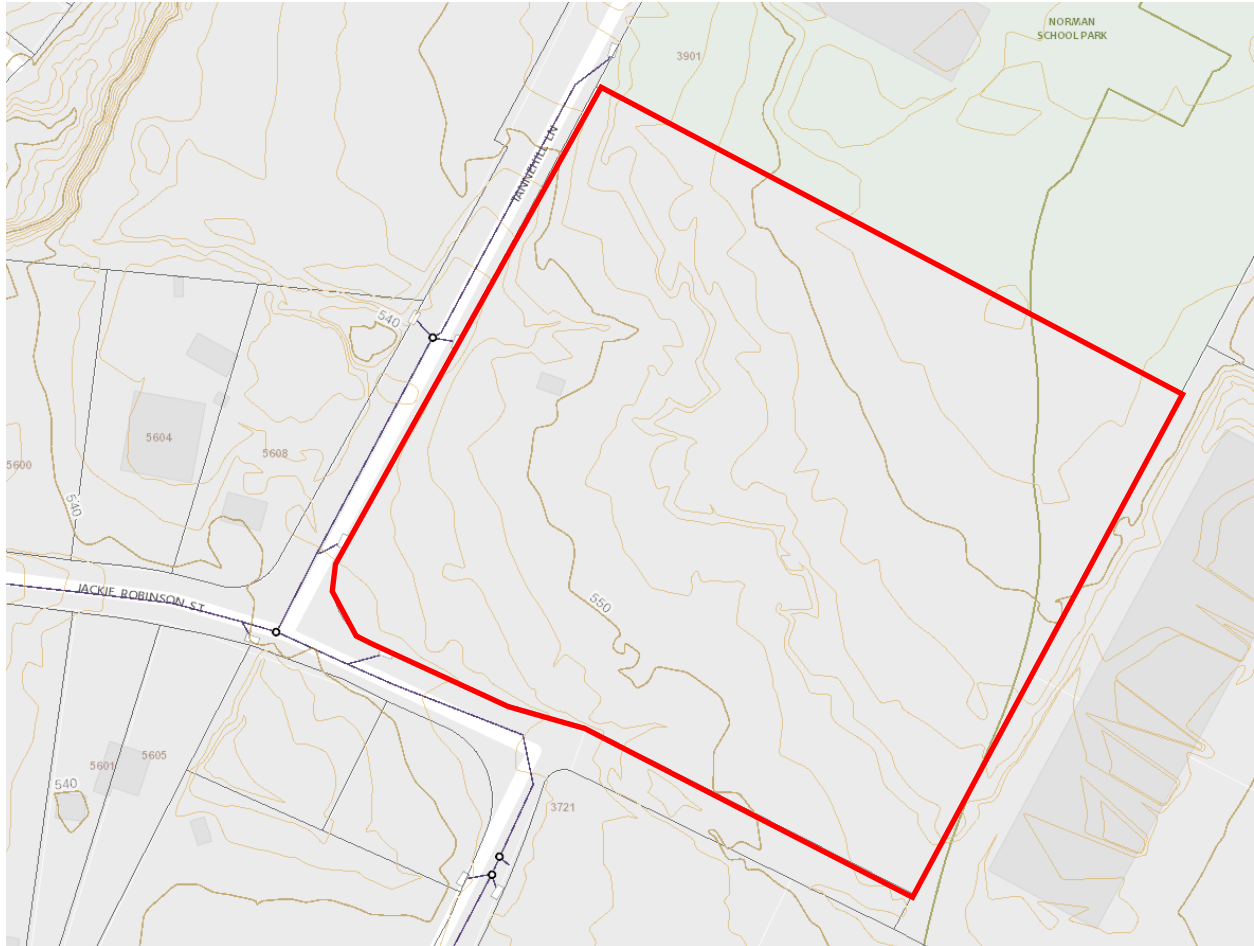
Property			
Account			
Property ID:	199328	Legal Description:	ABS 22 SUR 29 TANNEHILL J C ACR 8.922
Geographic ID:	0209230468	Zoning:	SF3
Type:	Real	Agent Code:	
Property Use Code:			
Property Use Description:			
Protest			
Protest Status:			
Informal Date:			
Formal Date:			
Location			
Address:	TANNEHILL LN TX 78723	Mapscot:	
Neighborhood:	FORMERLY EEXMP	Map ID:	021021
Neighborhood CD:	_EEXMP		
Owner			
Name:	AUSTIN HOUSING FINANCE CORPORATION	Owner ID:	180087
Mailing Address:	3000 S IH 35 STE 300 AUSTIN, TX 78704-6536	% Ownership:	100.0000000000%
		Exemptions:	EX-XV

AWU Water and Wastewater Utilities



- 8" DI waterline in Tannehill Lane and Jackie Robinson Street ROW.
- 8" PVC wastewater line in Tannehill Lane and Jackie Robinson Street ROW.

Topography and Storm Utility



- 18" RCP in Tannehill Lane and Jackie Robinson Street ROW.
- Topography between 563' and 543' MSL.

2.4 Development Milestones

Closing the project financing is the critical milestone date around which all pre-development activity is scheduled. Affordable housing production is only feasible if the Low Income Housing Tax Credit program is a component of project financing. The property is not competitive for 9% tax credits under the current TDHCA Qualified Action Plan; therefore, an application for the 4% tax credits will be submitted. Eligibility to use the 4% tax credit program is dependent upon securing a bond reservation from the Texas Bond Review Board for private activity bonds. Timing of the Tannehill Lane RFP review and developer selection precludes applying for private activity bonds in 2021 for which the Bond Review Board must have received the bond application by October 20, 2021. The AHFC is not scheduled to have selected the RFP proposal before November 2, 2021. A bond application must include evidence of site control through March 2022. Considering the extraordinary market demand for the housing private activity bond sub-ceiling, applying for a bond reservation after the November 5, 2021 bond lottery likely will not produce the requested reservation. With the over-subscription of available bond cap, only the bond lottery applicants and the bond applications submitted immediately after the bond lottery will receive a bond reservation in 2022. A bond application submitted after the RFP developer agreement has been executed has essentially no chance of receiving a 2022 bond reservation. Submitting a bond lottery application in October 2022 is, therefore, the most viable available option for receiving a bond reservation for this development.

Bond lottery applications are prioritized by the income eligibility restrictions placed upon the property, ranging from priority 1A to 3 with 1A being the highest priority. A priority 1A requires a housing development to offer 50% of the housing units to households having income at or below 50% AMI and 50% of the housing units to persons having income at or below 60% AMI. To meet the objectives of the RFP, particularly to generate housing for households having income not greater than 30% AMI, additional funding is needed for a financially feasible priority 1A development. The desire of Legacy Impact Housing not to seek gap financing from the AHFC eliminated this priority application from consideration.

The priority 1B lottery application requires applicants to offer 15% of the housing units to families at or below 30% AMI and 85% of housing units at or below 60% AMI. Meeting this income restriction is feasible without the need for gap financing; however, to meet

Legacy's goal of maximizing the AHFC economic benefit from the development, a priority 2 application produces greater revenue to AHFC and reduces the deferred developer fee payment period.

A priority 2 bond lottery application must offer 80% of the housing units to families earning not more than 60% AMI. The Legacy proposal serves families having income in the range of 30% to 70% and provides the greatest AHFC economic benefit. Should Legacy Impact Housing be selected as developer and if the AHFC agrees, a priority 1B bond application can be submitted to strengthen the chance of receiving a bond reservation in March 2023.

In the 2021 bond program year, 1-priority 1A, 1-priority 1B, and 3-priority 2 applications were submitted for the bond lottery in Region 7; the region within which Austin is located. Only the priority 1A application received a bond reservation in January 2021 as it used enough of the Region 7 available bond volume cap that the balance was insufficient to fund the next application, a priority 1B application. The priority 1B and 2 applicants were forced to wait for the March 1, 2021 bond collapse generating sufficient bond volume cap to receive reservations. This outcome was the basis for suggesting a priority 2 bond application for the Tannehill Lane site which also set the milestone event of projecting a bond reservation being granted to the development by April 1, 2023. No priority 3 bond applications received a bond reservation from the March 2021 bond fund collapse and are waiting for the August collapse for a chance to be awarded a reservation. The Tannehill Lane financing closing date must occur within 180 days of receiving the bond reservation. Assuming the bond reservation is given by April 1, 2023, the closing date would be not later than September 28, 2023.

The detailed project milestone schedule and FHA loan application schedule are presented on the following pages.



TANNEHILL LANE APARTMENTS
ESTIMATED SCHEDULE FOR PROCESSING & COSTS
PREPARED 07/30/2021

Contact: Carolyn Whatley
Mobile: (561) 758-3171
Email: carolyn.whatley@berkadia.com

DIRECT TO FIRM - IF APPROVED BY HUD & UNDERWRITING

ENGAGEMENT & CONCEPT MEETING ESTIMATES						
Task	Est. Time	Start	Completion	Est. Cost	Est. Expiration	Comment
Engage Lender	3 Days	01/01/23	01/04/23	\$5,000		Lender engagement occurs upon completion of loan analysis and commitment to proceed.
Concept Meeting	30 Days	01/04/23	02/03/23	\$0		Includes time for collecting exhibits, preparing/submitting concept package, holding meeting and receiving response from HUD. Market study if determined necessary for Concept is estimated between \$8k - \$10k.

NOTE: If one item is delayed, it may cause a domino affect on the balance of the timeline. Timing based on calendar days.

DIRECT TO FIRM - 4% Bond Transaction						
Task	Est. Time	Start	Completion	Est. Cost	Est. Expiration	Comment
Phase I ESA & 4128	35 Days	02/10/23	03/17/23	\$5,000	08/16/23	Need final site plan to avoid possible updates to Environmental. Conditions may require additional reports as each site is unique.
8 Step Process	0 Days			\$0		TBD - only required if flood plain or wetlands.
Historical				\$0		TBD by Phase I ESA
Demo, Asbestos, Lead				\$0		TBD by Phase I ESA
Market Study	35 Days	03/05/23	04/09/23	\$10,000	06/26/23	Requires final unit mix within a week of engagement or it could cause delays.
Architectural Review	60 Days	03/20/23	05/19/23	\$15,000		80-90% complete plans and specs are required to start the architectural review. This schedule assumes they will be ready 45 days from receipt of the Concept Meeting approval to proceed. Final costs will also be required in order to begin the cost review. The GC may be able to start cost review with 80% complete plans, but typically needs to review final plans to finalize. Plans should also be submitted to the municipality for approval as soon as possible as the reviewer likes to see at least the first round of comments to confirm no material changes are required. This schedule includes time for initial plan review, response from your architect and final plan review to be issued.
Cost Review	14	04/10/23	05/19/23	\$10,000		See above notes. Initial cost review can be completed in approx. 2 weeks; however, plans must be finalized before final cost review can be approved.
Appraisal - Full	35 Days	03/05/23	05/19/23	\$13,000	06/26/23	Requires final unit mix within a week of engagement or it could cause delays. Draft appraisal typically issued in 30-35 days, but report typically isn't finalized until cost review is complete.
Finalize 3rd Party Reports & Complete Underwriting	21 Days	05/19/23	06/09/23			NOTE: Just prior to submitting the Application, Lender will need to verify availability of the cash & escrows required for the loan.
Submit to HUD / Firm Commitment	75 Days	06/11/23	08/25/23	\$33,554		HUD Application Fee. \$3/\$1000 of Mortgage Amount. Non-refundable. FIRM COMMITMENT EXPECTED Assumes HUD expedites review. OZ 0.10%. NOTE: HUD's standard review time is 60 days, excluding an intake review completed prior to underwriter assignment. HUD is currently experiencing a queue for underwriter assignment. Please check back with us for current queue estimates, not in this schedule.
Good Faith Deposit	1	08/25/23	08/26/23	\$167,770		Due upon Commitment & at rate lock. Returned after closing, non-refundable if not closed.
Rate Locked	1	08/26/23	08/27/23			All critical items for all parties must be resolved prior to locking rate.
Bond Resolution Adopted						
Reprocess Final L/A Forms w/HUD	5	08/27/23	09/01/23			
1st Draw w/Support to Lender	-25		08/28/23			Call for invoices to be paid at Initial Endorsement
Closing Package Submitted to HUD	3	08/27/23	08/30/23			Title & Survey long lead items!
Bond Validation						
Post Bonds	7		09/02/23			Week before pricing bonds.
Confirm Closing Date w/HUD ("pencil in date")	10	08/27/23	09/06/23			This is not the closing date, just when HUD will tell us what day we will close. Subject to satisfaction of all requirements.
Price Bonds	3		09/09/23			Need HUD to confirm closing date prior to pricing.
Clear to Close by HUD Legal & Housing	21	08/30/23	09/20/23			Assumes HUD review of closing package complete in 3 weeks.
Bonds Pre Closing	1		09/21/23			
Pass Papers at HUD	1		09/22/23			
Close on Bonds	1 Days	09/22/23	09/23/23			Legal Retainer to start early - 15 days prior to receiving Commitment.
				\$254,324	Sub Total Funds Required For Application Process	
				\$259,324	Total Funds Required for Concept Meeting, Pre-Application & Application	
				\$167,770	Less Good Faith Deposit to be returned after closing.	
				\$91,554	Estimated Costs For Processing & Underwriting (Excluding Good Faith)	

APPLICATION MUST BE SUBMITTED BY: 06/26/23
ESTIMATED LOAN AMOUNT: \$ 33,554,000

Based only on these assumptions. May be submitted earlier if plans & costs completed earlier.

09/01/23 Deadline to Submit based on Concept Green Light 120 days.

NOTE 1: BORROWER MUST PROVIDE BUILDING PERMITS AT LEAST 1 WEEK PRIOR TO EXPECTED CLOSING DATE.

NOTE 2: ALL ABOVE COSTS ARE ESTIMATES AND ARE INCLUDED IN THE MORTGAGE WITH THE EXCEPTION OF THE GOOD FAITH DEPOSIT WHICH IS RETURNED UPON SETTLEMENT OF THE GINNIE MAE SECURITY. THE GOOD FAITH DEPOSIT NON-REFUNDABLE IF THE LOAN DOES NOT CLOSE FOR ANY REASON. THE OTHER EXPENSES MAY BE REIMBURSED FROM MORTGAGE PROCEEDS BUT ARE NON-REFUNDABLE IF THE LOAN DOES NOT CLOSE.

Legacy Impact Housing - 3811 Tannehill Lane Development Schedule

Key	
	- Austin HFC RFP and development incentive approval processes
	- City of Austin zoning and permitting steps
	- Private activity bond sequence
	- Tax credit application process
	- Architectural construction plan development & approval
	- Project construction & mortgage loans and tax credit equity
	- Project construction progress
<i>Critical path items</i>	

<u>Date</u>	<u>Activity</u>
5-Aug-21	RFP response due date
8-Sep-21	RFP Response scores released by AHFC
10-Sep-21	RFP's available for public review
4-Oct-21	AHFC Executive Team Recommended RFP announced
2-Nov-21	AHFC Board selects RFP Proposal. Start Development Agreement Negotiation
1-Feb-22	Execute Development Agreement
Feb-22	Submit Affordability Unlocked Application
Feb-22	Request SMART Housing designation/obtain certification letter
Feb-22	Zoning meeting with neighborhood org prior to submitting zoning application
Mar-22	Hold SMART Housing project applications pre-submittal meeting
Mar-22	Follow-up neighborhood zoning request meeting
Apr-22	Initiate zoning request & neighborhood plan amendment
Jun-22	Submit AHFC partnership and bond inducement application
Jul-22	Negotiate & finalize AHFC partnership MOU
Aug-22	AHFC Bond inducement
Aug-22	Request State Rep and City Council resolutions of support
Oct-22	Submit Priority 1b or 2 bond lottery application to TBRB
Oct-22	Zoning change approved by City Council
Oct-22	Start tax credit application preparation

Nov-22	Participate in bond lottery
Nov-22	Start site plan civil engineering
Nov-22	Start architectural design
Dec-22	Start subdivision civil engineering
Jan-23	Submit tax credit application
Jan-23	Start FHA 221d4 loan application process
Feb-23	Submit civil site plan to COA for review
Feb-23	Submit subdivision plat to City of Austin
Mar-23	<i>Start FHA construction plan and cost review</i>
Mar-23	Solicit tax credit equity letters of interest
01-Apr-23	<i>Receive bond reservation</i>
Apr-23	Submit architectural construction plans for building permits
May-23	Apply for construction loan
May-23	Tax credit application approved by TDHCA Bd
May-23	Start tax credit investor due diligence
Aug-23	Subdivision plat approved by City of Austin
Aug-23	Site plan approved by City of Austin
Aug-23	Building Permits issued by City of Austin
Aug-23	HUD sets FHA loan closing date
22-Sep-23	<i>Close bond & project financing</i>
Oct-23	Start development construction
Sep-24	Apartment occupancy begins
Oct-24	Home sales begin
Mar-25	Home sales completed
Apr-25	Apartment construction completed
Jul-25	Achieve apartment occupancy stabilization

2.5 Zoning District

A zoning and Future Land Use Map change application will be submitted to rezone the property from the current "P" zoning to "MF-2", multifamily residence low density zoning. Currently, the property uses along the east side of Webberville Road/Tannehill Lane south of MLK Boulevard are more intensive in character than single family residential zoning permits. In fact, the entire land area bounded by 183 on the east, Bluestein Drive/Wilcab Road on the south, Axel Lane/Tannehill Lane on the west, and MLK on the north has industrial park, religious, construction services, public schools, apartments, and social service agency land uses. This large segment of land offers the perfect transition from the intensive land uses expected to occur along 183 and the residential uses commencing west of Tannehill Lane. Consistent with sound neighborhood planning principles, the proposed MF-2 zoning complements the existing intensive to less intensive zoning and land uses occurring from US 183 westward. The precedent for multifamily zoning has been established by the Fort Branch apartment site located north of Samuel Huston Avenue and west of US 183.

The SMART Housing Greenfield Multifamily Density Bonus program will be utilized to allow the development to proceed under the MF-6 site development regulations to achieve the desired production of affordable housing.

The neighborhood request that this new development provide a local small-scale market, such as a "Mom & Pop" business or farmers' market, requires requesting that the small market footprint area be rezoned to "LR", local retail, or a similar district that will allow the use.

2.6 Development Plan Alignment with East MLK Combined Neighborhood Plan

The East MLK Combined Neighborhood Plan Future Land Use Map (FLUM) assumes the current “P”, public zoning, remains in effect. This assumed land use is understandable given the property was owned by the Austin Independent School District at the time the Neighborhood Plan was adopted. However, given the land was sold to the Austin Housing Finance Corporation for the intention of developing affordable housing, using the property for that purpose will necessitate seeking a Neighborhood Plan FLUM amendment along with rezoning the land to permit the AHFC’s intention to promote affordable housing development.

The East MLK Combined Neighborhood Plan contains future development goals established by the community. The Legacy Impact Housing Altitude East concept plan meets each of the Neighborhood Plan goals in the following manner.

East MLK Neighborhood Plan Contact Team Meeting Presentation

Neighborhood Questions

1. Which goals in the East MLK Combined Neighborhood Plan does this project satisfy?

- The Proposed project aims to cultivate a safe community embedded into the existing neighborhood that serves and provides a diverse range of housing and social opportunities. Our proposed site plan is organized to not only foster the existing social and economic diversity, but also seeks to cultivate it even further. To do this we sought to equally distribute housing types throughout the site and give all housing access to a communal landscape amenity.
- Surrounded by public academic institutions, trails, and residential neighborhoods, we are imagining our site as a key outreach to connect all of these differing community groups. We are also envisioning the site as a central outdoor amenity for the adjacent neighborhoods. This will encourage pedestrian and bicycle traffic not only through our site, but also throughout the adjacent existing neighborhoods to the new amenity.
- The communal landscape preserves and cultivates a large portion of the existing landscape and trees on the site. In addition, with the integration of rain gardens and public trails we are not only keeping the existing, but cultivating it further as an amenity for the community to utilize and appreciate.
- Please see the proposals response to each Neighborhood goal below, addressing each goal and how the proposal aims to prioritize the neighborhood's development plan:

NEIGHBORHOOD GOALS:

Goal One

- ***Preserve established residential areas and improve opportunities for home ownership by promoting the rehabilitation of existing housing and new, infill housing compatible with the existing style of this neighborhood.***
- **Response:** Development of the site will provide a meaningful land use transition from the Techni Center industrial park to the established and evolving residential neighborhood. The industrial park use intensity is stepped down through a multifamily building and further reduced through attached two and three-story residential structures. Proposed buildings nearest Tannehill Lane are for sale homes accessible to persons with income not exceeding 80% of the area median income, affordable housing.

Goal Two

- ***Promote a mix of land uses that respect and enhance the existing neighborhood and address compatibility between residential, commercial, and industrial uses.***
- **Response:** The proposed mixed use of the site with rental and for-sale dwellings provides a creative approach to buffering the existing neighborhood from the Techni Center industrial use while enhancing the neighborhood connectivity to the Norman Sims Elementary School. The innovative project land plan integrates single family and multifamily uses within the site through an organic internal layout rather than the traditional subdivision of lots. Vehicular access into the site is finely controlled rather than permitting excessive driveway cuts along the boundary streets.

Goal Three

- *Preserve existing small businesses and encourage new neighborhood-serving commercial services in appropriate locations.*
- **Response:** The highest and best use of this site is residential. Given the site is not located on a major arterial street, commercial land uses were not considered to be practical. However, the proposed future residential land use will provide small business opportunities for building and landscape maintenance as well as project construction. Another development request consideration expressed by the Hog Pen Neighborhood Association, the neighborhood within which the property is located, is allocating some site area to a future local market, such as a small “Mom and Pop” enterprise or a farmers’ market. Although large food stores are conveniently located for the neighborhood residents, a “lost” characteristic of the neighborhood is the loss of small, neighborhood friendly convenience shopping opportunities. An area adjacent to or within the ground floor of the apartment building nearest Jackie Robinson Street has been reserved for a specialized small market use. Parking for this market is available both on site and the new Jackie Robinson Street parallel parking.

Goal Four

- *Promote the development and enhancement of the neighborhood’s major corridors.*
- **Response:** Although Tannehill Lane is not considered a major corridor street it plays an important role in providing secondary access to commercial and residential areas as well as a back-up route for emergency responders. Enhancement of the Tannehill Lane street corridor will include addition of pedestrian sidewalks along the eastern side and working with Capital Metro to create shaded bus stop structures. Additional street right-of-way will be dedicated to extend Jackie Robinson eastward and sidewalks will be added along the northern side.

Goal Five

- *Provide housing that helps maintain the social and economic diversity of residents.*
- **Response:** This development will directly address the threat of gentrification within the neighborhood. One hundred percent of the living units created will be considered affordable housing and accessible to the current neighborhood residents as well as those that already left the neighborhood because of escalating property taxes. The rental apartments will offer apartment homes with rents affordable to persons earning from 30% of the area median income to 80% of the area median income, with more than 50% of the apartments priced for persons at or below 50% area median income and 72% of the apartments designed for family use with two and three bedrooms. Responding to the quickly escalating new home sale prices in the neighborhood, all homes for sale will not exceed the City of Austin Development Incentive Programs’ affordable prices ranging from \$211,400 for a one-bedroom home to \$285,000 for a three-bedroom home (or as adjusted by the City) making them affordable to persons with income not exceeding 80% area median; also making them eligible for City of Austin home buyer assistance programs such as down payment assistance.

Goal Six

- *Protect and enhance historic resources and structures and preserve the area’s historic and cultural character.*
- **Response:** Neighborhood residents have enjoyed the ropes course on the site and have appreciated the site for its natural environment character. The vegetated nature will be preserved through the strategic building placement away from significant trees, particularly the heritage trees. The existing tree cover is regarded as a site asset that must be respected by the development plan. The Legacy Impact Housing business philosophy of good land stewardship will extend beyond the boundaries of this residential site. A fund will be established for the E MLK Combined Neighborhood Planning Area’s use to repair or enhance the historic cemetery at the southwest corner of Jackie Robinson and Tannehill, the Norman-Sims recreational park, and the Greater Works Baptist Church walking trail area.

Goal Seven

- ***Create a transportation network that allows all residents to travel safely throughout the neighborhood by improving safety on major arterials and neighborhood streets.***
- **Response:** This development will improve Jackie Robinson by constructing an extension to the east in anticipation that it may be further extended in the future to Bluestein Drive. Neighborhood traffic safety will be promoted through limiting vehicular traffic into the new residential site to three controlled locations, two along Jackie Robinson and one along Tannehill Lane. Should the City of Austin require a traffic impact analysis, the results could include additional improvements to the site boundary streets.

Goal Eight

- ***Provide access to, from, and through the neighborhood for all residents by promoting a neighborhood-friendly system of transportation.***
- **Response:** A fundamental design consideration for the proposed site development is providing a physical connection between the new residences and the surrounding neighborhood. This is accomplished by inviting the neighborhood to travel into and through the site to promote safe travel to Norman Sims Elementary School as well as enjoyment of the preserved and improved natural setting within the site. Connecting the internal pedestrian travel paths to the surrounding properties will be new sidewalks installed along the east side of Tannehill Lane and north side of Jackie Robinson.

Goal Nine

- ***Improve bicycle and pedestrian traffic safety on neighborhood streets.***
- **Response:** The addition of sidewalks and bicycle lanes along Tannehill Lane and Jackie Robinson will improve both bicycle and pedestrian traffic safety and continue improving the neighborhood travel connectivity.

Goal Ten

- ***Address neighborhood security by reducing illegal and dangerous activities and improving the sense of public safety.***
- **Response:** Control over use of the development site will be greatly improved initially through the creation of residences with an interest in self-policing site use activities. Site lighting will ensure public safety by illuminating the interior pedestrian and parking spaces. The potential to conduct illegal activity under the cover of the current thick vegetative cover will be significantly reduced.

Goal Eleven

- ***Protect and enhance the neighborhood through code enforcement, property maintenance activities, and by reducing trash and dumping in the neighborhood.***
- **Response:** The potential for trash dumping on the site will be eliminated through development, the property will be maintained by a professional apartment management business and property owners' association, and the new residential structures will be designed and inspected in accordance to the City of Austin building code standards.

Goal Twelve

- ***Improve the quality, safety, and cleanliness of area creeks, and reduce the impact of flooding in the neighborhood.***
- **Response:** Development of property will be in compliance with the City of Austin watershed development detention and water quality regulations. Permitted rainfall runoff from the site will not be

greater than that occurring prior to development and will be controlled with rain gardens and detention/filtration basins.

Goal Thirteen

- ***Create more public open space, including parks and green spaces, improve existing parks and increase recreational amenities in the neighborhood.***
- **Response:** Meeting this goal has been a driving force in designing the development plan. Respecting that the natural environment has been revered and utilized by the neighborhood led to balancing the amount of site disturbance, vegetative preservation, and housing production. The area used for housing and parking is approximately 60% of the site, leaving the balance to craft a meaningful green space to share with the neighborhood. The limited but robust housing delivered along with the natural and improved accessible paths through the site are what set this development plan apart from other concepts.

2. Have you identified and established contact with the relevant Neighborhood Association? Which Neighborhood Association?

- The E. MLK combined Neighborhood Planning Group Contact Team has been contacted which in turn identified the Hog Pen Neighborhood Association as the area representative to receive information on the proposed affordable housing development. A development concept meeting with the Hog Pen Neighborhood Association was held on July 29th, 2021.
- It is our understanding that since an amendment to the plan's Future Land Use Map (FLUM) and rezoning will be required, we shall meet with the neighborhood plan contact team for a recommendation per city code.

3. Aside from the site plan, has any visualization for the project -- i.e., colored elevations, renderings, etc. -- been produced?

- A colored site plan has been produced to emphasize the communal landscape and the distribution of the sustainable lifestyle for the diverse housing and the connection to the surrounding neighborhood.

4. What is the expected number of vehicle trips per day for the project? Will a Traffic Impact Analysis or Neighborhood Traffic Analysis be required; if so, has one been executed?

- A traffic impact analysis will be required during the site plan stage if vehicular traffic exceeds 2,000 trips per day.

5. What construction type is intended, and what measures do you plan to take to ensure the resultant buildings are durable?

- The proposal assumes a 4-story wood framed construction type intended to provide the community a long-lasting and sustainable building with a minimum of a 1-star Austin Green Building rating.

6. What green building strategies and features are being planned for buildings and landscape?

- Austin Green Building (S.M.A.R.T. Housing Requirement)
- Our proposal distributes landscape amenities for the surrounding neighborhood and site residences and integrates and maintains the existing landscape and trees. Bike lanes and pedestrian friendly paths stitch the existing neighborhood, connecting to the buildings on the site and orienting the long direction of the buildings toward the North and South to provide ample lighting to provide equal access to parks and outdoor spaces to the community to promote a sustainable environment.
- Bike parking spaces and electric vehicle charging stations are planned to be integrated into the organization of the buildings and the landscape on the site, allowing for and promoting a sustainable lifestyle for the community not only within the proposed development but also for the surrounding existing neighborhood.

7. How are you taking advantage of existing trees and other landscape features?

- Existing heritage trees and landscape is proposed not only to be retained, but to become a feature for the development and surrounding neighborhoods. Organizing parking into a parking structure, and separating vehicular circulation on the site allows for the footprint of parking on site to be minimized to preserve the existing landscape and trees.

8. What steps are you taking to ensure flooding does not occur on adjacent properties? What about contamination and erosion of nearby creek banks?

- Site detention is proposed to be embedded into the common landscape amenity through a series of communal rain gardens as required. We have begun to work with Bowman Civil Engineers to study the need for and types of rain gardens to address the site water quality. We are locating the rain gardens throughout the site to take advantage of the natural grade as well as to create visual interest points within the communal landscape.

9. What measures are you taking to minimize light pollution and prevent light trespass at adjacent single-family residential properties?

- Minimizing the impact on the existing landscape and trees, and providing communal landscape and natural artery through the site and connecting to the surrounding landscape acts as a natural barrier to light pollution between the proposed housing and the existing single family neighborhood. In addition, the landscape will be lit to celebrate the landscape itself, with minimal full covered lights. The site strategy also moves the most intense portion of the project, the parking garage, furthest away from surrounding residences and schools. The parking will then be wrapped with units on 3 sides not facing the ally, to block light seepage from it.

10. How is the project compatible with the scale and character of the surrounding neighborhood?

- Situating higher density housing adjacent to surrounding higher density commercial and industrial zoning and dispersing lower density housing towards the surrounding lower density single family residential zones blends the proposed housing types into the existing neighborhood and respects the surrounding community.
- Our project proposes extending the existing fabric of the surrounding small scale residential and schools by organizing the site so that there is a stepped height transition that occurs over the entire width of the site. This is accomplished by organizing the smaller building masses and more specifically the 2 story structures across from the surround residences to match their scale. We then transition to 3 story structures and subsequently the 4 story building aligns itself across from and acts as a visually barrier for the adjacent warehouses.

11. What benefits, besides additional housing, will this project provide to the neighborhood and planning area?

- The purposed communal landscape within our proposed site plan aims to become an amenity for the neighborhood. With this site's historic use of a ropes course, we seek to revitalize this sites appreciation and use as an outdoor amenity for the entire community. Part of our proposed solution is to literally reach across adjacent roads as an outreach to the surrounding neighbors to enjoy the site, as well as, extending and continuing to activate the adjacent oaks and trails via pedestrian and bicycle traffic through our site.
- Our site strategy has been developed as a gesture to both include and extend the existing neighborhood fabric. With the stepped height, broken down massing similar to adjacent buildings and our reactivation of the site as an outdoor community amenity, we feel that we are both continuing and enhancing the character of the neighborhood.
- To further extend the public use of the communal landscape a local market is integrated into the footprint of the apartment homes at the ground level - serving as a public extension into the landscape and a programmatic opportunity for the neighborhood to activate and potentially operate.

2.7 Resident Support Services Program

Legacy Impact Housing believes in and appreciates the significance of providing meaningful resident supportive services to those persons and families desiring assistance, guidance, or encouragement. Portfolio Resident Services (PRS) has been selected as the organization to formulate and deliver a robust resident services program. PRS is serving over 300 apartment communities in eight states, touching the lives of 55,000 families and seniors.

The PRS approach to service program development is to conduct detailed quarterly resident surveys that illuminate the services desired by the residents and then tailor programs to those needs rather than simply offer a set menu services program. Each property has a unique service mix and delivery frequency. PRS will engage its community partners to design and deliver each service program with on-site PRS staff ensuring the delivery is performed to the expected standard to achieve meaningful results. A proposed services agreement and description of services that would be provided to the residents of Altitude East, and examples of other PRC clients, surveys, programs, and partners are presented on the following pages.



PORTFOLIO
RESIDENT SERVICES

RESIDENT SERVICES PROVIDER

- PURPOSE DRIVEN RESIDENT SERVICES AT AFFORDABLE AND CONVENTIONAL DEVELOPMENTS
- SERVING APPROX. 55,000 FAMILIES AND SENIORS AT OVER 300 APARTMENT COMMUNITIES
 - TEXAS, ARKANSAS, CALIFORNIA, COLORADO, KANSAS, MISSISSIPPI, NEW MEXICO, & VIRGINIA



July 31, 2021

Craig Alter, Managing Director
Legacy Impact Housing

RE: Resident Services Pricing Proposal: **New Development @ Tannehill Lane & Jackie Robinson ,Austin, Texas**

Dear Craig,

Thank you for the opportunity to provide our resident - supportive services program, the Good Neighbor Program, for your property containing **250** apartment residential units in **Austin, Texas**.

Portfolio Resident Services, Inc. is a 501C (3) non-profit corporation with its signature resident services program, the *Good Neighbor Program*, now the largest third party resident services provider in the country, serving over 300 communities in Texas, Arkansas, California, Colorado, Kansas, Mississippi, New Mexico, Virginia and Illinois.

We will make available to the residents of **Legacy Impact Housing Development** certain programs, including Educational Services, Family Skills, Personal Development, Health and Nutrition, Neighborhood Advancement and Civic Involvement, and Recreational Activities, which provide a platform for improving quality of life in your community. The community will enjoy **58** hours of resident supportive services per month. Portfolio Resident Services will compile and maintain documentation needed for agency reporting as appropriate.

In addition to the programs offered to residents via the *Good Neighbor Program*, Portfolio Resident Services also provides the following benefits to further enhance your community:

1. **Coaching** for property management on how to best relate to the benefits of the Program.
2. **Communication for Enhancing Resident Retention** to maintain and increase current occupancy.
3. **Marketing Materials** to assist with lease closing and awareness of the Program as an on-site amenity.

Please note the pricing provided below:

Program Fee using ACH (Invoices will be provided):

- One-time Start-Up Fee of **\$2,200.00** and
- Monthly Fees of **\$2,083.00**.

Monthly Program Fees without using ACH will be 5% additional.

Pricing will expire after 90 days.

SIGNATURE _____

DATE _____

Upon the receipt of this signed proposal, we shall prepare the Resident Services Agreement, including the pricing option elected above, for your signature. An electronic copy of this proposal may be scanned and emailed to my attention or mfrazier@prspurpose.org. We thank you for your consideration and look forward to serving you!

Sincerely,

Melinda Frazer



PORTFOLIO
RESIDENT SERVICES





PROPOSED SERVICE PLAN PARTNERSHIP

SAMPLES:

- Calendar
- Monthly Event Summary Report
- Flyers
- Enhanced Pulse Point sample
- E-survey

Good Neighbor Program – Jane Doe, Resident Services Coordinator. Please send questions or suggestions to: jdoe@prspurpose.org

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2 <u>Adult Development</u> Internet Skills Workshop 1:00 PM – 3:00 PM <u>Youth Development</u> Back to School Countdown Summer Bash 3:00 PM - 5:00 PM	3 <u>Health & Nutrition</u> Neighbors Sharing Recipes 1:00 PM – 3:00 PM <u>Youth Development</u> Popsicles and Crafts 3:00 PM - 5:00 PM	4 <u>Adult Development</u> English as a Second Language 1:00 PM – 3:00 PM <u>Youth Development</u> Discovery Channel Scavenger Hunt 3:00 PM - 5:00 PM	5 <u>Job & Career Development</u> Job Search Assistance 1:00 PM – 3:00 PM <u>Youth Development</u> Summer Reading Club 3:00 PM - 5:00 PM	6	7
8	9 <u>Social Services & Referrals</u> Helping Hands Pantry 1:00 PM – 3:00 PM <u>Youth Development</u> Board Games and Snacks 3:00 PM - 5:00 PM	10 <u>Job & Career Development</u> Working on Resumes 1:00 PM – 3:00 PM <u>Youth Development</u> Youth Sports and Competition 3:00 PM - 5:00 PM	11 <u>Health & Nutrition</u> Respiratory Care & Wellness 1:00 PM – 3:00 PM <u>Youth Development</u> Making Bracelets 3:00 PM - 5:00 PM	12 <u>Health & Nutrition</u> Covid Vaccine Registrations 1:00 PM – 3:00 PM <u>Recreational Activity</u> OPERATION BACK TO SCHOOL 3:00 PM - 5:00 PM	13 	14
15	16 <u>Adult Development</u> Financial Advising 1:00 PM – 3:00 PM <u>Youth Development</u> After School Program 3:00 PM - 5:00 PM	17 <u>Health & Nutrition</u> Dental Hygiene Workshop 1:00 PM – 3:00 PM <u>Youth Development</u> Anti-Bullying Club 3:00 PM - 5:00 PM	18 <u>Adult Development</u> English as a Second Language 1:00 PM – 3:00 PM <u>Youth Development</u> Reading Games 3:00 PM - 5:00 PM	19 <u>Family Development</u> Let's Get Cleaning 1:00 PM – 3:00 PM <u>Youth Development</u> After School Program 3:00 PM - 5:00 PM	20 	21
22	23 <u>Financial Literacy</u> Understanding Your Credit Score 1:00 PM – 3:00 PM <u>Youth Development</u> After School Program 3:00 PM - 5:00 PM	24 <u>Adult Development</u> English as a Second Language 1:00 PM – 3:00 PM <u>Youth Development</u> Board Games & Snacks 3:00 PM - 5:00 PM	25 <u>Program Coordination</u> Community Partner Outreach 1:00 PM – 3:00 PM <u>Youth Development</u> Help with FAFSA (Federal Student Aid) Applications 3:00 PM - 5:00 PM	26 <u>Social Services & Referrals</u> Rent/Utility Assistance 1:00 PM – 3:00 PM <u>Youth Development</u> After School Program 3:00 PM - 5:00 PM	27	28
29	30 <u>Neighborhood Development</u> Door to Door, Heart to Heart 1:00 PM – 3:00 PM <u>Youth Development</u> After School Program 3:00 PM - 5:00 PM	31 <u>Youth Development</u> Popsicles & Crafts 3:00 PM - 5:00 PM				

Don't Forget...All programs are FREE for residents. Sign up your family today!

Report Summary

Month & Year: June 2021**Portfolio Member:** Legacy Impact
Housing**Resident Services Coordinator:** Jane Doe**Occupancy Rate:** 99.00**New Residents Enrolled:****Total Activities:** 43**Total Hours:** 70.00**Total Male Participants:** 101**Total Female Participants:** 129**Total Participants:** 230**Total Youths:** 129**Total Adults:** 62**Total Seniors:** 34**Contribution Value:** \$2,621.89**GIK Goods/Donations:** \$1,991.89**GIK Services:** \$630.00**Total Volunteer Hours:** 26.00

GOOD NEIGHBOR PROGRAM

LEGACY IMPACT HOUSING

WHEN

(SEE CALENDAR FOR DETAILS)

WHERE

COMMUNITY
CENTER

ALL PROGRAMS ARE 100%

FREE TO RESIDENTS!!!

WWW.PRSPURPOSE.ORG



PORTFOLIO
RESIDENT SERVICES

PROGRAM OFFERINGS:

AFTER SCHOOL PROGRAM

- Tutoring
- Fun Science Experiments
- Healthy Snacks
- Good Grade Rewards

SOCIAL SERVICES

- Rent and Utility Assistance
- Prescription Payment Assistance
- Local Area Opportunities
- Food Pantry

COMMUNITY ACTIVITIES

- Spirit of Giving
- Operation Back to School
- National Night Out

SOCIAL EVENTS

- Holiday Parties
- Seasonal Celebrations
- Arts & Crafts

AND SO MUCH MORE!!



PORTFOLIO
RESIDENT SERVICES

The Good Neighbor Program Presents:

Let's Get Cleaning

Discover the Value of Good Housekeeping
Thurs. Aug. 19 1 pm



Protecting our Health | Boosting our Self-Esteem and Reducing Stress | Making Home a More Welcoming Environment



Sponsored by the Good Neighbor Program
Jane Doe, Resident Services Coordinator



Enhanced Pulse Point: House Cleaning 101

Audience: Adults, Seniors

This document in its entirety is proprietary material belonging to Portfolio Resident Services. Please do not make copies for distribution. You have limited permission to share in part for the following reasons: 1.) Editing the promotional flyer and distributing it, 2.) Printing the Summary page to place in your compliance binder as back-up documentation, and 3.) Copying the Activity section and related handouts for use during the session, if applicable. All other material and usage is “for your eyes only.”

Purpose

After attending this activity, participants will recognize the value of maintaining a clean and organized living environment.

Goals

1. Discuss the environmental, health, and safety benefits of house cleaning and organization.
2. Explore the expectations of management and lease requirements.
3. Recognize the value of money saved by taking proper care of home and contents.
4. Evaluate how to reduce individual and family stress and increase a more positive attitude through a clean and organized home.

Preparation

1. Print copies of the Resident Questionnaires for all participants to monitor outcomes.
2. Pre-watch the video and be prepared to lead a discussion. Don't feel you can only ask those provided. You may use some or all, as well as supplement your discussion. Follow your instincts as well as the lead of your residents.
3. Print copies of the Routine Cleaning Checklist and any other handouts you wish to include.
4. Ask your manager for a blank sample of a tenant lease. Highlight sections that might refer to cleanliness and be prepared to share this in your discussion and/or invite them to attend and review topics relating to it on the lease.
5. Optional: Purchase a few dollar store cleaning items for door prizes, game winners, etc. such as buckets, brushes, cleaning products, detergent, sponges, etc.

By providing some fun and informative activities, this session may help your residents build positive habits that result in an improved quality of living and improved tenant/management relations. Remember, this session is intentionally designed to present BASIC help for those who may not have learned proper cleaning techniques or need a motivating refresher. You can follow up with other activities such as Green and Thrifty Cleaning Tips, etc. but keep this one as a simple primer.

Household chores may never be fun, but we can make it a more pleasant experience by learning steps to be cleaner and better organized. Your local extension office is a great resource to enlist a community partner to speak to your residents about maintaining a clean home. If you prefer to present the material yourself, we have included several resources but suggest you download the Basic Home Maintenance Leader's Guide available from Kansas State Southwind Extension Service available at: http://www.southwind.k-state.edu/home-family/home/docs/Basic_Home_Maintenance.pdf. Be sure to review it and print only the pages you wish to present and distribute. You may also use an alternative resource to supplement.

Event Instructions

***Ensure every participant has completed the “before” portion of the Resident Questionnaire.**



Introduce this session with a conversation about housecleaning. Who likes to clean? How often do you clean – ongoing, weekly, or whenever you can get to it. Let's face it, none of us really love to clean house but it is an absolute necessity! Not only is it necessary for our environmental health, but poor house cleaning habits can result in lease violations or even an eviction notice. There are several keep values to good housekeeping:

- Saves money. When you take care of the things you have, you are less likely to have to replace them.
- Improves health and safety. Breathing fresh air with less dust is better for your respiratory system. The chances of tripping over clutter or spills is less likely when there's a higher attention to organization and cleanliness. Cleaning and disinfecting reduces germs that can make you sick. Many fires start because of paper clutter, improper storage of cleaning chemicals, lint from clogged dryer vents, and grease from improperly maintained stoves.
- Affects you and your family's attitude. A clean house can enhance self-esteem and encourage family members to take pride in their home. A messy house can raise your stress levels and reduce your socialization if you're less likely to invite company over. A clean house produces a calmer, more positive attitude, and creates a more pleasant atmosphere for everyone.

Stress that management focuses on issues that may become safety hazards, cause pest control problems in yours or adjoining apartments, and/or violate lease agreements. (If you've brought a sample lease, read aloud and discuss items on it that pertain to household maintenance and housekeeping.)

Play Clip 1: "Clean as a Team." (Pause at "Getting Motivated")

Discussion: Ask the group some or all the following questions as you see fit. Allow time for good discussion!

1. Do different members of your household have different ideas of what's clean?
2. Does everyone pitch in to help?
3. Do you feel like the condition/cleanliness of your home affects your attitude? How?
4. Do you agree that a clean home can enhance positive feelings like a sense of accomplishment and pride?

Play Clip 2: "Getting Motivated" (Pause at "Cleaning Tips")

Discussion:

1. What kinds of things do you need to "jump start" your motivation to clean? (programs like today, hearing from others, company coming, deadlines, etc.)
2. What can you do to inspire other members of your household to pitch in?

Play Clip 3: "Cleaning Tips"

Discussion:

1. How would it make you feel to know your children or other members of your household are embarrassed by the condition of your home? Do you feel it's important to care how they feel?
2. What can you do to lessen anxiety (yours and others) about your home?

Application

Present the materials as outlined in the Basic Home Maintenance Leader's Guide or from your own resources.

Wrap up with these tips:

It's not cheating to take shortcuts! Staying on top of your cleaning on an ongoing basis will make it less burdensome. Pick up clutter every day. Make laundry day easier by washing a load or two every day. Learn to multi-task such as folding clothes while watching tv or dust a room while you're talking on the phone.

Delegate and motivate your kids. Don't just bark, "Clean your room!" It's helpful to understand what chores are age-appropriate for your child(ren). Pitch in and work as a team with younger children. Give everyone specific directions and break cleaning down into specific tasks. Use the cleaning checklist to assign chores. Turn cleaning into a "beat the clock" game. Offer incentives for a shared family event (not bribes, wink). The results will be less frustration on your part, a clean house everyone can enjoy, and some well-deserved family time.

Make it a regular occurrence to invite people into your home. Most of us are more motivated when we know someone is coming over, even if it's just a child's playmate. Don't isolate yourself because your home is messy. It doesn't always have to be perfect but building better housekeeping habits can reduce your stress. And raising your standards a bit may make you more open to socialization with friends, family, and neighbors.

Activity: What am I?

Play a quick game.

Call out a hint from a commonly used household product and allow players a few seconds to guess the name. (Optional: Award a small prize to the participant who guesses the most.)

- This spray promises to clean and shine. (Pledge Dusting Spray)
- He flexes his muscles and things get clean. (Mr. Clean)
- Named after a body in the solar system, this green and red can sprinkles on. (Comet)
- The three numbers of its name add up to 13. (409)
- The name of this product is also the international Morse code distress signal. (S. O. S.)
- The logo for this product includes a body part and a construction tool. (Arm and Hammer)
- This product brings you happiness when the sink is empty. (Joy Dishwashing Soap)
- This product doesn't roll high and low at the beach, but it will get your clothes clean. (Tide)
- This name rhymes with "lick a can." (Spic and Span)
- Don't yell at me but this product gets the stains out. (Shout)

Follow through with Surveys

Have participants complete the "After EPP" sections of the Resident Questionnaire at the end of your program. Within 48 hours after the session, email completed questionnaires and the corresponding sign-in sheet for this program to: epps-surveys@portfolioresidentservices.org. This is an important part of your Enhanced Pulse Points participation so that we can effectively track and measure outcomes.

House Cleaning 101

Purpose

After attending this activity, participants will recognize the value of maintaining a clean and organized living environment.

Summary

During this session participants:

1. Discuss the environmental, health, and safety benefits of house cleaning and organization.
2. Explore the expectations of management and lease requirements.
3. Recognize the value of money saved by taking proper care of home and contents.
4. Evaluate how to reduce individual and family stress and increase a more positive attitude through a clean and organized home.



PORTFOLIO
RESIDENT SERVICES

LURA Met:	Date and Time:
Guest Speaker (Optional):	
Agency Name (if applicable)	

This page may be included in your compliance binders as back-up documentation, along with agency handouts, brochures, business cards, etc.

Routine Cleaning Checklist



Use this list to delegate tasks and/or check as you go for a great sense of accomplishment!

KITCHEN:

- ☐ Empty dishwasher
- ☐ Load dishwasher
- ☐ Wash, dry, and put away pots and pans
- ☐ Clean and disinfect sink and countertop
- ☐ Clean stove top
- ☐ Wipe down freezer/refrigerator
- ☐ Sweep and mop floor
- ☐ Take out trash/recycling

DINING ROOM:

- ☐ Remove clutter from table
- ☐ Change out table cloth or placemats
- ☐ Wipe down surfaces
- ☐ Dust and polish furniture
- ☐ Vacuum cloth seats
- ☐ Sweep, mop, or vacuum floor

LIVING ROOM:

- ☐ Remove household clutter, tidy
- ☐ Wipe down surfaces
- ☐ Dust and polish furniture
- ☐ Straighten pillows and cushions
- ☐ Fold throw blankets (wash if needed)
- ☐ Sweep/mop floor or vacuum

ENTRY WAY AND HALLS:

- ☐ Remove clutter
- ☐ Wipe down walls and surfaces
- ☐ Dust and polish furniture

BEDROOM:

- ☐ Put away clutter
- ☐ Change bed sheets
- ☐ Sort and put away laundry, bring dirty clothes to utility room
- ☐ Wipe down surfaces
- ☐ Dust and polish furniture
- ☐ Vacuum

Bathroom:

- ☐ Wash and dry throw rugs

- ☐ Remove clutter
- ☐ Spray/clean mirror
- ☐ Clean and disinfect sink and countertop
- ☐ Clean and disinfect bathtub and shower
- ☐ Clean and disinfect toilet
- ☐ Sweep and mop floor
- ☐ Empty trash

LAUNDRY/UTILITY ROOM:

- ☐ Clean lint filter on dryer
- ☐ Sort dirty laundry by loads
- ☐ Wash and dry
- ☐ Fold clothes and put away
- ☐ Hang up clothes as you go
- ☐ Iron as needed
- ☐ Tidy laundry and cleaning supplies
- ☐ Empty trash
- ☐ Sweep and mop floor

FINAL CLEANING LIST:

- ☐ Walk through and check for burned out lightbulbs, replace as needed
- ☐ Check all areas for miscellaneous items and put away
- ☐ Return items to their proper place
- ☐ Don't forget to replace the air conditioning filters once a month unless management does it for you
- ☐ Walk through your home and spray your favorite scent
- ☐ ENJOY THE SWEET AROMA OF YOUR CLEAN HOME!





First Name: _____ Apt. # _____ Property: _____

Resident Questionnaire

Which age group do you belong to? ☐ 12-18 ☐ 18-55 ☐ 55+ What is your gender? ☐ Male ☐ Female

How long have you lived at this property? ☐ Less than 1 year ☐ 1-2 years ☐ 2+ years

How many people live in your apartment unit? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5+

EPP NAME: _____ DATE: _____

Before EPP

1. On a scale of 1-10, how knowledgeable are you of the topic? (10=Very knowledgeable)	
2. Are you aware of resources for the topic?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3. Would you like information on the topic?	<input type="checkbox"/> YES <input type="checkbox"/> NO
4. Are you the only member of your household present for the presentation?	<input type="checkbox"/> YES <input type="checkbox"/> NO
5. Is the topic relevant to you?	<input type="checkbox"/> YES <input type="checkbox"/> NO
6. Is the topic a family topic of discussion?	<input type="checkbox"/> YES <input type="checkbox"/> NO
7. Is this topic a priority to you and your family?	<input type="checkbox"/> YES <input type="checkbox"/> NO
8. On a scale of 1-10 do you look forward to learning about the topic? (10-Highest)	
9. Do you feel education on the topic will enhance your life skills?	<input type="checkbox"/> YES <input type="checkbox"/> NO
10. Do you feel comfortable discussing the topic in a group setting?	<input type="checkbox"/> YES <input type="checkbox"/> NO

After EPP

1. On a scale of 1-10, how knowledgeable do you now feel on the topic? (10=Very knowledgeable)	
2. Are you now more aware of resources for the topic?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3. Did you receive information on the topic?	<input type="checkbox"/> YES <input type="checkbox"/> NO
4. In the future, will you refer someone from your household to attend this presentation?	<input type="checkbox"/> YES <input type="checkbox"/> NO
5. Do you now feel the topic is relevant to you?	<input type="checkbox"/> YES <input type="checkbox"/> NO
6. Will you be discussing the topic with your family?	<input type="checkbox"/> YES <input type="checkbox"/> NO
7. Is this topic now a priority to you and your family?	<input type="checkbox"/> YES <input type="checkbox"/> NO
8. On a scale of 1-10 how much did you learn about the topic? 9. (10-Learned a great deal)	
10. Did the education provided on the topic enhance your life skills?	<input type="checkbox"/> YES <input type="checkbox"/> NO
11. Do you now feel comfortable discussing the topic in a group setting?	<input type="checkbox"/> YES <input type="checkbox"/> NO

Your comments/stories are welcome

*Thank you for taking the time to fill out our questionnaire.
We rely on your feedback to help us improve our services.*

Legacy Impact Housing Survey QR Code



<https://www.surveymonkey.com/r/LegacyImpactHousing>

Legacy Impact Housing

Confidential Resident Survey - Encuesta Confidencial Para Residentes

* 1. English or Spanish

☐

English

☐

Español

Legacy Impact Housing

THE GOOD NEIGHBOR PROGRAM IS COMING TO YOUR NEIGHBORHOOD! The GNP is provided free of charge to the residents of your apartment community. Activities may include the following and more!

- after school programs - recreational and social activities
- GED training - health and nutrition events
- ESL classes - job training

Let us know what kind of free events you and your family are interested in by completing this survey.

* 2. Resident Information

Name(s)

Apartment #

Email Address

Phone Number

* 3. I would like to see the programs offered during:

☐

Morning

☐

Afternoon

☐

Evening

☐

Weekday

☐

Weekend

4. I would be interested in attending one or more of these programs or activities:

- ☐ Bingo/Games
- ☐ Computer Class
- ☐ Continuing Education
- ☐ Crafts Class
- ☐ ESL for Adults
- ☐ Exercise Class
- ☐ Financial Planning/Budgeting/Credit
- ☐ Health/Fitness
- ☐ Job & Career Assistance
- ☐ Nutrition/Cooking
- ☐ Volunteering

5. I would like information/resources about these types of programs:

- ☐ Child Support
- ☐ Crime/Gang Prevention
- ☐ Dental Treatment
- ☐ Drug/Alcohol Treatment
- ☐ Family Counseling
- ☐ Family Violence Counseling
- ☐ Financial Assistance
- ☐ Immunizations
- ☐ Medical Facilities
- ☐ Women's Health




PORTFOLIO

RESIDENT SERVICES



CURRENT RESIDENT SERVICES

IN THE AUSTIN, TEXAS AREA

A vertical bar on the left side of the page with a gradient from dark grey at the top to yellow at the bottom.

ELEANOR “ELLIE” M.C. FANNING, EXECUTIVE DIRECTOR
MELINDA FRAZER, SR. DIRECTOR OF BUSINESS DEVELOPMENT
JOT COUCH, FINANCIAL CONSULTANT

LISA HESS, SR. DIRECTOR OF ADMINISTRATION
NICOLE TOSCANO, DIRECTOR OF COMMUNITY SERVICES
TX, AR, CA, CO, KS, NM

KENDRELL WASHINGTON, DIRECTOR OF COMMUNITY SERVICES
TX, MS, VA

DELOREN MAIER, DIRECTOR OF COMPLIANCE

ASSOCIATE DIRECTORS, REGIONAL COORDINATORS, AND RESIDENT SERVICES
COORDINATORS FOR OVERSIGHT OF EACH REGION AND SITE

OPERATIONAL STAFF

COVID-19 FOOD ASSISTANCE VIDEO

[HTTPS://WWW.YOUTUBE.COM/WATCH?V=1LFUGT0KK9K](https://www.youtube.com/watch?v=1LFUGT0KK9K)

Sample of Services-Family Properties

**All programming is customized to resident & management feedback*

Adult Development

Basic Adult Education
GNP Women's Group
Credit Counseling
ESL Classes
Financial Planning Assistance
Legal Assistance
Home Buyer Education
Abuse Awareness
Counseling & Crisis Support
Identity Theft & Fraud Prevention
Self Defense Education
Financial Literacy

Family Development

Self Esteem Enhancement
Character & Leadership
Child Development
College Prep Course
Computer Literacy
Personal Growth
Parenting Classes

Health & Nutrition

Nutrition Education
Prevention Education
Cooking Basics
Fitness Class
Health Fair
Health Screening
Immunizations
Fitness Class

Job & Career Development

Entrepreneurial Education
Vocational Training
Vocational Guidance
Job Referrals
Job Preparation Skills

Neighborhood Development

National Night Out
Resident Council
Crime Watch Meeting
Cultural Enrichment
Fire Safety
Gardens & Green Project
Stranger Danger Education

Recreational Activities

Arts & Crafts
Games
Team Sports
Social Events
Seasonal Activities

Social Services & Referrals

Resource Library
Counseling Services

Youth Development

Character Building
Scholastic Tutoring
After School Program
Operation Back to School



PORTFOLIO
RESIDENT SERVICES



PORTFOLIO

RESIDENT SERVICES

AUSTIN REGIONAL TEAM

BELINDA GARZA
BGARZA@PRSPURPOSE.ORG

ASSOCIATE DIRECTOR, RESIDENT SERVICES

JASON OUELLETTE
JOUELLETTE@PRSPURPOSE.ORG

REGIONAL COORDINATOR

LESLY REYNAGA
LRSANDOVAL@PRSPURPOSE.ORG

REGIONAL COORDINATOR

OLGA YRACHETA
OYRACHETA@PRSPURPOSE.ORG

COORDINATOR MENTOR

MELINDA FRAZER
MFRAZER@PRSPURPOSE.ORG

SR DIRECTOR BUSINESS DEVELOPMENT

TOTAL ADDED DONATIONS VALUE

(JAN 2021 – JUN 2021)

\$342,507.58

RENT & UTILITY ASSISTANCE

(2020 – JUN 2021)

\$253,163

AUSTIN AREA SITES

18 months or less

ARIA GRAND APARTMENTS
BRIDGE AT CAMERON
COMMONS AT GOODNIGHT
ELYSIUM GRAND
HARRIS BRANCH APARTMENTS
HARRIS BRANCH SENIORS
KAIA POINTE
LA MADRID
POINTE AT BEN WHITE
RUNNYMEDE APARTMENTS
VILLAGES AT BEN WHITE
VILLAGES AT FISKVILLE
WESTERN SPRINGS

More than 2 years

ALLEGRE POINT
ASBURY PLACE
FRANKLIN PARK
LUCERO APARTMENTS
PARK PLACE AT LOYOLA
SANTORA VILLAS
SOUTHPARK RANCH APARTMENTS
STONERIDGE APARTMENTS
TROVE EASTSIDE
WALNUT CREEK APARTMENTS
WINDY RIDGE
WOODWAY VILLAGE

AUSTIN AREA COMMUNITY PARTNERS

ABC Center
Almonie Pediatrics
Aspen Hospice
Austin Community College
Austin Mutual Aid
Austin PD
BB&T
Blue Cross / Blue Shield
Book Boosters
Buzgova, Meneses & Wellington Smith LLP
Catholic Charities
Cheddar's
Chi'lantros
Christian Warrior Church
CJB Management
Cooks Nook
Daughter of Zion
El Buen Samaritano
Flaming Sword
Girling Home Health
Half Price Books
Home Health Services
Humana Insurance
IKEA
Lowe's Pro
Manos de Cristo
McDonald's
Montessori of Lake Hills
Opportunities for Williamson & Burnet Counties
Pajamas for Kids
Pool Pro
Randalls Grocery Store
Sacred Heart
San Marcos PD
Share a Fork Foundation
St Vincent de Paul
Starbucks
Stitch Humanity
Taco Cabana
Texas Farm Bureau
Texas Health and Human Services
Texas Prepares
The Beat Church
The Hill
Travis County
United Health Care
Vax Now
Walmart
Welcome Table
Whittlesey Landscaping
Wonder World
ZDTs Amusement Park

Access Dental
Apache Shores
AT&T
Austin Firefighter Association
Austin PAL Program
Austin RENT Assistance
Black Women In Business
Blue Santa
Boys and Girls Country
Caring Place
Central Texas Food Bank
Chic-fil-a
Christ Community Church
Circle of Hope
Connected Senior Care
CTFB
Domino's Pizza
Farmers Insurance
Fresh Food Pantry
Good Shepherd on the Hill
HEB
HOPE
IDEA Schools
La Madrid
Manor Estates
Masako Sweet Bakery
Meals on Wheels
Operation Turkey
OWBC
Pizza Hut
Project Pajamas
RISE
SAFE Austin
Save the Food
St Matthews Episcopal Church
St. James
State of Texas
Superior Health
Tarrytown Pharmacy
Texas Food Bank
Texas Kitchen
Texas Rent Relief
The Caring Place
Toys for Tots
Travis Heights Christian Outreach
Usupplies
Vella Insurance
Way of Life Church
Whim Party Rentals
Women's Center
Workers Assistance Program




PORTFOLIO
RESIDENT SERVICES

SAMPLES OF CURRENT SERVICES IN AUSTIN

- Calendar
- Monthly Event Summary Report
- LURA Summary
- Survey Results

Good Neighbor Program -Lesly Reynaga Sandoval, Resident Services Coordinator Please send questions or suggestions to: lrsandoval@prspurpose.org

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5	6	7	8	9	10
		<u>Social Services & Referrals</u> Rent & Utility Assistance 12:00 PM - 1:00 PM <u>Basic Adult Education*</u> Writing: Grammar Focus 1:00 PM - 3:00 PM <u>Recreational Activity</u> Making Summer Cards 3:00 PM - 5:00 PM	<u>Financial Planning Assistance or Course*</u> Learning Credit Scores 12:00 PM - 1:00 PM <u>English as a Second Language*</u> Conversation Group 1:00 PM - 3:00 PM <u>Scholastic Tutoring*</u> Summer Reading and Free Books 3:00 PM - 5:00 PM	<u>Welfare Programs*</u> SNAP Applications 12:00 PM - 1:00 PM <u>Health Screening Service*</u> Eye Exams 1:00 PM - 3:00 PM <u>Social Event*</u> Summer Smoothie Party 3:00 PM - 5:00 PM		
11	12	13	14	15	16	17
		<u>Community Garden*</u> Gardening Schedule 12:00 PM - 1:00 PM <u>Home Buyer Education*</u> Buying a Home with Truist 1:00 PM - 3:00 PM <u>Youth Program*</u> Board Games and Snack 3:00 PM - 6:00 PM	<u>Transportation*</u> Cap Metro & COVID 12:00 PM - 1:00 PM <u>GED Preparation*</u> Social Studies Focus 1:00 PM - 3:00 PM <u>Recreational Activity</u> Arts & Crafts 3:00 PM - 5:00 PM			
18	19	20	21	22	23	24
		<u>Social Services & Referrals</u> Rent & Utility Assistance 12:00 PM - 2:00 PM <u>Vocational Training*</u> Goodwill Excell Center 2:00 PM - 3:00 PM <u>Organized Team Sport*</u> Kids ZUMBA! 3:00 PM - 6:00 PM	<u>Counseling Service*</u> Austin Center for Grief & Loss 12:00 PM - 1:00 PM <u>Credit Counseling*</u> Track Your Credit Score 1:00 PM - 3:00 PM <u>Recreational Activity</u> Arts & Crafts 3:00 PM - 5:00 PM	<u>Program Coordination</u> Community Outreach Food Pantry 12:00 PM - 2:00 PM <u>Legal Assistance*</u> Volunteer Legal Services 2:00 PM - 3:00 PM <u>Recreational Activity</u> Slime and Snacks 3:00 PM - 6:00 PM		
25	26	27	28	29	30	31
		<u>Health and Nutritional Course*</u> Learning Balanced Meals 12:00 PM - 1:00 PM <u>State Workforce Development*</u> Work In Texas 1:00 PM - 3:00 PM <u>Recreational Activity</u> Slime and Snacks 3:00 PM - 6:00 PM		<u>Program Coordination</u> Community Outreach: Door to Door, Heart to Heart 12:00 PM - 2:00 PM <u>Recreational Activity</u> Slime and Snacks 2:00 PM - 5:00 PM		

Don't Forget... All programs are FREE to residents! Sign Up Today!

Report Summary

				Month & Year:	May 2021
Portfolio Member:	Franklin Park				
Resident Services Coordinator:	Sandra Fernandez	Total Male Participants:	47	Contribution Value:	\$35,499.54
Occupancy Rate:	89.57	Total Female Participants:	81	GIK Goods/Donations:	\$35,394.54
New Residents Enrolled:	0	Total Participants:	128	GIK Services:	\$105.00
Total Activities:	30	Total Youths:	110	Total Volunteer Hours:	7.00
Total Hours:	58.00	Total Adults:	13	Rent & Utility Contributions:	\$34,848.28
		Total Seniors:	5		

LURA Summary

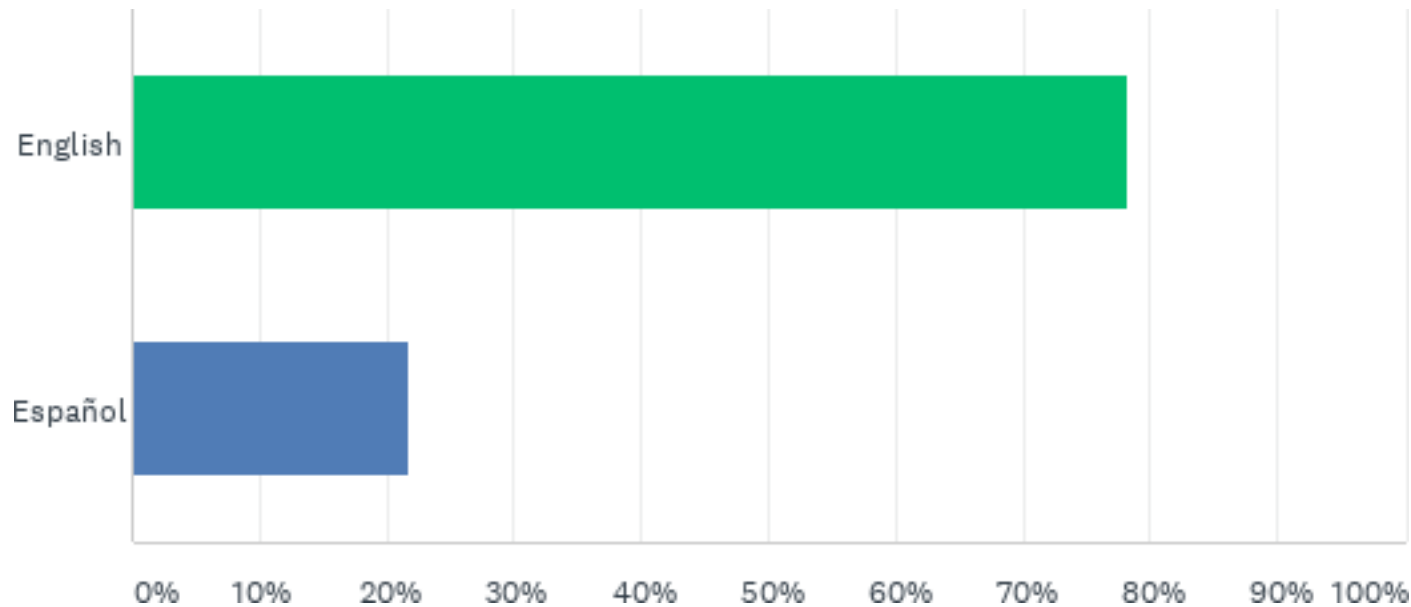
Kaia Pointe

Lura	Activity	Event Description	Date
Arts & Crafts - Twice monthly arts, crafts and other recreational activities such as Book Clubs and creative writing classes (2 points)			
	Arts & Crafts*	Silly Sidewalks	7/8/2021
	Arts & Crafts*	Pinwheels	7/15/2021
Food Pantry - Food pantry consisting of an assortment of non-perishable food items and common household items (i.e laundry detergent, toiletries, etc.) accessible to residents at least on a monthly basis or request by a tenant (1 point)			
	Food Pantry*		7/22/2021
Health & Nutritional Course - Quarterly health and nutritional courses (1 point)			
	Health & Nutritional Course*	Water Exercise	7/8/2021
Health Fair - Annual health fair provided by a health care professional (1 point)			
	Health Fair*	Free Health Resources	7/8/2021
Income Tax Preparation - Annual income tax preparation (offered by a qualified individual from an income tax prep service or IRS-certified Volunteer Income Tax Assistance program) (1 point)			
	Income Tax Preparation*		7/1/2021
Quarterly financial planning courses (i.e. homebuyer education, credit counseling, investing advice, retirement plans, etc.) Courses must be offered through an on-site instructor; a CD or online courses is not acceptable (1 point)			
	Financial Planning Course*	Creating a Budget	7/1/2021
Weekday character building (shall include at least on a monthly basis a curriculum-based character building presentation on relevant topics (i.e. teen dating violence, drug prevention, teambuilding, internet dangers, stranger danger, etc.) (2 points)			
	Character Building*	Cyber Safety	7/15/2021
Youth Program - Organized youth programs or other recreational activities such as games, movies, or crafts offered by the Development (1 point)			
	Youth Program*	Veggie Picnic	7/22/2021

Harris Branch Apartments

Friday, June 04, 2021

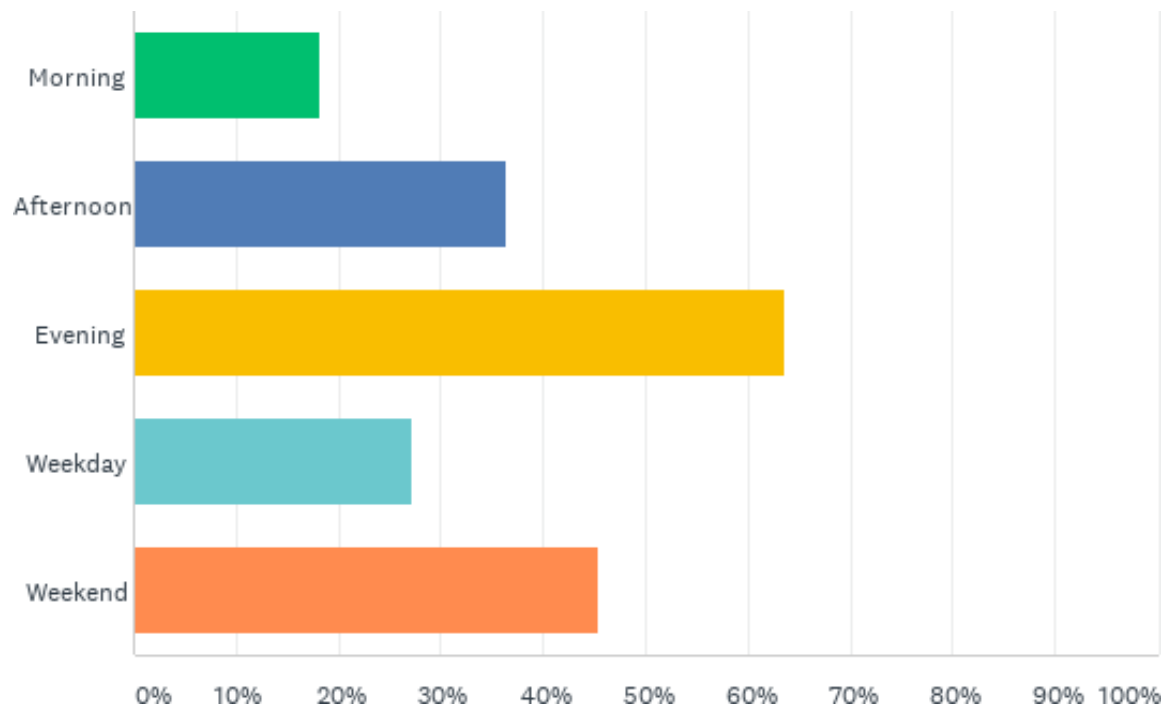
Q1: English or Spanish



Q1: English or Spanish

ANSWER CHOICES	RESPONSES
English	78.26%
Español	21.74%

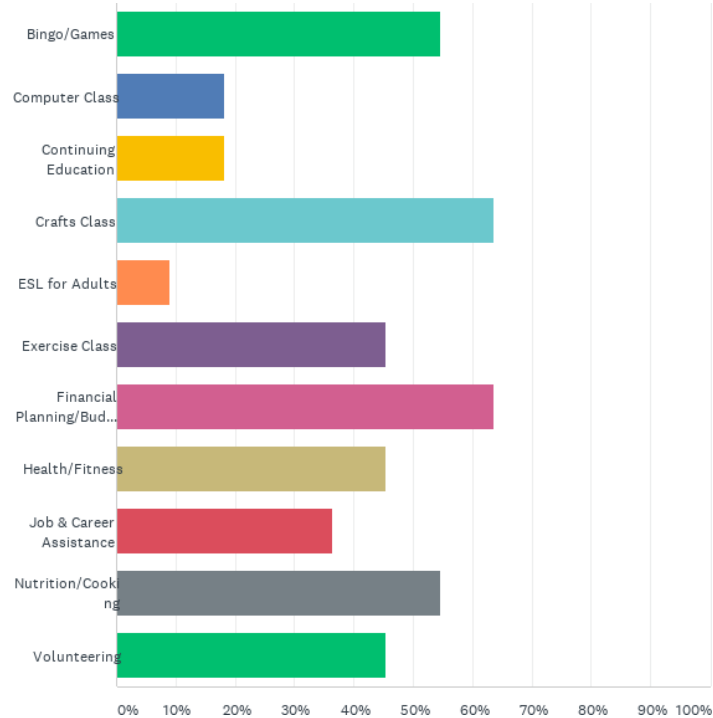
Q3: I would like to see the programs offered during:



Q3: I would like to see the programs offered during:

ANSWER CHOICES	RESPONSES
Morning	18.18%
Afternoon	36.36%
Evening	63.64%
Weekday	27.27%
Weekend	45.45%

Q4: I would be interested in attending one or more of these programs or activities:



Q4: I would be interested in attending one or more of these programs or activities:

ANSWER CHOICES	RESPONSES
Bingo/Games	54.55%
Computer Class	18.18%
Continuing Education	18.18%
Crafts Class	63.64%
ESL for Adults	9.09%
Exercise Class	45.45%
Financial Planning/Budgeting/Credit	63.64%
Health/Fitness	45.45%
Job & Career Assistance	36.36%
Nutrition/Cooking	54.55%
Volunteering	45.45%



PORTFOLIO
RESIDENT SERVICES

SUCCESS STORIES

Portfolio Resident Services

www.PRSpurpose.org



Good Neighbor Program Success Story

Community: Asbury Place

Date: May 2021

Resident Services Coordinator: Miranda Hanson



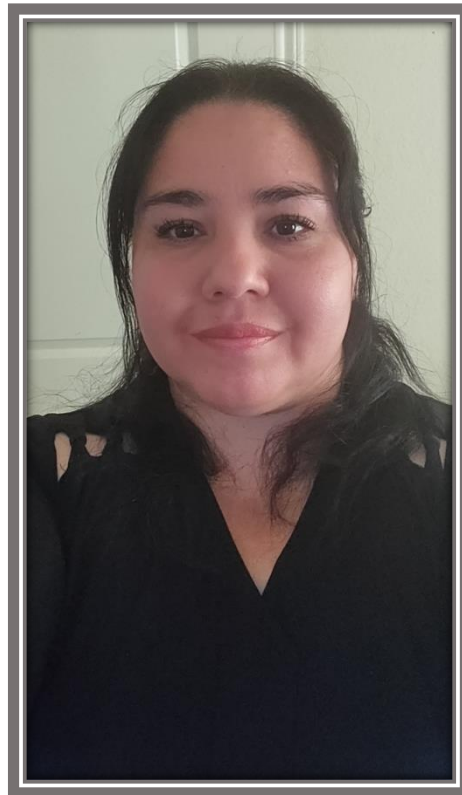
NARRATIVE:

In May, we were happy to learn that six residents at Asbury Place have been approved for a total of \$35,000 in rent assistance! PRS has provided residents information on rental assistance through the Texas Rent Relief Program since the program kicked off earlier in the spring. This program provides assistance to people who have lost income due to COVID-19. Emergency funds are available to help renters pay rent and utility bills, including past due rent and utilities.



Community: Santora Villas
Resident Services Coordinator: Lesly Reynaga

Date: April, 2021



NARRATIVE:

Sonia has been going through a rough time for the last year since the COVID pandemic started. After working in the food and service industry for years, she suddenly found herself without a job and unable to pay rent. We have applied for multiple rent assistance programs, and we are happy to share that Texas Rent Relief is covering 3 months of rent for her! This comes out to over \$3,800 in rent assistance. We are hopeful that other program will be able to help cover her remaining balance.



Community: Trove Eastside
Resident Services Coordinator: Oriana Lopez

Date: April, 2021



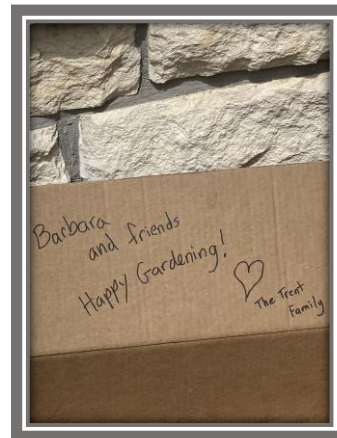
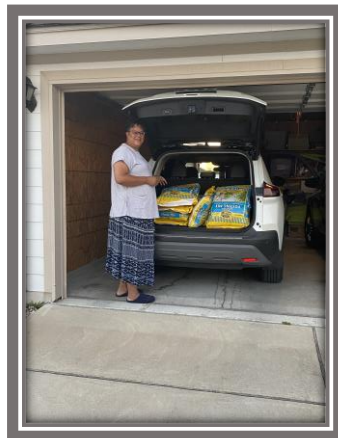
NARRATIVE:

The Spring Cleaning Event at Trove Eastside was a success! We had almost 50 residents come out and enjoy the event even in the rain! Community partners Blue Cross Blue Shield, Superior Healthcare, the Hill Episcopal Church, and UT's VaxNow program all came out to volunteer for the evening! The point of the event was for residents to bring items they no longer used or needed and sell/give/trade them there. We had two residents bring a lot of food, toys, and clothes. Many residents just came to enjoy the food and music and to shop around. We got 23 people vaccinated with the Pfizer Vaccine! They will be coming back on May 25th to administer the second dose.



Community: Villages at Fiskville
Resident Services Coordinator: Barbara Fletcher

Date: March, 2021



NARRATIVE:

It all began with the idea of creating a Garden Club for the residents. Shortly after, I posted on the neighborhood Nextdoor app asking for recommendations of how to get raised planter boxes for my residents. Suggestions on how to build them, where to get wood, and offers for building soon followed. Then Darrell and Jennifer offered to donate 3 built by Alistair! Soil was donated by Stephanie, and seedlings were donated by the Trent family! Residents enjoyed getting some sun while planting and we'll meet weekly to make sure the weeds don't take over and everything is watered. We look forward to our harvest!



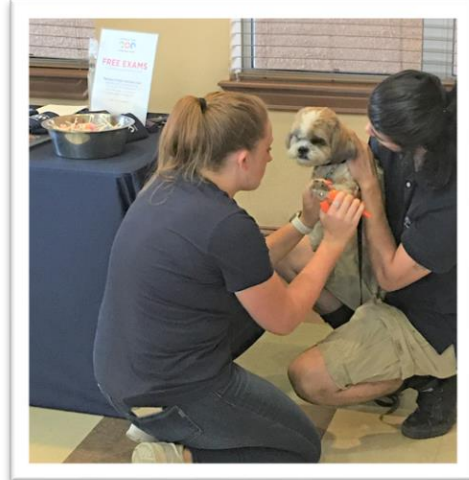
Community: Commons at Goodnight
Resident Services Coordinator: Jacquelyn Andrews

Date: May, 2021



NARRATIVE:

The youth program at Goodnight Commons continued going strong during the month of May. The younger kids love coming out to their activity center to make slime and other crafts activities, while the teenagers really enjoy a game of pool and an occasional board game. Our very sweet volunteer mom, Laura, is also a great asset to the Good Neighbor Program and we are grateful for her time!



“The Good Neighbor Program” Success Story

COMMUNITY NAME: Southpark Ranch

RESIDENT SERVICES COORDINATOR: Diane Sabrio

DATE(S) OF EVENT: June 2021

NARRATIVE:

The Good Neighbor Program at Southpark Ranch partnered with Manchaca Village Veterinary to host our first Yappy Hour! Residents were able to bring their dogs in for free nail clips, information, support and gifts for the care of their pets. With the donation of time, care, goodies, and love from MVV, all participants truly enjoyed the Yappy Hour.



Bios

Eleanor “Ellie” M.C. Fanning, Executive Director

Ellie M.C. Fanning is a dynamic leader and passionate advocate for affordable housing across the country as Executive Director of Portfolio Resident Services (PRS). PRS is now the largest, self-sustaining, 3rd party non-profit Resident Services Provider in the nation.

She got her start on the leasing & property management side of affordable housing at Texas-Inter-Faith Corporation in 2008 and by the next year earned the role of an Assistant Director with PRS. She worked on property for two years and in January of 2011 became a Resident Director overseeing the implementation and acquisition of the “Cascade/Pinnacle Southwest Housing Portfolio” consisting of 45 properties across Texas. Five years later, in 2016, she became the Managing Director of the entire company. Consisting of 275+ properties.

After a decade in the industry, she currently oversees 55,000+ units of affordable multi-family & senior housing contracts and ensures compliance in all the states they serve. PRS supports rent burdened individuals of all ages and demographic backgrounds.

Ellie's reliable reputation is founded upon an unwavering commitment to improving the lives of our residents via “The Good Neighbor Program.” She encourages everyone to contemplate how the ideal neighbor would interact and become more intentional about building community in their day-to-day communications by acting accordingly.

She rallies around those eager to assist low income individuals secure sustainable housing. She is grateful to lead such a diverse team with global impact.

Her passion is to provide premier customer service, and her extensive client list validates that. Her use of a progressive business model combined with a positive and persistent attitude towards ROI - pays off.

The daily quote she tries to live by is best stated by Martin Luther King, “Life’s most persistent and urgent question is, ‘What are you doing for others?’”

She is involved in the industry as a TAAHP Board member, and serves on the QAP and Scholarship Committee, is a member of the ULI Leadership team, a TACDC roundtable member, a member of TREC, TAA, NAA, and active in NH&RA, NCSHA, AHF Live & HAG in Washington, D.C.

Melinda Frazer, Sr. Director of Business Development

Melinda joined Portfolio Resident Services (PRS) in 2010 and she currently serves as Sr Director of Business Development. In her role, she oversees client recruitment and overall business strategies.

Melinda has had the privilege of leading several key initiatives, including the creation of PRS’s first branding/marketing video entitled “What if...” and PRS University, a web-based training platform.

Because of Melinda's expertise in supportive service compliance and program implementation in various states, she has had the privilege to speak on several occasions, including The Austin Alliance for Economic Inclusion, The Mississippi Affordable Housing Conference and at TALHFA's Annual Conferences.

As a Texas Association of Local Housing Finance Authorities (TALHFA) Board Member, Melinda represents TALHFA by currently serving on the Legislative Committee. In addition, she is a member of the Housing Advisory Group, Washington DC (HAG) and has the privilege to serve on the Scholarship Committee for TAAHP.

Being a part of the PRS Family gives Melinda the opportunity to bring hope to families, ROI solutions to owners and community building to property management.

Melinda attended the University of Oklahoma and in her spare time she enjoys Big XII and SEC sports, primarily because her sons attend Oklahoma University and Ole Miss respectively.

JOT Couch, Financial Consultant

JOT Couch is an expert in the extraordinary field of affordable housing in the United States. In this field, he has been a full-time consultant, developer and leader as a non-profit Executive Director for over 25 years. Based on his extensive national real estate experience he was recruited to lead Texas's longest standing affordable housing non-profit organization. It was formed over 50 years ago by volunteers from the Catholic, Protestant and Jewish faiths. They had rallied together to help very low-income individuals get into sustainable housing. They found a commonality and great unity in supporting disadvantaged individuals of all faiths.

Advancing these core beliefs, he became from time to time the Executive Director of several non-profit corporations who today share space and administrative staff "The Inter-Faith GROUP". Each has a separate and distinct board of directors. They are: Portfolio Resident Services, Inc., Texas Inter-Faith Housing Corp. (TIFH), Texas Inter-Faith Management Corp. (TIFM), Brompton Community Housing Development Corp. (BCHDC), Oaklake Community Housing Development Corp. (OCHDC), New Mexico Inter-Faith Community Housing Development Corp. (NMIFCHDO) and Today's Resident Services (TRS). Of these seven Corporations, five are Affordable Housing providers, one is a Resident Services provider, and one provides specialized research into the supportive resident services area on a national basis.

After obtaining his MBA, Mr. Couch was hired by Ernst & Ernst (Ernst & Young) as a Management Consultant. His responsibilities included the design and implementation of management information systems, conducting feasibility studies on supply and demand for hospitals and urgent care facilities, appraisal review, and energy efficiency analysis.

Within five years, Mr. Couch began an independent consulting practice focused on practical business improvements and growth strategies for organizations which enable workers of the small to medium size businesses. His primary client base included title companies, networking companies and real estate companies. As a result of his consulting work, improving the lives of others and housing became his passion.

Mr. Couch became an independent real estate developer and created the National Land Development Company, which was headquartered in Texas with a satellite office in Ohio. He worked throughout the

United States approving site selection and conducting pre-development due diligence for apartment communities, with an emphasis on re-zoning. His general responsibilities included packaging Planning and Zoning applications, working with local neighborhood committees and individuals to obtain their approval while coordinating the architectural and engineering plans along with conducting environmental research of all proposed sites. This work would culminate in final neighborhood and developer agreements and County and City plan approvals. Mr. Couch and his team handled the acquisitions and sales of over 5,000 apartment units, hotels, and office buildings, all of which created jobs and provided opportunities for individuals.

The meeting of Mr. Couch and the Board of Texas Inter-Faith was fortuitous. The affordable housing non-profit, TIFH (then Houston Inter-Faith), realized it must increase its fledgling portfolio of 392 apartment units or possibly decline. Mr. Couch took the challenge and today there are several major non-profit entities providing great things for affordable housing. His responsibilities include compliance, management, acquisitions, construction/development, strategic developments and grants.

One of those, with the help of the TIFH board, Mr. Couch developed a thought leading endeavor, "The Good Neighbor Program". This would provide high quality resident services at affordable multi-family properties in Texas for a reasonable cost to the apartment owner, and for no cost to the residents. Ideas like this are changing the field of affordable housing, and have become a successful acclaimed work, verified through testimonies, third party publications and most importantly by word of mouth referrals. The organization, Portfolio Resident Services, serves an affordable housing population estimated to be in excess of 60,000 low-moderate income individuals within 250 communities. This endeavor is the largest, and fastest growing, third-party resident service provider in the nation.

Mr. Couch has served on several well-known affordable housing Boards, including the Texas Affiliation of Affordable Housing Providers (TAAHP). TAAHP is the leading organization of affordable housing professionals in the State of Texas representing the affordable housing industry. TAAHP is dedicated to working for laws, policies, regulations and programs that are vital for the development of quality affordable housing for all Texans. Mr. Couch was President of TAAHP in 2001 with the primary desire to establish and define Board seat representation and duties for TAAHP for the years to come. Therefore, TAAHP's Board has seats for non-profit developers and managers, service providers, demographers, lenders, syndicators, and for-profit developers and managers allowing a stimulating discussion and providing a forum for the various beliefs, desires and constraints to produce Texas' enormously underserved need in affordable housing. This structure would result in truly representing all the stakeholders in Texas, benefiting the affordable housing residents themselves.

Mr. Couch contributes ideas and insights as a round-table member of the Texas Association of Community Development Corporations. The Texas Association of Community Development corporations (TACDC) is a non-profit statewide membership association of Community Development Corporations (CDCs) and related non-profit, government, and for-profit entities engaged in producing affordable housing and community economic development. TACDC improves the lives of low and moderate income Texans by strengthening the capacity of community development organizations as well as generating resources and relationships that enhance and sustain the community development industry in Texas. TACDC is dedicated to increasing the supply and quality of affordable housing for Texans with limited income and special needs. The organization advocates for a supportive environment at the local, state,

and federal levels on behalf of those that create and preserve homes, jobs, small businesses and other community endeavors.

Mr. Couch is a Board Member of the National Housing & Rehabilitation Association. NH&RA is an association of experts in real estate development, particularly affordable housing, historic rehabilitation and New Markets Tax Credit transactions. It is a challenging, knowledge-intensive, and relationship-driven organization. It requires up-to-the-minute knowledge and collaboration with top-level professionals.

Mr. Couch is a member of the Institute of Real Estate Management, a CPM, and the National Association of Realtors, a Real estate Broker. Mr. Couch earned his MBA from Bowling Green State University in Corporate Strategy and Finance and a earned his BBA in Engineering from the University of Texas. He served our country as an officer in the United States Army during the Vietnam and Cold War era.

ADDITIONAL PRS TEAM MEMBERS

- Lisa Hess, Sr. Director of Administration
- Kendrell Washington, Community Services Director – TX, MS, & VA
- Nicole Toscano, Community Services Director – TX, AR, CO, KS & NM
- Deloren Maier, Director of Compliance
- Yolanda Pickney, Compliance Specialist
- Carole Cox, Taskforce Lead Representative and Training & Staff Development Specialist
- Associate Directors, Regional Coordinators, and Resident Services Coordinators for oversight of each region and site
- Operational Staff

CLIENTS

Accolade Property Management	Alden Torch
Alliant Strategic	Allied-Orion Real Estate Services
Alpha Barnes Real Estate Services	Avenue5 Residential
Capstone Real Estate Services	Celtic Property Management
Cirrus Asset Management	Dallas Housing Authority
Delphi Affordable Housing	Dominium
Elmington Property Management	Eureka Multi-Family Group
Fairfield Residential	Gardner Capital
Good Harbor Management	Greystone Property Management
Hettig/Kahn	HFI Investments
Housing Trust Santa Fe	LDG Development
LEDG	Legacy Community Development
Lincoln Property Company	Lloyd Jones, LLC
Midway Companies	Mission DG
New Mexico Inter-faith Housing	NRP Group
Olive Tree Holdings – The Life Properties	Orion Property
Peak Capital	Pinnacle Properties
Quest Asset Management	Realtex
Related Management	San Antonio Housing Assoc.
San Antonio Alternative Housing Corp	Sandalwood Management
Sphinx Development	Spirit Property Management, LP
Stellar Group	Sun Chase American Management
Tablerock Capital	Texas Inter-Faith
TWG Development	United Apartment Group
Versa Development	Wilhoit Properties



PORTFOLIO
RESIDENT SERVICES



COVID-19 FOOD ASSISTANCE VIDEO

[HTTPS://WWW.YOUTUBE.COM/WATCH?V=1LFUGT0KK9K](https://www.youtube.com/watch?v=1LFUGT0KK9K)



Community: Park Place at Loyola
Resident Services Coordinator: Somkene Oduche

Date: August, 2020



NARRATIVE:

With the start of classes right around the corner, we wanted to make sure that our students had all the supplies they need for the first day of school. What a day it was! On Thursday, August 13, we held our annual Back to School event. We made a few changes to ensure that we were following social distancing guidelines and staying safe. There were plenty of air hugs to be had. Residents were able to drop-by the front office and point out the supplies they wanted. Once residents selected everything they needed, they were handed their bag of supplies. From pencil and paper to glue sticks and binders, there were a variety of supplies to choose from to make sure everyone's needs were met. We also held a raffle for a few cool backpacks to some lucky winners. The raffle winners had their prizes delivered straight to their doors. We are so glad that we were able to help our residents get what they needed to make this difficult time a little easier for our residents. We want to give a great, big thanks to Costco for their donation, which allowed us to purchase more school supplies for our amazing residents.



PORTFOLIO
RESIDENT SERVICES

CUSTOMIZING RESIDENT SERVICES

- QUARTERLY RESIDENT SURVEYS
- ASSESSMENT OF DATA (SURVEYS, MONTHLY EVENT SUMMARIES, REGION DIRECTOR REPORTS, INTERNAL AUDITS)
- COMMUNITY ENGAGEMENT
- PROPERTY MANAGEMENT FEEDBACK



Good Neighbor Program™ Confidential Resident Survey

Dear Resident:

We know this is a time of uncertainty and anxiety for our residents. We're committed to doing our part to keep you safe by modifying our usual programs. We're meeting needs one-on-one as opposed to groups, scheduling calls, and going door-to-door by request.

We also know that many of our residents are suffering from job losses, furloughs and reduced hours. Limited travel may mean a shortage of household necessities, food, and medications. Fortunately, there is help available. Please let us know your greatest needs during this time by checking boxes that apply to your household. We will reach out with resource information and supplies.

After completing this form, place it outside your door and we'll pick it up on _____ (the next day we're scheduled to be here). If possible, secure it with tape or place it under the corner of your door mat.

Your Name: _____ Apt. #: _____ Phone #: _____

☐ Food or Household Necessities. Explain: _____

☐ Food Assistance Programs such as S.N.A.P. or Food Bank Distributions

☐ Food Delivery Programs in our community

☐ Prescription Assistance

☐ Prescription Delivery Programs

☐ Utility Assistance Programs and Information

☐ Rent or Emergency Financial Assistance Programs

☐ Describe other needs: _____

Does your household have access to technology such as: (Please answer yes or no.)

Smart Phone? _____ Computer/Laptop? _____ Internet/Wifi? _____



Our thoughts and well wishes are with you during this difficult time.
We're committed to doing whatever we can to help!

Your Resident Services Coordinator



Name(s): _____ Apt.# _____

Phone# _____ Email: _____

Confidential Resident Survey

The Good Neighbor Program is provided free of charge to the residents of your apartment community. In order for us to better address the needs of this community, we ask that you to complete this survey and return it to your Resident Services Coordinator no later than _____, 202_.

Please check the program(s) you or your family would enjoy participating in.

1. I would be interested in attending one or more of these programs or activities.

<input type="checkbox"/> Computer class	<input type="checkbox"/> Volunteering
<input type="checkbox"/> Adult ESL	<input type="checkbox"/> Arts & Crafts
<input type="checkbox"/> Games (Dominoes, Cards, etc. ...)	<input type="checkbox"/> Reading Group
<input type="checkbox"/> Continuing Education	<input type="checkbox"/> Exercise Class
<input type="checkbox"/> Bingo	<input type="checkbox"/> Health Classes/Presentations/Screenings
<input type="checkbox"/> Job & Career Assistance	<input type="checkbox"/> Nutrition/Cooking
<input type="checkbox"/> Financial Planning/Budgeting/Credit	<input type="checkbox"/> Women's Group
<input type="checkbox"/> Potlucks/Community Events	

2. I would like information/resources about these types of programs.

<input type="checkbox"/> Medical facilities	<input type="checkbox"/> Family counseling
<input type="checkbox"/> Crime prevention	<input type="checkbox"/> Dental treatment
<input type="checkbox"/> Immunizations	<input type="checkbox"/> Eye Treatment
<input type="checkbox"/> Drug/Alcohol Treatment	<input type="checkbox"/> Women's Health
<input type="checkbox"/> Men's Health	<input type="checkbox"/> Financial Assistance

3. If you would like to see any programs not listed please add them here:

1. _____ 2. _____
3. _____ 4. _____

4. I am interested in program offered:

☐ Morning ☐ Afternoon ☐ Evening ☐ Weekday ☐ Weekend

*Thank you for taking the time to complete this survey.
Services are based on availability and the discretion of the
Resident Services Coordinator.*

Confidential Resident Survey

The Good Neighbor Program is a Supportive Service Provider that has been provided free of charge to the residents of _____Community. In order for us to better address the needs of this community, we ask that you complete this survey and return it to your Activity Coordinator no later than _____.

El Programa del Buen Vecino es un proveedor de servicios de apoyo que se proporciona de forma gratuita a los residentes de los departamentos_____. Para poder atender mejor las necesidades de esta comunidad, le pedimos que complete esta encuesta y la devuelva a su coordinador de actividades a más tardar el _____.

Please check the program(s) you or your family would enjoy participating in ----- Por favor indique los programas en los que usted o su familia gustaria participar

1. I would like my child to attend one or more of these program activities. / . Quisiera que mi hijo(a) participe en una o mas de las siguientes actividades.

- ☐ Summer activity programs / Programas de actividades de verano
- ☐ Weekday playgroup / Grupo de juego entre semana
- ☐ After school homework assistance / Asistencia de tarea escolar
- ☐ Mentoring program / Programa de Mentor
- ☐ Boy Scout/Girl Scout
- ☐ Reading program / Programa de lectura
- ☐ Health & Fitness / Salud y Deportes
- ☐ Computer class / Clase de computacion

2. I would like my teen to attend one or more of these programs or activities. / Me gustaria que mi hijo(a) adolescente participe en uno o mas de los siguientes programas

- ☐ Summer activity programs / Programas de actividades de verano
- ☐ After school homework assistance / Asistencia de tarea escolar
- ☐ Mentoring program / Programa de Mentor
- ☐ Boy Scout/Girl Scout
- ☐ Volunteer program / Programa de tutor
- ☐ Health & Fitness / Salud y Deportes
- ☐ Computer class / Clase de computacion
- ☐ Reading program / Programa de lectura

3. I would be interested in attending one or more of these programs or activities. / A mi me gustaria participar en uno o mas de los siguientes programas o actividades

- ☐ Computer class / Clase de Computacion
- ☐ Adult ESL – Ingles como Segundo idioma
- ☐ Adult Reading Program / Programa de lectura de adultos
- ☐ Volunteering / Voluntariado
- ☐ Nutrition & Cooking / Cocina & Nutricion
- ☐ Crafts class / Clase de artesanias

4. I would like information about these types of programs. / Me gustaria obtener informacion sobre estos programas:

- ☐ Medical facilities / Facilidades medicas
- ☐ Family violence counseling / Orientacion de violencia familiar
- ☐ Crime/Gang prevention / Prevencion the crimen y pandillas
- ☐ Child Support / Pension Alimentaria / Manutencion de Menores
- ☐ Drug/Alcohol Treatment / Tratamiento de Alcoho/Drogas
- ☐ Family counseling / Orientacion familiar
- ☐ Dental treatment / Tratamientos dentales
- ☐ Women’s Health / Salud femenina
- ☐ Immunizations / Vacunas
- ☐ Other / Otro

5. If you are interested in programs that have not been listed, please write them in the following spaces: Si esta interesado en un programa que no ha sido listado, por favor dejenos saber en este espacio

6. I would like to see the programs offered during: / Me gustaria que los programas se ofrezcan durante:

- ☐ Morning / Manana
- ☐ Afternoon / Tarde
- ☐ Evening / Noche
- ☐ Weekday / Entre Semana
- ☐ Weekend / Fin de Semana

7. I would be interested in volunteering with one or more of the following programs/activities: / Me gustaria ser voluntario con una o mas de las siguientes programas / actividades

- ___Homework assistance / Asistencia de tarea escolar
- ___Computer class / Clase de Computacion
- ___Mentoring / Programa de Mentor
- ___Music / Musica
- ___Health/Fitness / Salud y Deportes
- ___Crafts / Clase de artesanias
- ___Parties / Fiestas
- ___Reading/Library / Lectura/Biblioteca

8. This is my household breakdown: / En mi hogar hay:

#Adults / Adultos	Ages / Edades	Male/Female / Masculino / Femenino
_____	_____,_____,_____,_____	_____
#Children/Teens / Hijos/Adolescentes	Ages / Edades	Male/Female Masculino/ Femenino
_____	_____,_____,_____,_____	_____

9. ___Yes, please contact me regarding these services offered to my community. / Si, por favor contacteme acerca de estos servisioc ofrecidos a mi comunidad.

___No, please do not contact me regarding these services offered to my community. / No, por favor no me contacte

Name(s): _____

Apt.# _____

Phone# _____

The Good Neighbor Program would like to thank you for taking the time to complete this survey. We welcome your suggestions and comments and look forward to meeting you.

El Programa del Buen Vecino gustaria agradecerle por tomarse el tiempo para completer esta encuesta. Bienvenimos sus sugerencias y comentarios y esperemos conocerlo pronto.

Services are based on availability and the discretion of the Activity Coordinator.

Los servicios estan basados en disponibilidad y a la discrecion del coordinador de la actividad.



PORTFOLIO
RESIDENT SERVICES

The [REDACTED] Apartments

Confidential Resident Survey

The Good Neighbor Program is provided free of charge to the residents of your apartment community.

In order for us to better address the needs of this community, we ask that you complete this survey.

1. Resident Information

Name(s)

Apartment
#

Email
Address

Phone
Number

2. I would like my child to attend one or more of these programs or activities:

☐ Summer activity programs

☐ After school homework/tutoring

☐ Mentoring program

☐ Boy Scout/Girl Scout

☐ Weekday playgroup

☐ Health & fitness

☐ Computer class

☐ Reading Program

3. I would like my teen to attend one or more of these programs or activities:

☐ Summer activity programs

☐ After school homework/tutoring

☐ Mentoring program

☐ Boy Scout/Girl Scout

☐ College preparation

☐ Volunteer program

☐ Health & fitness

☐ Computer class

☐ Self-esteem building

☐ Outside games/activities

4. I would be interested in attending one or more of these programs or activities:

- ☐ Computer class
- ☐ Adult ESL
- ☐ Continuing education
- ☐ Job & career assistance
- ☐ Financial planning/budgeting/credit
- ☐ Volunteering
- ☐ Nutrition/cooking
- ☐ Bingo/games
- ☐ Crafts class
- ☐ Exercise Class
- ☐ Health & Fitness

5. I would like information/resources about these types of programs:

- ☐ Medical facilities
- ☐ Family violence counseling
- ☐ Crime/gang prevention
- ☐ Immunizations
- ☐ Drug/alcohol treatment

- ☐ Family counseling
- ☐ Dental treatment
- ☐ Women's health
- ☐ Child support
- ☐ Financial Assistance

6. If you are interested in programs that have not been listed, please add them below:

//

7. I would like to see the programs offered during:

- ☐ Morning
- ☐ Afternoon
- ☐ Evening
- ☐ Weekday
- ☐ Weekend

Thank you for taking the time to complete this survey.

Services are based on availability and the discretion of the Resident Services Coordinator.

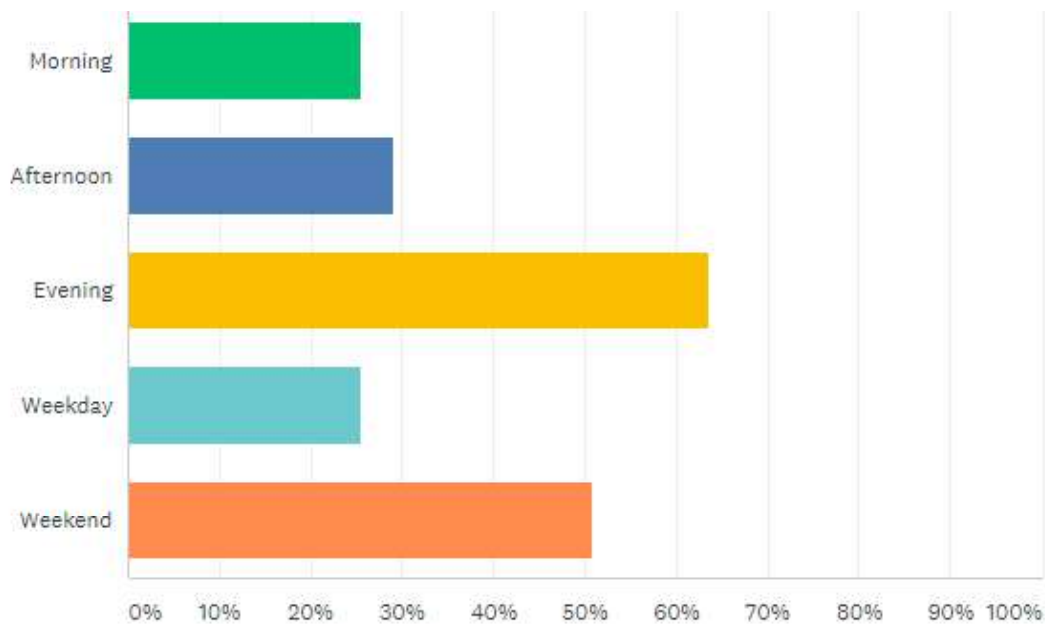


PORTFOLIO

RESIDENT SERVICES

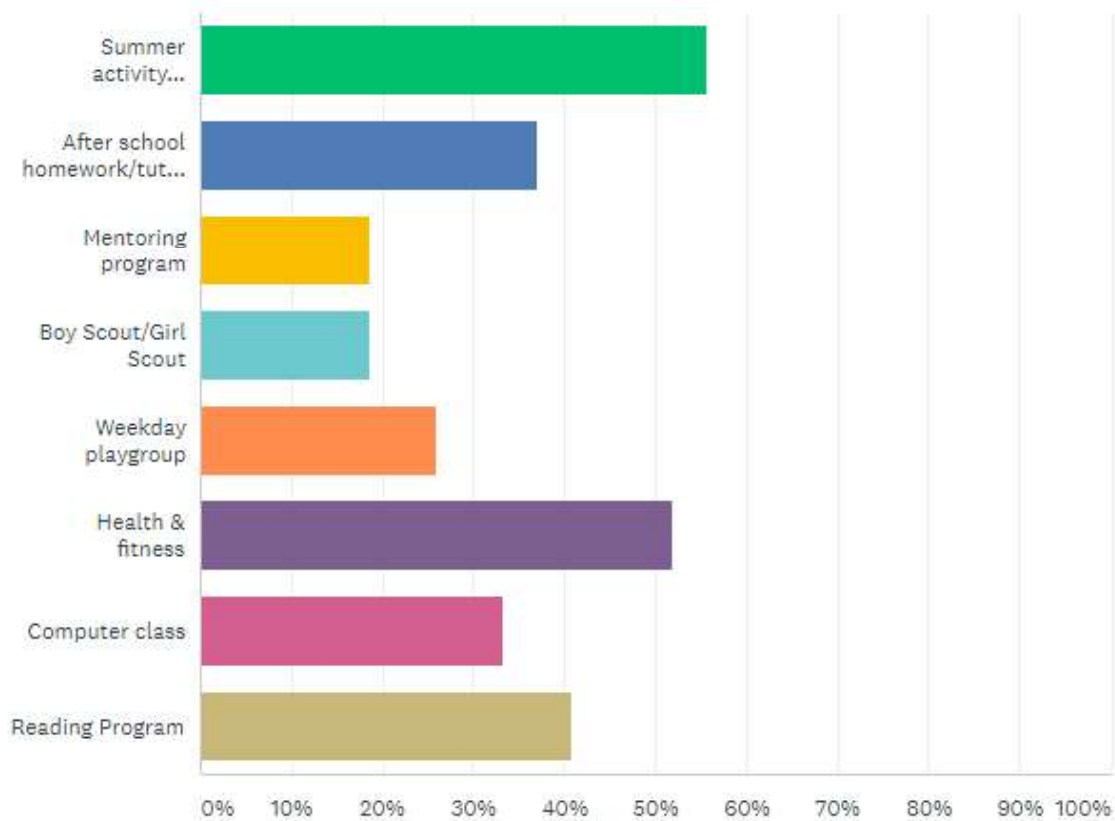
My Favorite Apartments Resident Survey Information – Feb. 10, 2021

SCHEDULE PREFERENCES (56 residents responded)



Morning	14
Afternoon	16
Evening	35
Weekday	14
Weekend	28

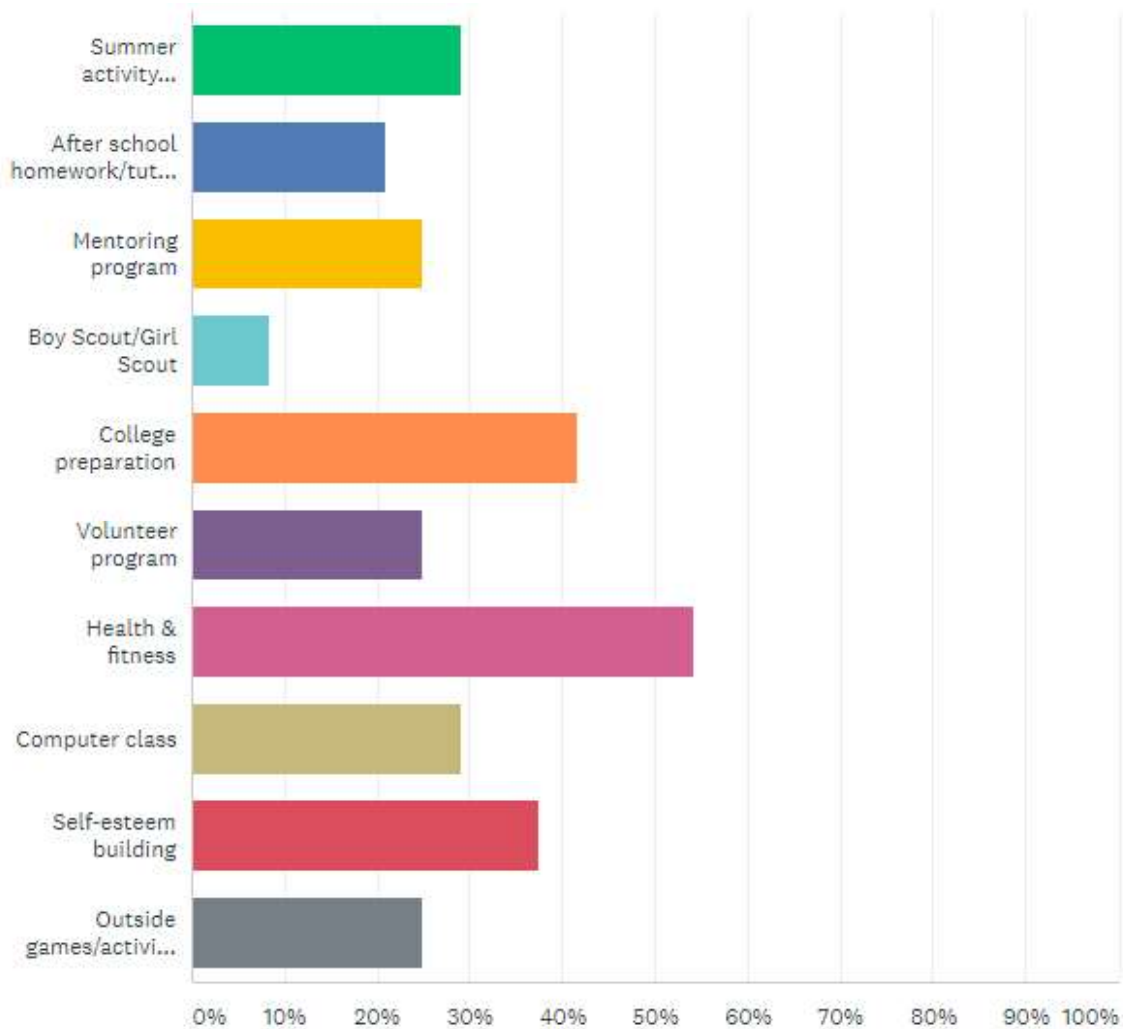
CHILDREN'S ACTIVITIES (27 out of 56 residents responded)



Summer activity programs	15
After school homework/tutoring	10
Mentoring program	05
Boy Scout / Girl Scout	05
Weekday playgroup	07
Health & fitness	14
Computer class	09
Reading program	11

TEEN ACTIVITIES

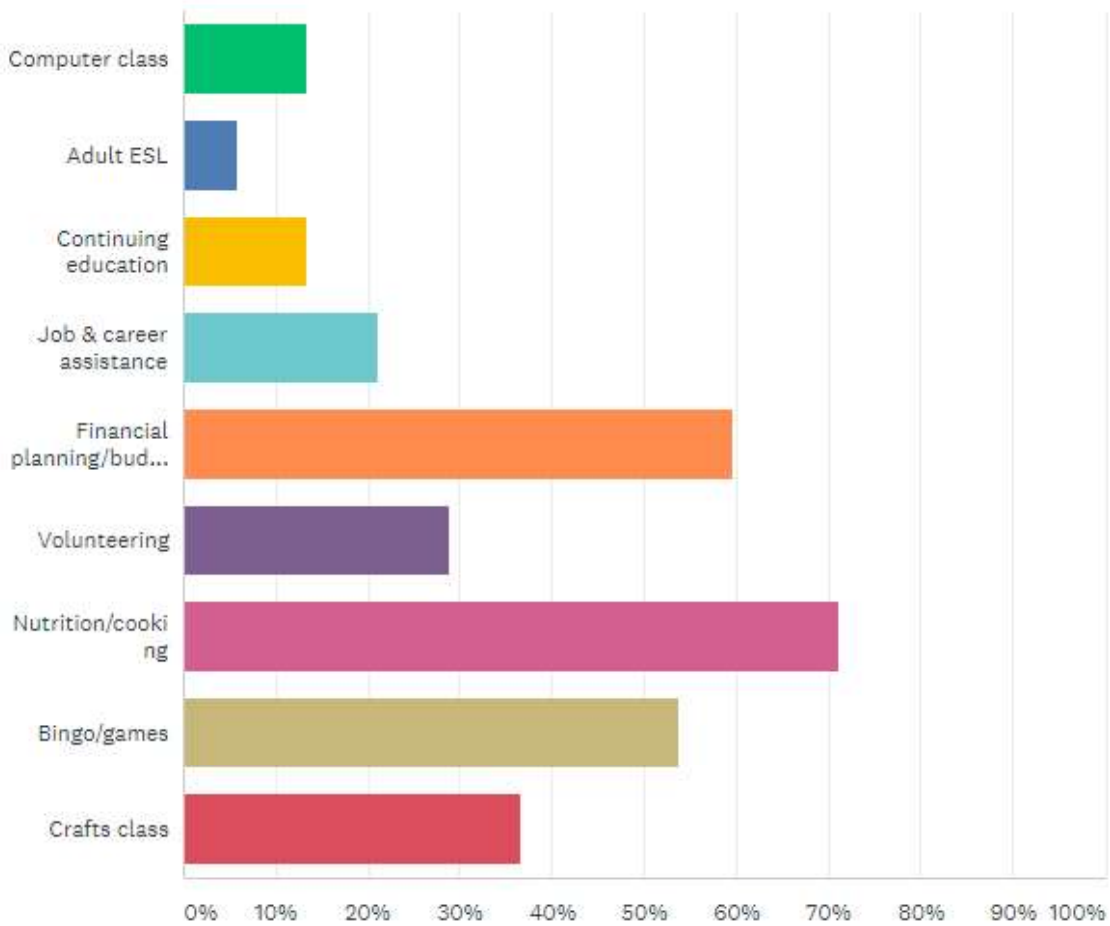
(24 out of 56 residents responded)



Summer activity programs	07
After school homework/tutoring	05
Mentoring program	06
Boy Scout / Girl Scout	02
College preparation	10
Volunteer program	06
Health & fitness	13
Computer class	07
Self-esteem building	09
Outside games/activities	06

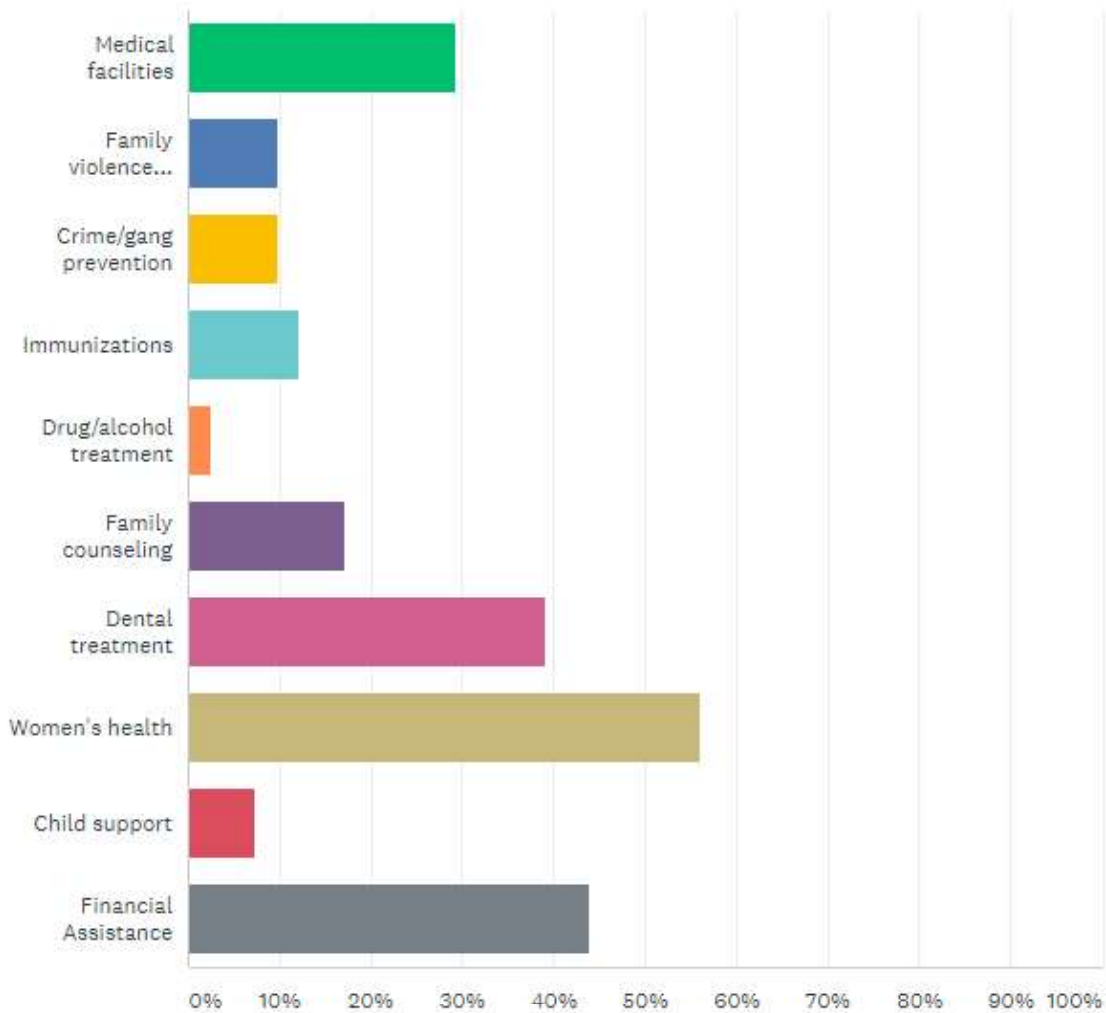
ADULT ACTIVITIES

(52 out of 56 residents responded)



Computer class	07
Adult ESL	03
Continuing Education	07
Job & career assistance	11
Financial planning/budgeting/credit	31
Volunteering	15
Nutrition/cooking	37
Bingo/games	28
Crafts class	19

ADDITIONAL REQUESTED INFORMATION (41 out of 56 residents responded)



Medical facilities	12
Family violence counseling	04
Crime/gang prevention	04
Immunizations	05
Drug/alcohol treatment	01
Family counseling	07
Dental treatment	16
Women's health	23
Child support	03
Financial assistance	18



PAINT *& Sip* Event

Enjoy tasty treats & wine as our talented art instructor leads us in creating a beautiful piece of art.

SATURDAY, SEPT 28TH 3-4PM
SEDONA VILLAGE



PORTFOLIO
RESIDENT SERVICES

GOOD NEIGHBOR PROGRAM

**T. Evan Henderson, Resident Services Coordinator
Sedona Village**



Brunch & Bingo

Residents came out and enjoyed a fun game of bingo with some fantastic prizes as well as a delicious brunch!



GOOD NEIGHBOR PROGRAM

Janet Turner, Resident Services Coordinator
Magnolia Estates Apartment Homes

Our residents enjoyed our “Casino Holiday Party”- complete with casino dealers, appetizers, and a fun gift exchange. Many residents learned how to play Roulette and Blackjack for the first time, and dealers were patient and amazing!



A Mississippi Campaign List

Note: All Activity titles (Campaign Titles) must come from the list.

	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter		
Campaigns(Activity Titles)	When you schedule a LURA (or Corporate Level Event) you can track it here.											
LURA Campaigns	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. After School Programs												
2. Education Programs (Computer Classes,												
3. Family Skills Development												
4. Fun and Freedom Activities Program												
5. Health and Nutrition Services												
6. Job Training Programs												
7. Neighborhood Pride and Leadership Skills												
Corporate Level Campaigns												
1. GNP Born Ready												
2. GNP Fruits of Labor												
3. GNP Women's Group												
4. National Night Out												
5. Operation Back to School												
6. Summer Lunch Program												
Elective Campaigns												
1. Adult Development												
2. Non GNP												
3. Program Coordination												
4. Social Services & Referrals												
5. Youth Development												

*Details for the Corporate Level Campaigns will be provided to you as needed. **You may add any subtitle you like to the above Campaign (Activity) Titles.

PULSE POINTS

OVER 140 DIFFERENT LESSONS DESIGNED TO BE FLEXIBLE AND ADJUSTABLE TO EACH SITE'S NEEDS AND SCHEDULE.

AREAS OF IMPACT INCLUDE:

ADULT DEVELOPMENT
FAMILY DEVELOPMENT
YOUTH DEVELOPMENT
NEIGHBORHOOD DEVELOPMENT
HEALTH & NUTRITION
JOB & CAREER DEVELOPMENT
SOCIAL SERVICES & REFERRALS
RECREATIONAL ACTIVITIES

ENHANCED PULSE POINTS

INCLUDES A VIDEO COMPONENT TO ENHANCE THE MATERIAL AND ALLOW FOR UNIQUE STORIES OR INFORMATION TO BE SHARED AT MULTIPLE PROPERTIES


DISASTER RELIEF
STRENGTH & POSTURE EXERCISES FOR SENIORS
BUILDING BRIDGES WITH LAW ENFORCEMENT
PEN PALS
BUILDING COMMUNITIES
ELDER ABUSE
TEAMWORK CHALLENGE
BOYS TO MEN
FAMILIES IN TRANSITION
EASTER EGGSTRAVAGANZA
CYBER SAFETY
PROJECT DERM
APP-ODOGY
NUTRITION
HOUSECLEANING 101
FINANCIAL LITERACY



PORTFOLIO
RESIDENT SERVICES

PRS REPORTING SAMPLES

Good Neighbor Program -Lesly Reynaga Sandoval, Resident Services Coordinator Please send questions or suggestions to: lrsandoval@prspurpose.org

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		<u>Community Garden*</u> Harvesting Basil Plants 9:00 AM - 10:00 AM <u>Neighborhood Development</u> Community Partner Outreach 10:00 AM - 12:00 PM	<u>Neighborhood Development</u> Community Outreach: Rent & Utility Assistance 9:00 AM - 10:30 AM <u>Youth Development</u> Live With the Librarian 10:30 AM – 12:00 PM	<u>Financial Planning Assistance or Course*</u> Mobile Banking 9:00 AM - 10:00 AM <u>Counseling Service*</u> Any Baby Can 10:00 AM - 12:00 PM	<u>GED Preparation*</u> Math Focus 9:00 AM - 10:00 AM <u>English as a Second Language*</u> Placement Test 10:00 AM - 11:00 AM <u>Neighborhood Development</u> Community Outreach: One-on-One Information 11:00 AM - 3:00 PM <u>Youth Program*</u> Snacks and Slime 3:00 PM - 5:00 PM	
6	7	 <u>Computer Facility*</u> By Appointment 9:00 AM - 10:00 AM <u>Health and Nutritional Course*</u> Heart-Healthy Recipes 10:00 AM - 12:00 PM	<u>Neighborhood Development</u> Community Outreach: Rent & Utility Assistance 9:00 AM - 10:30 AM <u>Youth Development</u> Live With the Librarian 10:30 AM – 12:00 PM	<u>Home Buyer Education*</u> Habitat for Humanity 9:00 AM - 10:00 AM <u>Family Development</u> Tips for Home Schooling 10:00 AM - 12:00 PM	<u>Welfare Programs*</u> SNAP Enrollment 9:00 AM - 10:00 AM <u>Basic Adult Education*</u> Reading Skills 10:00 AM - 11:00 AM <u>Neighborhood Development</u> Community Outreach: One-on-One Information 11:00 AM - 3:00 PM <u>Youth Program*</u> Snacks and Homework 3:00 PM - 5:00 PM	12
13	14	<u>Legal Assistance*</u> Immigration Law 10:00 AM - 11:00 AM <u>Neighborhood Development</u> Community Partner Outreach 11:00 AM - 12:00 PM	<u>Health Screening Service*</u> COVID Online Assessment 10:00 AM - 11:00 AM <u>Youth Development</u> Live With the Librarian 11:00 AM – 12:00 PM	<u>Credit Counseling*</u> Track Your Score 11:00 AM - 1:00 PM	<u>Transportation*</u> Cap Metro & COVID 9:00 AM - 10:00 AM <u>State Workforce Development*</u> Resources for Dislocated Workers 10:00 AM - 11:00 AM <u>Neighborhood Development</u> Community Outreach: One-on-One Information 11:00 AM - 3:00 PM <u>Youth Program*</u> Snacks and Homework 3:00 PM - 5:00 PM	19
20	21	<u>Vocational Training*</u> Workforce Commission 10:00 AM - 11:00 AM <u>Neighborhood Development</u> Community Outreach: Door-to-Door Info 11:00 AM - 12:00 PM	<u>Health and Nutritional Course*</u> Meal Prep Ideas 10:00 AM - 11:00 AM <u>Youth Development</u> Live With the Librarian 11:00 AM – 12:00 PM	<u>GNP Women's Group</u> Pamper Yourself at Home 10:00 AM - 12:00 PM	Del Valle ISD invites you to get FREE MEALS for students on property (Look for the school bus in the parking lot) Monday – Friday at 7:30 am	
27	28	29	30			

Don't Forget... All programs are FREE to residents! Sign Up Today!



PORTFOLIO
RESIDENT SERVICES

DO YOU NEED HELP WITH RENT ASSISTANCE?

We want to help your family connect with local resources!

¿BUSCA RECURSOS PARA PAGAR SU RENTA?

Queremos ayudarlo a conectarse con recursos locales



Contact Lesly Reynaga

Resident Services Coordinator, Santora Villas

Please email lrsandoval@prspurpose.org

Ponte en contacto con Lesly Reynaga

Coordinadora de Servicios para Residentes, Santora Villas

Favor de enviar correo electrónico a lrsandoval@prspurpose.org

Santora Villas

The Good Neighbor Program



Del Valle ISD invites you to get
FREE MEALS for students on property
(Look for the school bus in the parking lot)
Monday-Friday at 7:30 a.m.

and

Live With the Librarian
Book reading, as well as free books and
school supplies
(In front of the office)
Wednesdays at 10:30 a.m.

Del Valle ISD te invita a recibir
comidas **GRATIS** para estudiantes
(Busca el autobús escolar estacionado)
Lunes a Viernes a las 7:30 a.m.

y

En Vivo co el Bibliotecario
Lectura de libros, al igual que libros y útiles
escolares gratis
(Enfrente de la oficina)
Los Miércoles a las 10:30 a.m.

Questions? Alguna Pregunta?

Contact Lesly Reynaga

Resident Services Coordinator / Coordinadora de Servicios Para Residentes

lrsandoval@prspurpose.org | 512.666.7738



PORTFOLIO
RESIDENT SERVICES



Good Neighbor Program

Monthly Event Summary Report

Report Summary

				Month & Year:	August 2020
Portfolio Member:	Rosemont at Bethel Place				
Resident Services Coordinator:	Kimberly Rendon	Total Male Participants:	228	Contribution Value:	\$11,164.68
Occupancy Rate:	92.00	Total Female Participants:	491	GIK Goods/Donations:	\$9,634.68
New Residents Enrolled:	2	Total Participants:	719	GIK Services:	\$1,530.00
Total Activities:	47	Total Youths:	274	Total Volunteer Hours:	102.00
Total Hours:	85.00	Total Adults:	335		
		Total Seniors:	108		

Freq.	# of Hrs.	Title	Description	# of Persons	Provided by GNP &:	Lura Req
1	8.00	Administration	Administration	0		
1	1.00	Adult Education Program*	Job Training	10		Adult Education Program - Adult education programs (ie: ESL, job training, life skills, parenting and nutrition classes, etc.)
1	1.00	Adult Education Program*	Nutrition	5		Adult Education Program - Adult education programs (ie: ESL, job training, life skills, parenting and nutrition classes, etc.)



Good Neighbor Program

Monthly Event Summary Report

1	1.00	Adult Education Program*	ESL Online Sites	0		Adult Education Program - Adult education programs (ie: ESL, job training, life skills, parenting and nutrition classes, etc.)
1	1.00	Adult Education Program*	Parenting	22		Adult Education Program - Adult education programs (ie: ESL, job training, life skills, parenting and nutrition classes, etc.)
5	7.00	After School Program*	Tutoring	106	Residents	After School Program - After School Program in conjunction with local schools
1	2.00	Community Outreach Program*	7th Generation Curbside Pamper Pickup	14		Community Outreach Programs
1	2.00	Community Outreach Program*	7th Generation Curbside Diaper Pickup	12		Community Outreach Programs
1	1.00	Computer Education*	Zoom Conferencing	12		Computer Education
2	2.00	Emergency Assistance & Relief*	Rent & Utility Assistance	14		Emergency Assistance and Relief
1	1.00	Family Counseling/Domestic Crisis Intervention*	Child Safe	12		Family Counseling/Domestic Crisis Intervention



Good Neighbor Program

Monthly Event Summary Report

1	1.50	Health Screening*	At Home Screenings	4		Health Screening - Health Screenings and Immunizations
1	1.00	Immunizations*	School Immunizations	6		Immunizations - Health Screenings and Immunizations
1	1.00	Individual Development Account*	Balancing Your Finances	5		Individual Development Account Program - IDA
1	2.00	Operation Back to School	Curbside Supply Giveaway	105	HEB-Gift Card,Target-Gift Card,District 7-Backpacks,Jubilee-Case of Water,UCAS-Haircut Coupons,CPS Energy-Pencil Case w/Pencil Bag,Residents	
4	7.00	Program Coordination	Resident Outreach	75		
1	2.50	Program Coordination	Food Fair Setup	7	SA Food Bank-Food, Snacks & Household Items,Residents	
1	2.00	Program Coordination	Open Assistance	12		
1	3.00	Program Coordination	Operation Back to School Setup	5	Residents	
2	3.00	Program Coordination	1 on 1 Appointments	33		
2	4.00	Program Coordination	Back to School Donations	39		
1	2.00	Program Coordination	Resource Distribution	14		
2	3.00	Program Coordination	Food Fair Clean Up	11		
1	2.00	Program Coordination	Distribute Resources	22		
1	1.00	Program Coordination	Elf Louise Training	0		
1	2.50	Program Coordination	Food Fair Set Up	5		
1	1.00	Program Coordination	PRS LURA Compliance Refresher Training	0		



Good Neighbor Program

Monthly Event Summary Report

1	1.50	Program Coordination	Operation Back to School Donations	10		
1	1.00	State Workforce Development*	TWC Resume Building	6		State Workforce Development
4	8.00	Summer Lunch Program	Grab & Go Lunch	59	SA Food Bank-Food, Snacks & Household Items	
1	1.00	Vocational Guidance*	Job Listings and Ways to Search for Employment	10		Vocational Guidance
1	3.00	Welfare Program Assistance*	SAFB Food Fair Pick Up Distribution	37		Welfare Program Assistance
1	3.00	Welfare Program Assistance*	SAFB Food Fair	32	Residents,SA Food Bank-Food, Snacks & Household Items	Welfare Program Assistance
1	2.00	Welfare Program Assistance*	7th Generation Curbside Diaper Pickup	15	7th Generation-Diapers, Baby Food & Other	Welfare Program Assistance

Property Manager's Signature

Date

Comments

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DAILY TIME TRACKER



Auto-Fill Version – Click and use Drop Down Boxes to choose your answers.

RSC NAME: Susie Sanders	SITE: Seashells by the Seashore Apartments	DATE: 6/1/2020
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CALENDAR SCHEDULE

List programs exactly as they appear on your approved calendar in this section.

Program	Time From/To	Carried Out?	Description	# of Participants
Resident Outreach	10am/12pm	On Site	Distributed surveys, followed up on appts.	7
Grab and Go' Lunches	12pm/2pm	On Site	Distributed bagged hot dogs, chips, drink	15
Food Pantry	2pm/4pm	On Site	Distributed food and household necessities	5
Zoom Bingo	4pm/5pm	On Site	Played Bingo via Zoom site to home calls	8

OUTREACH CONTACT LOG

List additional contacts you made during your program day.

Name	Apt. #	Method	Type	Details
Tiny Tim	314	Visit	Resident	Followed up on requested Utility Assist. resources
Ginny Gorgeous	277	Visit	Resident	Homebound, stopped by to say hello and check on
Buccee's Restaurant		Phone Call	Community Partner	Requested donations for Grab n' Go lunches
Margaret Mindful		Visit	Mgmt.	Met to plan July calendar, special events
Capital City Food Bank		Phone Call	Community Partner	Contacted to set up distribution event
Food World Grocery		Email	Community Partner	Sent thank you note for last month's donations
Felix Boudreaux	402	Zoom	Resident	Requested Zoom training for online learning needs
Tammy Thibodeaux	609	Phone Call	Resident	Set an appt. for assistance with SNAP application
Samuel Sunshine	419	Visit	Resident	Assisted with completing SNAP application
Ramona Roark	111	Visit	Resident	Screened for benefits and referred to SNAP site to apply

RENTAL/UTILITY ASSISTANCE LOG

Resident's Name	Apt. #	Method	Referral Agency	Outcome (Approved, Amount, etc.) Remember, log as donations on Reporting Form as well.
Tony Stark	210	Visit	Jackson County Civic Action	Denied, received assistance already
Bruce Wayne	412	Visit	Jackson County Civic Action	Approved, \$100/month
Peter Parker	213	Visit	Texas Power Co.	Unknown
Sheriff Woody	455	Email	Singing River Electric	Approved for one-time payment of \$300
Lightning McQueen	419	Email	Jackson County Civic Action	Approved, \$150/month
Mike Wazowski	230	Email	Texas Power Co.	Denied, funds ran out

TOTAL HOURS WORKED: 7

Please continue your Contact Log on a second sheet if needed. Select File/"Save As" to name this form with date. Email it to your Regional Coordinator at the end of each week.

DAILY TIME TRACKER

Auto-Fill Version – Click and use Drop Down Boxes to choose your answers.



RSC NAME: Gabriella Gandara	SITE: Enclave at Copperfield	DATE: 12/22/2020
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List programs exactly as they appear on your approved calendar in this section.

CALENDAR SCHEDULE				
Program	Time From/To	Carried Out?	Description	# of Participants
Adult development: meditation tips for stress relief	10:30 am/12 pm	On Site	Emailed meditation tips for stress relief, per resident request.	21
Family development: enhance child's nutrition & education	12 pm/1 pm	On Site	Emailed tips for enhancing child's nutrition, per resident request.	16
Health & nutrition: at home bp check	1 pm/2:30 pm	On Site	Emailed at home bp check manual, per resident request.	16
Youth development: holiday brain teasers + grab n go meals	2:30 pm/4:30 pm	On Site	Distributed kids lunches and holiday brain teasers.	11

List additional contacts you made during your program day.

OUTREACH CONTACT LOG				
Name	Apt. #	Method	Type	Details
Lotts bakery and cafe		Visit	Community Partner	Picked up kids lunches for the day.
Bike barn		Visit	Community Partner	Picked up gift card for holiday raffle for sugarcreek.
Monica	532	Visit	Resident	Picked out holiday kids pajamas.
Maria	715	Visit	Resident	Picked out holiday kids pajamas.
Terrence	1031	Visit	Resident	Picked out holiday kids pajamas.
Jasmine	928	Visit	Resident	Picked out holiday kids pajamas.
Melissa	1112	Visit	Resident	Picked out holiday kids pajamas.
rosa	717	Visit	Resident	Picked out holiday kids pajamas.
Shams Alshawhi	727	Visit	Resident	Picked out holiday kids pajamas.
		Choose an item.	Choose an item.	
		Choose an item.	Choose an item.	

RENTAL/UTILITY ASSISTANCE LOG				
Resident's Name	Apt. #	Method	Referral Agency	Outcome (Approved, Amount, etc.) Remember, log amts. as donations on Reporting Form as well.
Barbara Johnson	1032	Zoom	Cypress Area Ministries	Resident will receive \$950.00 in rental assistance
Carlos Casilles	321	Visit	Cypress Area Ministries	Pending (updated required documents)
		Choose an item.		
		Choose an item.		

		Choose an item.		
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TOTAL HOURS WORKED: 6

Please continue your Contact Log on a second sheet if needed. Select File/"Save As" to name this form with date. Email it to your Regional Coordinator at the end of each week.

LURA Summary

Santora Villas

Lura	Activity	Date
Basic Adult Education		
	Basic Adult Education*	1/22/2020
	Basic Adult Education*	4/1/2020
	Basic Adult Education*	5/18/2020
	Basic Adult Education*	6/16/2020
	Basic Adult Education*	7/21/2020
	Basic Adult Education*	8/27/2020
	Basic Adult Education*	9/11/2020
Community Gardens		
	Community Garden*	1/29/2020
	Community Garden*	4/3/2020
	Community Garden*	5/15/2020
	Community Garden*	7/1/2020
	Community Garden*	8/11/2020
	Community Garden*	9/1/2020
Computer Facilities		
	Computer Facility*	1/17/2020
	Computer Facility*	4/3/2020
	Computer Facility*	5/15/2020
	Computer Facility*	6/5/2020
	Computer Facility*	7/14/2020
	Computer Facility*	8/19/2020
	Computer Facility*	9/8/2020
Counseling Services		
	Counseling Service*	1/6/2020
	Counseling Service*	4/7/2020
	Counseling Service*	5/25/2020
	Counseling Service*	6/19/2020
	Counseling Service*	7/24/2020
	Counseling Service*	8/21/2020
	Counseling Service*	9/3/2020
Credit Counseling		



PORTFOLIO
RESIDENT SERVICES

RESIDENT RETENTION COLLABORATION:

- Partnership with Property Management
- List of new move-ins & resident renewal dates
- Phase 2 of new resident's paperwork completion; Meet your Coordinator
- Online Reviews during Programs
- Resident Contact Information & Delinquency Report



PORTFOLIO
RESIDENT SERVICES

COVID-19 SUCCESS STORIES



Community: 3 Springs Apartments and Forestwood Apartments
Resident Services Coordinator: Alexis Adame

Date: August, 2020



NARRATIVE:

Our first month here at 3 Springs and Forestwood Apartments our focus was on introducing the Good Neighbor Program to residents during COVID-19. Through partnership with the City of Balch Springs, we were able to connect parents with the Back to School Event at the Balch Springs Recreation Center. Not only did they load our cars with backpacks to ensure students had all the supplies needed to continue learning, they also loaded us with food to share with residents in need.

Portfolio Resident Services

www.PRSpurpose.org

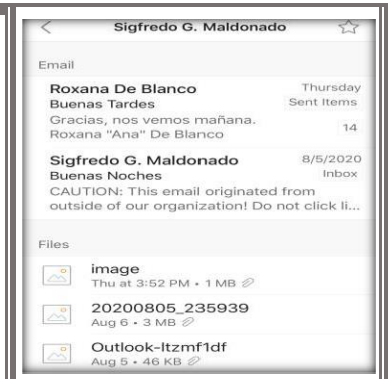


Good Neighbor Program Success Story

Community: Sansom Ridge Community

Date: August, 2020

Resident Services Coordinator: Osmin and Roxana De Blanco



NARRATIVE:

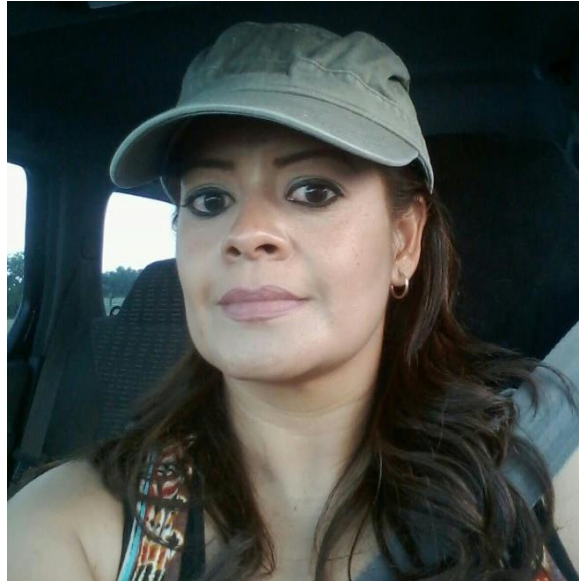
Sometimes we run away from challenging situations and other times that overwhelming humanitarian feeling is what calls us to confront the situation with action. Many organizations have received funding to assist with COVID-19 crisis. Unemployment has skyrocketed since March, and delinquencies in rent and utility payments have followed. Fort Worth has allocated \$15.4 million in CARES Act funds from the federal government for housing-related activities. Likewise, Catholic Charities Diocese of Fort Worth provides emergency financial assistance and case management to eligible families in crisis depending on availability of funds. Eligible recipients can be awarded up to \$1,200 towards rental assistance once the process has been finalized. Sansom Pointe has families in need of an array of services, but getting rental assistance is easier said than done. It takes a team armed with patience, compassion and advocacy to have a successful outcome. The Maldonado family was devastated since they had received an eviction notice due to a delinquent balance. A hard-working father of three beautiful little girls was severely affected by the struggles of COVID-19. His wife came to the first meeting with her three-month-old baby, still breastfeeding and worried about her family. The process got started in early August and the family was aware that financial assistance was not guaranteed. It took seven emails to our community partner, fifteen emails to the resident, two resident home visits by coordinators, one intake visit by a community partner and constant updates/interactions (in person and by email) with property manager to succeed. Two weeks later, the Maldonado family received a pledge from Catholic Charities in the amount of \$1,200. Moreover, an action plan was designed for Mr. Maldonado using a solution-focused approach to regain his housing stability. As of today, this family has lowered their past due balance of over \$3,000 to \$400.00. The Maldonado family has expressed their gratitude to the Good Neighbor Program and feel fortunate to have been granted assistance. The whole family received a certificate and celebrated along with coordinators and property manager. It was a moment of joy, a moment of grace and belief to see all together as one for the same cause!



Community: Santora Villas

Date: June 2020

Resident Services Coordinator: Lesly Reynaga



NARRATIVE:

Leticia Diaz was one of our residents at Santora Villas in April. Lety reached out to us after seeing that we assist with resources for families that have been impacted by the COVID-19 crisis. She explained to me that she had lost her job in the service industry since the pandemic started, and she was having a really hard time making ends meet. Lety doesn't qualify to receive unemployment or financial support through the CARES Act. We were able to connect Lety with financial assistance through El Buen Samaritano, one of the organizations distributing RISE funds in Austin. She confirmed with me that she was able to receive a \$400 gift card from El Buen. She was very grateful to count on this support during the COVID-19 unemployment crisis.



Community: Stallion Pointe
Resident Services Coordinator: Kevin Moreno

Date: July, 2020



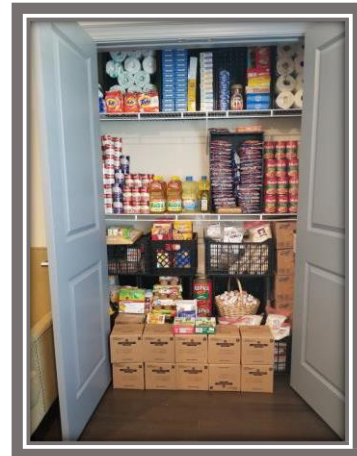
NARRATIVE:

Stallion Pointe residents were donated 30 backpacks with school supplies totaling close to \$150 in July. New Resident Services Coordinator, Kevin Moreno stepped up to the plate and set up a great display table for residents. One Believe Organization plans to continue partnering with Stallion Pointe in the future to continue to provide resources to residents and the children. Thank you ONE BELIEVE ORGANIZATION! Now our children are prepared to continue their education. One Believe Organization will be donating more school supplies as school steadily begins.



Community: Sansom Pointe Senior
Resident Services Coordinator: Osmin and Roxana De Blanco

Date: August, 2020



NARRATIVE:

Sansom Pointe Seniors had a meet and greet with their new coordinators. Listening to the populations that we serve is key to determine their needs. Therefore, by conducting brief needs assessments with our seniors, gave us the data to determine that an on-site food pantry had to be established immediately. It was found that some of our seniors are suffering from food insecurity. Listening to someone's needs is not enough if action is not taken. Plan implementation in conjunction with property management's approval of the proposal made this a reality for the community that we serve. Now, the *Golden Generosity Pantry* has been born. Within four days our seniors were receiving their first distribution. Property management and our seniors couldn't believe it! Our seniors came in with confidence to get rice, pasta, canned goods, paper goods, oil, fresh fruits and vegetables. They have expressed their gratitude and they are treated with dignity and respect. Seniors are aware that they can show up at anytime when the coordinator is scheduled, and request food and food will be provided instantly; no questions asked. A senior had me in tears by saying "Now, I know I will not go hungry again". Another senior prayed for the *Golden Generosity Pantry* to continue receiving donations and blessed the food provided.

2.8 Property and Asset Management

The key to maintaining a positive relationship between an apartment property and the surrounding community is effective property management. The on-site property manager must insist on enforcing the lease terms to protect the interests of all residents and the safety of the community. A strong central management company back-office must ensure residents meet the stringent tax credit eligibility requirements and support the manager's initiatives.

Alpha Barnes Real Estate Services has demonstrated the capacity to provide exceptional property management services both to the resident and property owner. Having more than twenty years in property management, Texas-based Alpha Barnes has grown to service more than 30,000 apartment homes, 21,100 of those homes being subject to the Low Income Housing Tax Credit program. The Alpha Barnes organization merged with Asset Living in Houston in 2020 which added over 65,000 additional apartment homes to its management portfolio. Alpha Barnes (and Asset Living) is an Accredited Management Organization (AMO). Per Alpha Barnes, "this AMO designation ensures that (it) has met the ongoing requirements of The Institute of Real Estate Management. These requirements include increased levels of fidelity and liability coverage, proven financial stability and continuing education for the Executive Property Managers. Less than 600 firms across the United States and Canada have achieved and maintained this prestigious designation and it is further evidence of ABRES's commitment to excellence.

The Alpha Barnes philosophy for real estate management is: "Home is one of the most important places for everyone. For this reason, we, at Alpha Barnes, are meticulous in every aspect of our responsibility. We provide personalized services to each Client, Resident and Property. The Alpha Barnes Teams focus on surpassing expectations; we understand the goals of ownership. The reputation of Alpha Barnes is based on trust, integrity and commitment."

Please review the full Alpha Barnes Qualifications Statement on the following pages.



PROFESSIONAL QUALIFICATIONS STATEMENT

STATEMENT OF PURPOSE AND PHILOSOPHY

Alpha Barnes Real Estate Services is a full-service, third-party management firm presently managing approximately 30,000 multi-family units. Founded in 2000, Alpha Barnes maintains 6 offices across 3 states and 900 staff members in the field of property management, and our portfolio extends to over 85 cities.

In late 2020, Alpha Barnes was acquired by **Asset Living**, a Houston-based real estate management firm. Founded in 1986, Asset Living holds a NMHC Top 5th Ranking with a growing portfolio well over 65,000 units, which includes a multitude of properties and employees across the nation. Combined, Alpha Barnes/Asset Living manages a portfolio of over 100,000 units to include conventional, student housing and affordable units.

Home is one of the most important places for everyone. For this reason, we, at Alpha Barnes, are meticulous in every aspect of our responsibility. Our Team aims is to provide the best home for every person who chooses to live at one of the many Alpha Barnes communities. We understand the faith our residents place in us, as well as, the fiduciary responsibility our clients place in us, these factors are the basis of our management. We provide personalized services to each Client, Resident and Property. The Alpha Barnes Teams focus on surpassing expectations; we understand the goals of ownership. The reputation of Alpha Barnes is based on trust, integrity and commitment.

Asset Living is an **Accredited Management Organization® (AMO®)**. This AMO® designation ensures that Asset Living has met the ongoing requirements of The Institute of Real Estate Management. These requirements include increased levels of fidelity and liability coverage, proven financial stability and continuing education for the Executive Property Managers. Less than 600 firms across the United States and Canada have achieved and maintained this prestigious designation and it is further evidence of ABRES's commitment to excellence.

AREAS OF EXPERTISE

The primary business of **Alpha Barnes Real Estate Services** is the management of residential, rental real estate for private owners, non-profit entities, financial institutions and government agencies. In this role, **Alpha Barnes Real Estate Services** provides comprehensive management services that cover all phases of property operations including management, leasing maintenance, financial management and owner and government compliance and reporting. Presently, the firm manages properties in all areas of Texas and operates from its main office in Dallas with regional offices in San Antonio and Austin, as well as staff based in Texarkana, Houston and Corpus Christi.

In addition to its overall expertise in apartment management, **Alpha Barnes Real Estate Services** possesses a specific capability in the management and operation of affordable housing for families or for the elderly. This category of property includes the follows:

1. Low Income Housing Tax Credit (LIHTC)

Alpha Barnes Real Estate Services presently manages over 170 properties which utilize the LIHTC. Compliance with LIHTC program requirements is controlled by direct supervisory and compliance staff review of all work and extensive training of all personnel. **Alpha Barnes Real Estate Services** takes special pride in its reputation as an expert in this program and works hard to maintain that reputation.

2. New Construction

Alpha Barnes's new construction lease-up experience is impressive. The firm's new development background includes project design consulting, pre-construction planning, décor consulting, promotion and full lease-up for over **150+ properties**, totaling over **22,000 units across Texas**. Our objective is to reach full occupancy and maximize the bottom line in the shortest time possible in accordance with the owner's investment parameters. About **75% of our lease-ups have been completed in 9 months or less** and a full **51% have been completed in 6 months or less**.

3. Value Add Experience

Real estate assets require periodic improvements, repairs, or in some cases, a complete repositioning. Alpha Barnes understands this facet of investment ownership and has maintained a personnel base with the knowledge, expertise, and experience to assist our clients when such projects are contemplated. Coordinating the rehab process with the management of the property is essential, and ABRES has perfected our role in this process to ensure operational goals are either met or exceeded. We have a proven track record of successful repositioning that have continued to earn us praise from our clients, residents, and industry peers. In fact, in recent years ABRES managed properties have undergone comprehensive rehabs ranging from \$125,000 to over \$3 million.

4. HUD Financed Properties

Alpha Barnes Real Estate Services operates projects financed by the U.S. Department of Housing and Urban Development (HUD) under the 221(d)(4) and 223(f) programs, the Section 202 program, and the Section 811 program. **Alpha Barnes Real Estate Services** is familiar with the reporting requirements of all housing related HUD programs as well as the management intricacies.

5. Properties with HUD Section 8

Alpha Barnes Real Estate Services is under contract to operate 14 entities that have projected-based Section 8 rent subsidies. In addition, **Alpha Barnes Real Estate Services** completes the paperwork for Section 8 projects for several other management companies on a contract basis. **Alpha Barnes Real Estate Services** has five Certified Occupancy Specialists' (COS) on staff.

6. Tax Exempt Bonds

Alpha Barnes Real Estate Services currently manages dozens of properties that utilized tax exempt bonds to assist in their financing and we are familiar with the restrictions imposed on leasing and the reporting requirements necessary to dovetail with the LIHTC program and to produce program compliance with both programs.

7. Non-Profit Groups and Public Agencies

As one of the primary aspects of this proposed management assignment is the ability to work with non-profit groups and public agencies, prior experience working with non-profits appears to be very important. Over its history, **Alpha Barnes Real Estate Services** has served to manage property for, consult for and to assist many non-profit groups. Current non-profit clients include:

Deaf Action Center, Dallas, Texas

Alamo Community Group, San Antonio, Texas

Texas Merced Housing Texas, San Antonio, Texas

Texas Inter-Faith Housing, Houston, Texas

Operation Relief Center, Dallas, Texas



SUMMARY OF APARTMENT MANAGEMENT SERVICES

Alpha Barnes Real Estate Services strives to provide our multi-family clients with the best and most complete services available. A summary of these five major areas of service follows:

a. MANAGEMENT AND LEASING

- Advertise, market and lease units.
- Develop and enforce property rules and regulations.
- Recruit, hire, and train on-site managers and leasing agents.
- Provide daily operating procedures and training for on-site office.
- Establish and adjust rental rates and security deposit levels based on occupancy and regular competitive market analysis.
- Administer all personnel records for all on-site management and maintenance employees.

b. MAINTENANCE

- Provide for overall routine maintenance of the property including tenant requested maintenance and make ready preparation.
- Recruit, hire, and train all on-site maintenance and porter personnel.
- Completion of cost-effective and efficient contract bidding, negotiation and administration, including, but not limited to contracts for landscaping, pool maintenance, and non-routine improvements.
- Verifying insurance and bond coverage for all contractors providing services.
- Implementation of a preventative maintenance program.
- Completion of regular property inspections to review property appearance and condition as well as overall curb appeal.
- Identifying and bringing to the attention of the Owner serious non-routine maintenance needs along with proposed solutions.
- Provide 24 hour a day, seven day a week emergency telephone answering and maintenance services.
- Maintain records of all contracts, warranties and other items important to the verification of services performed on the property.

c. COMPLIANCE

- Train all staff in the importance and basic requirement of affordable housing compliance.
- Provide ongoing supervision and retraining of staff through initial lease up and re-certifications.
- Review every file prior to move-in for completeness and eligibility.
- Monitor and maintain the applicable fraction in mixed income properties.
- Prepare for and participate in all site reviews by owners, lenders, monitoring agencies or partners.
- Prepare and submit annual certifications as well as any other reports requested by the owners, lenders, monitoring agency or the partners.

d. FINANCE

- Receipt, recording and processing of all accounts payable.
- Billing, posting receipt and depositing of rents, security deposits, vending income, late fees, electric charges, and any other miscellaneous income.
- Pursuing collection of delinquent rents to the fullest possible extent, including periodic reports to the regional credit bureau and filing of lawsuits in small claims court.
- Maintaining all files and records necessary to insure a good record of financial activities.
- Monthly reconciliation of all accounts and bank statements.
- Provision of monthly and annual financial reporting including but not limited to Balance Sheets, Income and Expense Statements, complete detailed General Ledger, and Budget Variance Analyses.
- Provide assistance and cooperation in periodic auditing.
- Compilation and submission to the client of a recommended annual budget.
- Review and recommendation of all property insurance coverage, upon request of client.

e. COMMUNICATIONS

- Frequent verbal and written communication with client and participation in property-related meetings.
- Communication and coordination with lenders, real estate agents and appraisers, as instructed by the Owner.
- Planning and assistance in coordination of any property-related social functions relative to the overall marketing plan.
- Processing of information requests from outside parties (as authorized by client) and resolution of any problem or complaint originating from property resident.

LEADERSHIP



Hugh A. Cobb CPM, Principal



Michael D. Clark HCCP, Principal



Anna Melson, VP



Connie Quillen, VP



Cathy Johnson, VP



Debbie Wiatrek, VP

GENERAL INFORMATION

Alpha Barnes Real Estate Services, LLC is an Asset Living Company. The federal tax identification number is 75-2868321. Alpha Barnes Real Estate Services can be contacted through:

Hugh A. Cobb, Principal
12720 Hillcrest, #400
Dallas, Texas 75230
972-643-3200

hugh.cobb@assetliving.com

*"People do business with people, not companies. You must earn their respect
and work hard every day to maintain what you have earned."
— Art Barnes*

ALPHA BARNES REAL ESTATE SERVICES, LLC
12720 HILLCREST RD, STE 400
DALLAS, TX 75230

Property	City	State	Zip	Units	Region	Description	AFFORDABLE UNITS
87th Apartments	Odessa	TX	79765	181	West Texas	Family	Yes
Allegre Point	Austin	TX	78728	184	Central Texas	Family	Yes
Amber Stone	Beeville	TX	78102	54	South Texas	Family	Yes
Anson Park I	Abilene	TX	79603	64	West Texas	Family	Yes
Anson Park II Apartments	Abilene	TX	79603	80	West Texas	Family	Yes
Anson Park Seniors	Abilene	TX	79603	80	West Texas	Seniors	Yes
Arbor Oaks	Odessa	TX	79761	120	West Texas	Family	Yes
Arbor Terrace	Odessa	TX	79761	128	West Texas	Family	Yes
Aspire at Live Oak	Live Oak	TX	78233	240	South Texas	Family	No
Auburn Square	Vidor	TX	77662	80	East Texas	Family	Yes
Avanti at Greenwood	Corpus Christi	TX	78417	81	South Texas	Family	Yes
Avanti East	Edinburg	TX	78542	108	South Texas	Family	Yes
Avanti Emerald Point (new construction)	McAllen	TX	78501	71	South Texas	Family	Yes
Avanti Legacy at Sienna Palms (new	Weslaco TX	TX	78599	114	South Texas	Family	Yes
Avanti Legacy Emerald Point Apartments	McAllen	TX	78501	90	South Texas	Seniors	Yes
Avanti West (new construction due June 30	Edinburg	TX	78539	72	South Texas	Family	Yes
Avondale Farms Seniors	Haslet	TX	76052	121	North Texas	Seniors	Yes
Babcock North	San Antonio	TX	78249	138	South Texas	Family	No
Babcock North II	San Antonio	TX	78248	72	South Texas	Family	Yes
Bayshore Towners	Pasadena	TX	77504	100	East Texas	Seniors	Yes
Beacon Bay Townhomes	Port Isabel	TX	78578	76	South Texas	Family	Yes
Big Bass Resort Apartments	Jacinto City	TX	77029	200	Upper Gulf Coast	Seniors	Yes
Bishop Courts	Bishop	TX	78343	60	South Texas	Family	Yes
Blue Water Garden	Hereford	TX	79045	132	Panhandle	Family	Yes
Bonham, Country Village of	Bonham	TX	75418	104	North Texas	Family	No
Bonham, Country Village of - MHP (Mobil	Bonham	TX	75418	79	North Texas	Family	No
Briarbend	Beaumont	TX	77708	40	East Texas	Family	Yes
Broadstone Apartments	Tyler	TX	75701	100	East Texas	Family	No
Buena Vida Senior Village	Corpus Christi	TX	78405	100	South Texas	Seniors	Yes
Burgandy Apartments, The	Dallas	TX	75234	111	North Texas	Family	No
Butler Brothers Building	Dallas	TX	75201	234	North Texas	Family	No
Calcasieu Apartments	San Antonio	TX	78205	64	South Texas	Family	Yes
Caldwell Heights (new construction)	Caldwell	TX	77836	72	Central Texas	Family	Yes
Carolina Chase Apartments	Dallas	TX	75240	166	North Texas	Family	Yes
Casa Ricardo	Kingsville	TX	78363	60	South Texas	Seniors	Yes
Casitas De Merced	Somerset	TX	78069	28	South Texas	Seniors	Yes
Castleridge	San Antonio	TX	78227	144	South Texas	Family	No
Catalon	Houston	TX	77084	142	Upper Gulf Coast	Family	Yes
Catalon at Paseo de la Resaca	Brownsville	TX	78526	128	South Texas	Seniors	Yes
Cayetano Villas of LaVernia	La Vernia	TX	78121	48	South Texas	Family	Yes
Cedar Park Townhomes	Cedar Park	TX	78613	226	Central Texas	Family	Yes

Property	City	State	Zip	Units	Region	Description	AFFORDABLE UNITS
Cedarwood	Huntsville	TX	77340	68	Upper Gulf Coast	Family	Yes
Cimarron Springs	Cleburne	TX	76031	156	North Texas	Family	Yes
Cliff View Village I	Dallas	TX	75241	28	North Texas	Seniors	No
Cliff View Village II	Dallas	TX	75241	28	North Texas	Seniors	No
Cliff View Village III	Dallas	TX	75241	28	North Texas	Seniors	No
Cobblestone Village	Cleburne	TX	76033	144	North Texas	Family	Yes
Country Lane Seniors - McKinney	McKinney	TX	7509	230	North Texas	Seniors	Yes
Country Lane Seniors - Temple	Temple	TX	76504	102	Central Texas	Seniors	Yes
Country Lane Seniors - Waxahachie	Waxahachie	TX	75165	102	North Texas	Seniors	Yes
Courts of Las Palomas	Kingsville	TX	78363	128	South Texas	Family	Yes
Crestshire Village	Dallas	TX	75227	74	North Texas	Family	Yes
Cypress Cove	San Antonio	TX	78238	136	South Texas	Family	No
Cypress Lofts	Sherman	TX	75092	65	North Texas	Family	No
District at Midtown (new construction)	Tyler	TX	75702	36	East Texas	Family	No
Eddison, The (FKA Canyons at 45)	Amarillo	TX	79109	328	Panhandle	Family	Yes
Edgewood Manor	Dallas	TX	75215	40	North Texas	Seniors	Yes
Edinburg Village	Edinburg	TX	78539	100	South Texas	Family	Yes
Edison Lofts (new construction)	Houston	TX	77489	126	Upper Gulf Coast	Family	Yes
El Campo Village	El Campo	TX	77437	80	South Texas	Family	Yes
Eleanor Place	San Antonio	TX	78209	9	South Texas	Family	No
Elmhurst Place	San Antonio	TX	78209	23	South Texas	Family	No
Enclave at Buckhorn Crossing	San Antonio	TX	78240	240	South Texas	Family	No
Enclave at Mira Lagos I	Grand Prairie	TX	75054	199	North Texas	Family	No
Enclave at Mira Lagos II	Grand Prairie	TX	75054	112	North Texas	Family	No
Enclave at Parkview	Fort Worth	TX	76179	144	North Texas	Family	Yes
Encore at Buckingham	Richardson	TX	75081	242	North Texas	Seniors	No
Estates at Shiloh (224 new construction)	Dallas	TX	75228	264	North Texas	Seniors	Yes
Fifty Oaks	Rockport	TX	78382	50	South Texas	Family	Yes
Fish Pond at Cuero	Cuero	TX	77954	48	South Texas	Seniors	Yes
Fish Pond at Portland	Portland	TX	78374	60	South Texas	Seniors	Yes
Flats at Shadow Glen	Manor	TX	78653	248	North Texas	Family	No
Forest Park Apartments	Austin	TX	78753	228	Central Texas	Family	Yes
Galbraith, The	Dallas	TX	75201	217	North Texas	Family	Yes
Garland Estates	Garland	TX	75042	40	North Texas	Seniors	No
Glades of Gregory	Gregory	TX	78359	72	South Texas	Family	Yes
Golden Acres Retirement Center	Paris	TX	75460	50	East Texas	Seniors	No
Golden Trails	West	TX	76691	45	West Texas	Seniors	Yes
Gran Cielo	Rio Grande City	TX	78582	80	South Texas	Family	Yes
Grand Reserve Seniors, The - McKinney	McKinney	TX	75069	180	North Texas	Seniors	Yes
Grand Reserve Seniors, The - Temple	Temple	TX	46504	102	Central Texas	Seniors	Yes
Grand Reserve Seniors, The - Waxahachie	Waxahachie	TX	75165	80	North Texas	Seniors	Yes
Grand Texas Seniors, The - McKinney	McKinney	TX	75069	100	North Texas	Seniors	Yes
Green Briar Village I	Wichita Falls	TX	76305	76	North Texas	Family	Yes
Greenbriar Village II	Wichita Falls	TX	76305	36	North Texas	Family	Yes
Greens on Turtle Creek, The	Port Arthur	TX	77642	84	East Texas	Seniors	Yes

Property	City	State	Zip	Units	Region	Description	AFFORDABLE UNITS
Guadalupe Villas Seniors (new construction)	Lubbock	TX	79401	128	West Texas	Seniors	Yes
Gulfway Manor	Corpus Christi	TX	78412	151	South Texas	Family	Yes
Hacienda Del Sol	Dallas	TX	75217	55	North Texas	Family	Yes
Hampton Villages	Pampa	TX	79065	76	Panhandle	Family	Yes
Heritage Estates at Huntsville (new construction)	Huntsville	TX	77320	48	Upper Gulf Coast	Seniors	Yes
Heritage Estates at Owen Tech	Austin	TX	78728	174	Central Texas	Seniors	Yes
Heritage Heights at Big Springs	Big Spring	TX	79720	66	West Texas	Seniors	Yes
Heritage Tower Apartments	Longview	TX	75601	36	East Texas	Family	Yes
Hickory Trails	Longview	TX	75601	45	East Texas	Seniors	Yes
Highland Villas	Bryan	TX	77802	180	Central Texas	Seniors	Yes
Hills at Leander	Leander	TX	78641	228	Central Texas	Seniors	Yes
Homes of Mountain Creek, The	Grand Prairie	TX	75051	200	North Texas	Family	Yes
Hunter's Glen	San Antonio	TX	78211	144	South Texas	Family	Yes
Huntington at Kemah	Kemah	TX	77565	148	Upper Gulf Coast	Seniors	Yes
Huntington at Missouri City	Missouri City	TX	77459	120	Upper Gulf Coast	Seniors	Yes
Huntington at Paseo de la Resaca	Brownsville	TX	78526	132	South Texas	Seniors	Yes
Huntington at Sienna	Missouri City	TX	77459	132	Upper Gulf Coast	Seniors	Yes
Huntington at Sienna Ranch	Missouri City	TX	77459	149	Upper Gulf Coast	Seniors	Yes
Huntington Beaumont (fka Gardens at Sierra)	Beaumont	TX	77708	120	East Texas	Seniors	Yes
Huntington College Station (new construction)	College Station	TX	77845	120	Central Texas	Seniors	Yes
Huntington Lake Jackson (fka Jackson Village)	Lake Jackson	TX	77566	96	South Texas	Seniors	Yes
Huntington Seniors at Buda (The)	Buda	TX	78610	120	Central Texas	Seniors	Yes
Hutchins Gateway Apartments	Hutchins	TX	75141	336	North Texas	Family	Yes
Iris Place	Dallas	TX	75240	18	North Texas	Family	No
Jeffrey Square Apartments	Dallas	TX	75208	20	North Texas	Family	No
Kensington Place	Houston	TX	77034	216	Upper Gulf Coast	Family	Yes
Kings Court	San Antonio	TX	78212	32	South Texas	Seniors	No
Kings Crossings	Kingsville	TX	78363	120	South Texas	Family	Yes
La Villita Phase I	Brownsville	TX	78521	128	South Texas	Family	Yes
La Villita Phase II	Brownsville	TX	78521	80	South Texas	Family	Yes
Lake Jackson Manor	Lake Jackson	TX	77566	100	South Texas	Seniors	Yes
Lake Park Duplexes	Tyler	TX	75704	50	East Texas	Family	No
Lakeline Apartments	Leander	TX	78641	264	Central Texas	Family	No
Lakeview Pointe	Garland	TX	75043	132	North Texas	Family	Yes
Landing, The	Waco	TX	76705	160	Central Texas	Family	Yes
Las Misiones Apartments	Mission	TX	78527	118	South Texas	Family	No
LBJ Station	Dallas	TX	75243	249	North Texas	Family	No
Legacy Ranch @ Dessau East	Pflugerville	TX	78753	232	Central Texas	Seniors	Yes
Lindbergh Parc	Fort Worth	TX	76106	196	North Texas	Seniors	Yes
Live Oak Villas	George West	TX	78022	48	South Texas	Family	Yes
Lockhart Springs	Lockhart	TX	78644	48	Central Texas	Family	Yes
LULAC Village Park	Corpus Christi	TX	78416	152	South Texas	Family	Yes
Lyons Gardens	Austin	TX	78702	54	Central Texas	Seniors	No
Maeghan Pointe Apartments	Edcouch	TX	78538	80	South Texas	Family	Yes
Magnolia at Village Creek	Fort Worth	TX	76119	252	North Texas	Family	Yes

Property	City	State	Zip	Units	Region	Description	AFFORDABLE UNITS
Magnolia Place Senior Apts	Houston	TX	77033	144	Upper Gulf Coast	Seniors	Yes
Majestic Parc (fka on McKinney)	Denton	TX	76209	217	North Texas	Family	No
Major Crossing Apartments	Beaumont	TX	75428	96	East Texas	Family	No
Mansions at Hastings Green	Houston	TX	77065	230	Upper Gulf Coast	Family	Yes
Mansions at Hastings Green Senior	Houston	TX	77065	252	Upper Gulf Coast	Seniors	Yes
Marbella	Corpus Christi	TX	78413	783	South Texas	Family	No
Mark at Midlothian	Midlothian	TX	76065	236	North Texas	Family	No
Mark on Conquest	Waxahachie	TX	75165	140	North Texas	Family	No
Mark on Solon	Waxahachie	TX	75165	112	North Texas	Family	No
Martha's Vineyard Place	Dallas	TX	75235	100	North Texas	Family	Yes
McMullen Square	San Antonio	TX	78228	100	South Texas	Family	Yes
Meadows at Bentley Drive, The	San Antonio	TX	78218	208	South Texas	Family	Yes
MidPark Towers	Dallas	TX	75240	202	North Texas	Family	Yes
Mill Stone Apartments	Fort Worth	TX	76120	144	North Texas	Family	Yes
Mill Town Seniors	Silsbee	TX	77565	80	East Texas	Seniors	Yes
Miramonte	Stafford	TX	77471	124	South Texas	Family	Yes
Miramonte Single Living	Stafford	TX	77471	68	South Texas	Family	Yes
Moore Grocery Lofts	Tyler	TX	75702	88	East Texas	Family	Yes
Museum Reach Lofts (new construction)	San Antonio	TX	78215	94	South Texas	Family	Yes
Navigation Pointe	Corpus Christi	TX	78405	124	South Texas	Family	Yes
Oak Meadows Townhomes	Commerce	TX	75428	72	North Texas	Family	Yes
Oak Trails Apartments	San Angelo	TX	76903	48	West Texas	Family	Yes
Old Salem Village	Shreveport	LA	71129	200	Lousiana	Family	Yes
Orchards at Arlington Heights	Arlington	TX	76018	180	North Texas	Seniors	No
Orchards at Market Plaza	Plano	TX	75075	180	North Texas	Seniors	No
Overlook	Palestine	TX	75081	200	East Texas	Family	No
Paddock on Park Row	Arlington	TX	76010	350	North Texas	Family	Yes
Palisades of Inwood	Houston	TX	77088	127	Upper Gulf Coast	Seniors	Yes
Parc East Apartments	Mesquite	TX	75150	209	North Texas	Family	Yes
Parc West	Arlington	TX		112	North Texas	Family	Yes
Park Gardens North	Paris	TX	75462	100	East Texas	Family	No
Park Hill	San Marcos	TX	78666	168	Central Texas	Family	No
Park Village	Big Spring	TX	79720	76	West Texas	Family	Yes
Park, The	Corpus Christi	TX	78413	226	South Texas	Family	No
Parkstone Crossroads	Wichita Falls	TX	76301	112	North Texas	Family	Yes
Parkstone Senior Village I	Wichita Falls	TX	76310	140	North Texas	Seniors	Yes
Parkstone Senior Village II	Wichita Falls	TX	76310	64	North Texas	Seniors	Yes
Parkstone Senior Village III	Wichita Falls	TX	76310	40	North Texas	Seniors	No
Pioneer Crossing Burkburnett Seniors	Burkburnett	TX	76354	80	North Texas	Seniors	Yes
Pioneer Crossing Diboll (new construction)	Diboll	TX	75941	80	East Texas	Family	Yes
Pioneer Crossing Henrietta	Henrietta	TX	76365	49	North Texas	Family	Yes
Pioneer Crossing Kountze	Kountze	TX	77625	84		Family	Yes
Pioneer Crossing Lufkin Family	Lufkin	TX	75904	80	East Texas	Family	Yes
Pioneer Crossing Lufkin Seniors	Lufkin	TX	75904	80	East Texas	Seniors	Yes
Pioneer Crossing Mineral Wells	Mineral Wells	TX	76067	80	North Texas	Family	Yes

Property	City	State	Zip	Units	Region	Description	AFFORDABLE UNITS
Pioneer Crossing Sulphur Springs Seniors	Sulphur Springs	TX	75482	80	East Texas	Seniors	Yes
Post Oak - Edna, The	Edna	TX	77957	64	South Texas	Family	Yes
Preserve at Willow Park	Willow Park	TX	76087	152	North Texas	Seniors	No
Primrose Village (new construction)	Weslaco	TX	78599	242	South Texas	Family	Yes
Provision at Patriot Place Apartments	Hurst	TX	76053	90	North Texas	Family	Yes
Red Oaks Townhomes	Waco	TX	76706	80	Central Texas	Family	Yes
Regency Park Residences (Fka Rockhill)	McKinney	TX	75070	60	North Texas	Family	No
Reserve at Towne Crossing, The	Longview	TX	75605	216	East Texas	Family	No
Reserves at San Marcos	San Marcos	TX	78666	376	Central Texas	Family	Yes
Reserves at Springdale	Austin	TX	78723	292	Central Texas	Family	Yes
Residences on Stillhouse Road	Paris	TX	76460	76	East Texas	Family	Yes
River Pointe	San Angelo	TX	76903	204	West Texas	Family	Yes
Riverside Village	Rio Hondo	TX	78583	60	South Texas	Family	Yes
Riversquare	Corpus Christi	TX	78410	204	South Texas	Family	Yes
Riverwalk Townhomes	Stephenville	TX	76401	76	North Texas	Family	Yes
Rockwell Manor	Brownsville	TX	78521	126	South Texas	Family	Yes
Royal Gardens Mineral Wells	Mineral Wells	TX	76067	75	North Texas	Seniors	Yes
Royal Gardens Wichita Falls	Wichita Falls	TX	76310	49	North Texas	Family	Yes
Saddle Creek	Kyle	TX	78640	104	Central Texas	Family	Yes
Sage Brush Village	Odessa	TX	79763	112	West Texas	Family	Yes
Santa Rita Senior Village	Midland	TX	79701	136	West Texas	Seniors	Yes
Sedona Springs Villas	Odessa	TX	79764	100	West Texas	Family	Yes
Silver Springs Apartments	Austin	TX	78753	360	Central Texas	Family	Yes
Silver Spur Apartments (New construction)	Palmview	TX	78572	120	South Texas	Family	Yes
Somerset Lofts (new construction)	Houston	TX	77008	120	Upper Gulf Coast	Family	Yes
Southwest Pines	Tyler	TX	75701	248	East Texas	Family	Yes
Spicewood Canyon	Roswell	NM	88203	60	Southeast New Mexico	Family	Yes
Springfield Manor	Kirby	TX	78219	130	South Texas	Family	Yes
St. George's Court	Austin	TX	78752	60	Central Texas	Seniors	No
Stablewood Farms	San Antonio	TX	78227	252	South Texas	Family	No
Sterling Springs Villas	Midland	TX	79706	120	West Texas	Family	Yes
Stone Hearst Apts	Beaumont	TX	77703	104	East Texas	Family	Yes
Stone Hearst Seniors	Beaumont	TX	77703	36	East Texas	Seniors	Yes
Stonebridge of Plainview	Plainview	TX	79072	80	West Texas	Family	Yes
Sundance Meadows Apartments	Brownsville	TX	78526	132	South Texas	Family	Yes
Sunflower Estates	La Feria	TX	78559	80	South Texas	Family	Yes
Sunquest	Primera	TX	78552	128	South Texas	Family	Yes
Sunray Community	Richardson	TX	75081	50	North Texas	Seniors	No
Sunrise Terrace	La Feria	TX	78559	70	South Texas	Family	Yes
Sycamore Pointe Apts.	Fort Worth	TX	76134	168	North Texas	Family	Yes
Thompson Place	San Antonio	TX	78226	128	South Texas	Family	No
Timber Creek at Sienna Trails	Beaumont	TX	77708	36	East Texas	Family	Yes
Town Parc at Tyler Apartments	Tyler	TX	75230	96	East Texas	Family	Yes
Tree Apts, The	Mission	TX	78501	152	South Texas	Family	No
Treepoint Meadows	Amarillo	TX	79109	432	Panhandle	Family	No

Property	City	State	Zip	Units	Region	Description	AFFORDABLE UNITS
Trinity Loft	Dallas	TX	75207	101	North Texas	Family	No
Tuscany Court Townhomes	Hondo	TX	78861	76	South Texas	Family	Yes
Tuscany Park at Buda	Buda	TX	78610	176	Central Texas	Family	Yes
Twin Oaks	Mission	TX	78572	104	South Texas	Family	Yes
Urban Oaks	Austin	TX	78745	194	Central Texas	Family	Yes
Urban Villas	Austin	TX		90	Central Texas	Family	No
Villages at Snyder	Snyder	TX	79550	80	West Texas	Family	Yes
Villages of Huntsville	Huntsville	TX	77320	76	Upper Gulf Coast	Family	Yes
Villages of Huntsville Senior	Huntsville	TX	77320	36	Upper Gulf Coast	Seniors	Yes
Villas at Arlington	Arlington	TX	76010	396	North Texas	Family	No
Villas at Boston Heights	Benbrook	TX	76116	144	North Texas	Family	Yes
Villas of Giddings	Giddings	TX	78942	36	Central Texas	Family	Yes
Villas on Calloway Creek	Hurst	TX	76053	135	North Texas	Seniors	Yes
Villas on Raiford	Carrollton	TX	75007	180	North Texas	Seniors	Yes
Vineyard on Lancaster	Ft Worth	TX	76102	104	North Texas	Family	Yes
Vista Bella	Vista Lago	TX	78745	72	North Texas	Family	Yes
Walnut Creek Apartments	Austin	TX	78723	98	Central Texas	Family	Yes
West Oaks Village	Houston	TX	77082	232	Upper Gulf Coast	Seniors	Yes
West Ridge Villas	McKinney	TX	75070	132	North Texas	Family	Yes
Western Hills	San Antonio	TX	78227	148	South Texas	Family	Yes
Willow Bend Villas	Hobbs	NM	88204	60	Southeast New Mexico	Family	Yes
Wood River	Corpus Christi	TX	78410	200	South Texas	Family	No
Woodland Ridge	San Antonio	TX	78240	152	South Texas	Family	Yes
Works at Pleasant Valley II, The	Austin	TX	78702	29	Central Texas	Family	Yes
Works at Pleasant Valley, The	Austin	TX	78702	45	Central Texas	Family	Yes
Wurzbach Manor	San Antonio	TX	78240	161	South Texas	Family	Yes
Zion Village	Houston	TX	77004	50	Upper Gulf Coast	Family	Yes

HUD Program/Financing	TOTAL UNITS		31,395	HAP UNITS		1,330
	TOTAL PROPERTIES		248	HAP PROPERTIES		15
	SENIOR UNITS		7,885	811 UNITS		183
	SENIOR PROPERTIES		71	811 PROPERTIES		18
	LIHTC UNITS		20,521	PRAC UNITS		361
New Construction/Lease Up	LIHTC PROPERTIES		186	PRAC PROPERTY		10
	AFFORDABLE UNITS		21,133	HUD FINANCED UNITS		9,975
	AFFORDABLE PROPERTIES		191	HUD FINANCED PROPERTI		65



Anna Melson is Vice President in Dallas, Texas. Anna oversees the operations and activities of six regional supervisors and managers, a total of almost 7,000 apartment units. The portfolio contains affordable housing, conventional and senior housing assets. As Vice President, Ms. Melson is responsible for the operational, contractual and regulatory performance of the assets. In her role as investment manager, she maintains regular and informative contact with asset investors and clients. Anna attended Arizona State University, studying business administration and management.

In 1989, she began her property management career in Dallas with a large owner/developer of USDA Farmers Home Administration Section 515 properties located throughout Texas and New Mexico. A merger brought her to M-DC Group, Inc. (Alpha Management) as a Regional Property Supervisor and in 2000 she assumed the role of Senior Regional Property Supervisor at Alpha Barnes. Anna has operated USDA properties, HUD-financed properties and Section 8 project-based assets. Ms. Melson has extensive expertise in properties utilizing the Low-Income Housing Tax Credit (LIHTC) as well as HOME and Bond programs. Over the years, Anna has leased up over forty-five (45) LIHTC properties. As a proven leader in Alpha Barnes, Anna was promoted to Vice President in April 2018.

Anna maintains her credentials with regular participation in training programs offered by the Texas Department of Housing and Community Affairs as well as the Texas Apartment Association. Ms. Melson is a Certified Apartment Portfolio Supervisor (CAPS), Housing Credit Certified Professional (HCCP) and a Certified Occupancy Specialist (COS).



Cathy Johnson is Vice President at Alpha Barnes Real Estate Services, LLC in Dallas, Texas. Cathy oversees the operations and activities of six regional supervisors and managers, a total of over 8,000 apartment units. The portfolio contains affordable housing, conventional and senior housing assets. As Vice President, Ms. Johnson is responsible for the operational, contractual and regulatory performance of the assets. In her role as investment manager, she maintains regular and informative contact with asset investors and clients.

Cathy joined the apartment industry as a Leasing Agent for Hall Management in 1987. Through acquisition of a management contract, she joined Alpha Management in 1991 as an Assistant Manager. During the next 25 years, Ms. Johnson earned a reputation as a compliance specialist in the Low-Income Housing Tax Credit (LIHTC) program in terms of initial lease-ups, ongoing operations and compliance, and the clean-up of properties that have not maintained high compliance standards. She also has extensive experience in resolving occupancy issues at affordable and conventional apartments and is known and respected by clients and syndicators throughout Texas. As a proven leader in Alpha Barnes, Cathy was promoted to Vice President in April 2018.

Ms. Johnson is a Certified Apartment Portfolio Supervisor (CAPS), a Housing Credit Certified Professional (HCCP) and a National Apartment Leasing Professional (NALP).



Connie Quillen is Vice President in Austin, Texas. Connie oversees the operations and activities of six regional supervisors and managers, a total of 6,000 apartment units. The portfolio contains affordable housing, conventional and senior housing assets. As Vice President, Ms. Quillen is responsible for the operational, contractual and regulatory performance of the assets. In her role as investment manager, she maintains regular and informative contact with asset investors and clients.

Ms. Quillen holds a degree in Business Administration from Central Texas College. Connie began her career in property management in 1991 as a property manager. She worked for the Travis County Housing Authority with responsibility for Public Housing and then as its Director of Assisted Housing. Connie joined Alpha Barnes in 2001 and was promoted to Regional Supervisor in 2003. After rising to the role of Senior Regional Supervisor, Connie was promoted to Vice President in December 2018. Connie's experience with Public Housing and Section 8 makes her invaluable to clients with difficult to manage properties with high levels of rental assistance. She has been responsible for the operations of literally dozens of Low-Income Housing Tax Credit (LIHTC) and Project Based Section 8 properties across Texas over the past 15 years.

Ms. Quillen is a licensed Texas real estate broker. She is a Housing Credit Certified Professional (HCCP), a Certified Apartment Portfolio Supervisor (CAPS), a Public Housing Manager (PHM) and a Section 8 Housing Manager (SHM).



Debbie Wiatrek is Vice President in San Antonio, Texas. Debbie is Vice President at Alpha Barnes Real Estate Services, LLC in San Antonio, Texas. Debbie oversees the operations and activities of four regional supervisors and their portfolio managers. The portfolio contains affordable housing, conventional Low-Income Housing Tax (LIHTC) housing, Section 8, Senior, conventional, value-add rehabs and new construction assets. As Vice President, Ms. Wiatrek is responsible for the operational, contractual and regulatory performance of the assets. In her role as investment manager, she maintains regular and informative contact with asset investors and clients.

Ms. Wiatrek began her industry career in 1996 as a Regional Manager and has grown in those roles since then, working at regional and nationally recognized organizations. She has supervised over 8000 units in her past position and 9 Regional Managers and included a variety of Texas markets. She has been involved with design construction, marketing and lease up and staff recruitment. In addition, she is a certified Public Housing Specialist. Ms. Wiatrek joined Alpha Barnes in May 2019 from Capstone where she was Vice President of Operations. In September 2019, Debbie was promoted to Vice President.

She is a member of the Texas Apartment Association Board of Directors and the National Apartment Association Board of Directors. She is the Past President of the San Antonio Apartment Association and has served on all committees within that Association. Active with Government Relations, Ms. Wiatrek has lobbied in Washington, DC on behalf of apartment owners and managers. Debbie has successfully raised thousands of dollars for the 100 Club, which benefits the families of fallen fire fighters and police officers.



Trista is Controller at Alpha Barnes. As a Corporate Department Head, Trista provides critical support to the daily site and regional property operation. At Alpha Barnes, our clients meet their financial goals when we support the needs of our customers at the point of service. Administrative productivity and efficiency are essential. Trista manages corporate accounting for all Alpha Barnes offices, including internal employee reimbursements and cost allocations where appropriate. Ms. Browning maximizes technology to accomplish and meet deadlines in a timely and accurate manner.

Ms. Browning received her Associates degree and attended both the University of North Texas and the University of Texas at Dallas, studying business and accounting. After several year managing commercial and medical offices, Trista joined Alpha Barnes in 1997. Initially responsible for the property accounting for all assets, she also managed software migrations and new property integrations. As the client services division grew, in 2009 Ms. Browning focused her efforts in the role of Controller. She continues to inform and provide support to company auditors, ensuring accuracy and timeliness of corporate reporting and works collaboratively with client accounting services.

Trista is an active member of the Institute of Finance and Management.



Patrick King is the Director of Client Accounting. As a Corporate Department Head, Patrick provides critical support to the daily site and regional property operation. At Alpha Barnes, our clients meet their financial goals when we support the needs of our customers at the point of service. Administrative productivity and efficiency are essential. Patrick maximizes accounting technology to reduce costs and create greater efficiencies for the company and its managed assets. Patrick's team of five Client Accounting Specialists ensures that financial reporting is accurate, timely and meets the unique needs of clients and their accountants, including property cash management and partnership distributions.

Patrick earned a Bachelor's degree from Southern Methodist University after starting his education at the University of North Texas. Beginning in 1982, Mr. King worked in financial management capacities for several firms, including environmental, import/export and retail companies. At those firms, Patrick honed his unique ability to support financial acumen with research and operational impacts. He joined Alpha Barnes in 2007. By 2009, Patrick had assumed the role of Director of Client Accounting, where he continues to ensure strong client relationship, negotiate owner funding protocols and provide leadership in deploying new efficiencies in processing and reporting.

Mr. King regularly consults with top audit firms to ensure legal and regulatory compliance needs are met.



Terri Turner is Director of Accounts Payable. As a Corporate Department Head, Terri provides critical support to the daily site and regional property operation. At Alpha Barnes, our clients meet their financial goals when we support the needs of our customers at the point of service. Administrative productivity and efficiency are essential. Terri ensures property and regional payables and receivables are posted accurately and timely. Terri directs a team of four accounts payable specialists who each support a portfolio of properties based on client needs. Her team is trained to interact positively with supplier partners, residents and clients regarding payables at their assets.

Terri studied at Southern Arkansas University Tech. The first five years of Terri's work history were in bookkeeping and office administration in a retail business. Her real estate management career started in 1993 in the role as Manager at both conventional and tax credit properties. Her experience in the property offices taught her the value of the payable's relationship with the owner. She joined Alpha Barnes in 1999 as an Assistant Manager and was responsible for receivables and payables processing on site. Upon her arrival, she instituted system checks and balances and portfolio assignments to heighten efficiencies.

In 2007, the Terri was promoted to the corporate office in the Accounts Payable Department. She quickly assumed a leadership role and now serves at the Director of Accounts Payable.



Lori Erbst is Director of Compliance. As a Corporate Department Head, Lori provides critical support to the daily site and regional property operation. At Alpha Barnes, our clients meet their financial goals when we support the needs of our customers at the point of service. Administrative productivity and efficiency are essential. Lori specifically directs the administration of the Alpha Barnes compliance department, overseeing 13 specialists who ensure the regulatory and contractual obligations are met at all levels with local and state housing and support agencies. Ongoing training and support of site personnel is a key performance indicator. First year files, tenant income certifications and renewals and audit preparation and findings corrections are managed by Ms. Erbst.

Lori attended Dallas County Community College and began her career in property management in Dallas in 1996 with an owner/developer of Low-Income Housing Tax Credit (LIHTC) properties. In 2001, she joined Alpha Barnes as a compliance specialist and was promoted to Director of Compliance in 2007. Over time, the department grew to a manager and six specialists. Lori's extensive knowledge and experience with Housing Tax Credit, HOME, BOND, Housing Trust Fund and the Affordable Housing Disposition program make her invaluable to our clients and staff members. Additionally, through strong business relationships, Lori is able to work closely with all state agencies and maintain a respected partnership.

Lori participates regularly in training offered by the Texas Department of Housing and Community Affairs. Ms. Erbst is a Certified Credit Compliance Professional (C3P), a Housing Credit Certified Professional (HCCP) and a National Compliance Professional (NCP).



Rebecca Alonzo is the Director of Client Services. In this role, Ms. Alonzo is responsible for the strategic support of Alpha Barnes clients and investors, offering extensive asset analysis and reporting, strategic recommendations for value growth and new and additional business model development. She serves as an essential liaison between clients, suppliers and the Alpha Barnes' Executive, Business Development and Accounting teams. The firm continues to grow both its statistical footprint and status as a leading operator of affordable housing and a proven asset value-enhancer.

Ms. Alonzo holds a Bachelor of Arts degree in Sociology from The University of Texas, Arlington. She began her career in property management in 1998. Her Property Management involvement includes on-site operations, project management, business development, and multi-family housing marketplace. With a specialty in contract administration, Rebecca is able to oversee the smooth transition of property acquisitions, due diligences and take over management, including working closely with HUD, TDHCA, and the local Housing Authorities. Ms. Alonzo joined Alpha Barnes in 2017 and has intentionally grown her knowledge and experience with HUD and Low-Income Housing Tax Credit (LIHTC) requirements, making her invaluable to clients and staff members.

Ms. Alonzo is a Certified Apartment Portfolio Supervisor (CAPS) and a Housing Credit Certified Professional (HCCP).



Doug Tyrone is the Director of Information Technology. As a Corporate Department Head, Doug provides critical support to the daily site and regional property operation. At Alpha Barnes, our clients meet their financial goals when we support the needs of our customers at the point of service. Administrative productivity and efficiency are essential. Doug maximizes technology to reduce costs and create greater efficiencies for the company and its managed assets. This includes meeting property and regional office website, email and hardware needs.

Doug studied computer technology at Eastfield College in Dallas in the early 2000's. During this time, he provided call center support for multiple Internet companies and their customers. After a brief tenure at Verizon, Doug began working in merchandising for Home Depot, quickly moving into an IT Asset Manager role. In 2008, Doug served as a field system engineer for Tec Watch, providing on-site hardware and software issue solutions. He joined Alpha Barnes in 2011 and currently directs all IT operations for the Dallas office. His background in multi-site technical service and training allows consistent and uninterrupted communication with Alpha Barnes property, regional and corporate offices.



Leighann Taylor is Site Support Training Coordinator. As a Corporate Department Head, Leigh Anne provides critical support to the daily site and regional property operation. At Alpha Barnes, our clients meet their financial goals when we support the needs of our customers at the point of service. Administrative productivity and efficiency are essential. Leigh Anne manages all training and support for the Alpha Barnes properties using the RealPage OneSite property management software. Her responsibilities include property set-ups, software corrections, management of automated rent payments and new resident application screening. In addition, she supports the needs of the Supervisors and Accounting team.

Ms. Taylor studied medicine for several years while attending Tarrant County Junior College, but transitioned to property management when she began her career as a leasing consultant 2004. She subsequently held the manager position at two companies. Because of her expertise in the OneSite property management software, she was a troubleshooter for new properties and staff. She joined Alpha Barnes in 2013 with a specific mandate to increase occupancy and revenue at a troubled asset. Once the property was stabilized, she began to troubleshoot and provide software support for other Alpha Barnes properties. Ms. Taylor was promoted to Site Support Training Coordinator in 2018.

2.9 Right to Stay/Return Policy Implementation

Legacy Impact Housing will follow the affordable housing preference policy goals and guidelines presented in the November 6, 2019 memorandum to the Austin City Council from Rosie Trulove, Director, Neighborhood Housing and Community Development Department. The critical initial step is to identify persons that qualify for the generational ties, household size, or disability preferences. Extensive marketing of the new development will be done during construction so that a pool of eligible preference persons can be in place at least thirty days prior to the property manager qualifying individuals under the LIHTC program eligibility criteria. Available rental housing will be offered first to qualified persons on the preference list and will remain available for a period of thirty days before persons not in the preference groups are offered the available unit. A wait list applicant response time limit will be necessary to allow offering the next wait list applicant the available housing. The property will be under a partnership operating agreement with the tax credit investor that establishes a deadline by which the property must be fully leased and achieve rental stabilization of 90% occupancy for 90 consecutive days. If the stabilization timeline is not met, the property is subject to a detrimental financial penalty.

The property management company will be responsible for the affirmative marketing campaign to historically underserved groups and is expected to confer with the AHFC on lessons learned from the Preference Policy Pilot Program, the University of Texas for data from the Uprooted report, and the E MLK Combined Neighborhood Plan Contact Team and sub-neighborhood associations. If needed, additional preferred person research will be conducted by third party consultants including offering an internship position(s) to neighborhood high school or college students. The property manager will encourage the Neighborhood Contact Team to hold community-wide resident meetings at which current residents could identify those persons that have left or those that face the pressure of gentrification and want to stay in the community.

During the apartment initial lease-up period, an equal number of income restricted accessible units to persons on the disability preference waitlist will be reserved and an equal number of income restricted housing units to persons on the household size preference wait list will be reserved prior to releasing the units to non-preference waitlist housing applicants. To meet the demand created by generational ties and displacement priority wait list applicants, 40%

of the available affordable housing units will be reserved as described previously.

These same preferences will be applicable to each home sale. The AHFC Pilot program A, B, C, D priority ranking system will be incorporated into the wait list procedure to ensure those with the greatest need are given the highest priority access to the affordable housing. AHFC may elect to be directly involved in the affirmative marketing, wait list maintenance, and ownership application review given the proposed apartment ownership and home sale revenue sharing positions being offered to AHFC.

2.10 Supplemental Development Programs

Development of the Tannehill Lane site will be financed utilizing equity provided by the 4% Low Income Housing Tax Credit program, coupled with bonds from the Texas Private Activity Bond program which will cash collateralize an FHA 221(d)(4) 40-year mortgage. The to be formed partnership that will own the project improvements will enter into a seventy-five-year land lease with the Austin Housing Finance Corporation as land owner. The S.M.A.R.T. Greenfield Multi-Family Density Bonus will be incorporated by pursuing a land use zoning change to MF-2, multifamily residence low density, obtaining certification as a S.M.A.R.T. Housing Program development and utilizing the permitted MF-6 site development regulations; however, the proposed maximum building height is limited to four-stories, or 48 feet. The Affordability Unlocked development incentive program will be used to reduce the required number of on-site vehicle parking spaces.

2.11 Land Acquisition

The proposed apartment development financial structure anticipates making an up-front one-time land lease payment to the AHFC in the amount of \$1,980,000; more than the reported AHFC \$1,960,000 land cost basis. Additionally, a one-time up-front land lease payment of \$980,000 will be paid for the for-sale home land area. **The AHFC will receive \$1 million more for the land than its purchase price.** To reduce the property tax burden on the home owners we propose the Community Land Trust be given title to the land for the for-sale home structures. After receiving the land lease payment, AHFC would deed the single family lot land area to the Community Land Trust.

2.12 AHFC Partnership Proposal

Providing a financially feasible rental affordable housing community to persons with income in the 30% AMI to 70% AMI range requires maximizing the mortgage loan proceeds by obtaining a property tax exemption. The AHFC has been granted the absolute right to all tax exemptions through the Texas Local Government Code. Therefore, the AHFC will retain title of the Altitude East apartment site lot and lease it back to the apartment owner partnership. AHFC will convey the for-sale land area lot to the Community Land Trust which will lease it back to each home owner. The AHFC will not have an ownership interest in the for-sale home structures but will be given an ownership interest in the apartment improvements. The apartment ownership interest will entitle the AHFC to receive 30% of the apartment developer fee and deferred developer fee as well as 50% of the apartment operating cash flow. The AHFC is also being offered 30% of the \$737,000 net home sale revenue paid when Legacy is paid at each home closing. Revenue to be received by AHFC is projected to be:

Apartment Development

Paid Developer Fee	\$1,053,053
Deferred Developer Fee	\$1,018,371
Cash Flow (15 years)	\$1,246,274
Land Lease Payment	<u>\$1,980,000</u>
Total Revenue	\$5,297,698

Home Development

Land Lease Payment	\$980,000
Net Sales Revenue	<u>\$221,100</u>
	\$1,201,100

Total AHFC Revenue \$6,498,798

In addition, a right of first refusal to purchase the Legacy Impact Housing Managing Member ownership interest in year 15 of the property tax credit compliance period, or earlier as mutually agreed to and permitted by the tax credit investor partner and mortgage lender, will be granted to the AHFC.

Legacy Impact Housing will create a home-buyer down payment assistance fund in the amount of \$220,000 or \$5,000/home on average. The funds will be made available to persons based on their

demonstrated financial need on a first come, first served basis. The down payment assistance funding will be administered by HomeBase.

2.13 City of Austin Gap Financing

The Legacy Impact Housing proposed financial structure for the apartment and home construction programs **will NOT require any City of Austin Development Assistance gap financing.**

3.0 DEVELOPMENT TEAM

3.1 Organizational Chart

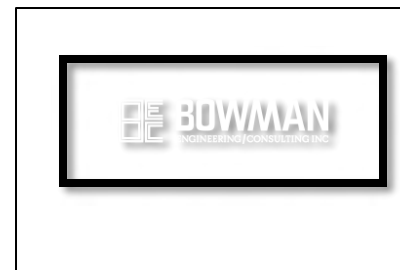
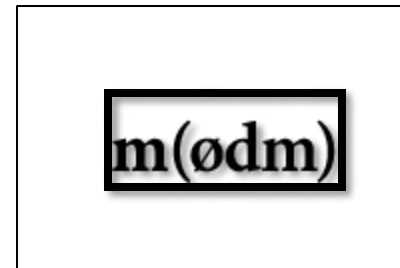
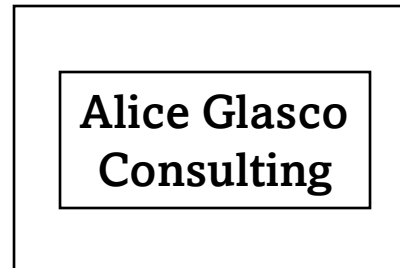
The prime firm and development team sub-consultants are presented on the following organization chart. Included as sub-consultants, Ledgestone Development Group, LLC, Legacy MCS, Legacy DCS, and Brewer Design Studio are under common ownership of Carrie Brewer and Cass Brewer and are related entities to Legacy Impact Housing.



PRODUCERS



CONSULTANTS



3.2 Developer Qualifications

An exceptionally experienced group of professionals have been assembled to design and construct the Altitude East housing community, obtain the needed City of Austin development approvals, structure the financing, acquire approvals for the 4% housing tax credit and private activity bonds, structure the owner partnership, and manage the apartment property. Legacy Impact Housing draws on the strength of its staff having decades of land development and affordable housing practice. Collectively, the Legacy Impact Housing prime firm and its affiliated Producers possess 48 years of affordable housing development.

Cass Brewer, President/CEO – A born entrepreneur, he has been launching and managing businesses since age 13. He has worked for a Fortune 100 corporation in its development divisions, been Vice President of the Texas Division of Centex Destination Properties, and managed projects for C.F. Jordan, Inc., a leading developer of multifamily housing. Brewer has a long history in renovations, home building and multifamily condominium construction giving him the dual advantage of not only knowing the most efficient means of completing a project, but also being able to provide thoughtful, personal service that is so often missing in this industry. He is a Certified Energy Star Builder committed to the concept of high quality green building.

Carrie Brewer, Owner, Creative Director – Carrie's strong commitment to design excellence characterizes all her firms' work. A "Top Woman-Owned Business" leader in the Austin area, Brewer began her professional career as an administrative assistant with GRW Studios, a real estate investment firm that celebrated restoring buildings, including entire streets of small towns. In this role, she had the opportunity to learn under the leadership's extraordinary vision for beautification. After college, Carrie joined Austin Ventures, a leading venture investment firm instrumental in launching a variety of entrepreneurial ventures. Her experience in researching and analyzing the potential of several business types provides a broad understanding of the requirements for success.

Craig Alter, Managing Director – Craig contributes his non-profit, for-profit, and public organizations' planning, organizational structuring, financing, and managing construction of affordable housing and tax credit housing communities to Legacy Impact Housing. While he was the Housing Authority of Travis County

Executive Director he led its instrumentality, Strategic Housing Finance Corporation, in the formation of public-private partnerships to develop affordable housing with private activity bonds issued by Strategic Housing Finance Corporation and accessing the 4% tax credit program. Additionally, his front-end responsibilities for more than 4,900 other affordable apartment homes included land acquisition, consultant contracting and management, project design, securing project entitlements, preparing and processing tax credit applications, structuring the development financing, attracting financial partners, and closing the project financing and land acquisition. He also acted as the owner's representative during construction with responsibilities including approving monthly construction draw requests, construction quality control, change order review and approval, and final construction completion acceptance on behalf of the owner. In recognition of his proven tax credit development experience, the Texas Department of Housing and Community Affairs issued an "experience certificate" (attached to his resume) allowing him to participate as an applicant in the Texas Low Income Housing Tax Credit program.

Jack Johannesmeyer, Chief Financial Officer – A Florida native, Jack earned Bachelors and Master's Degrees in Accounting from the University of Florida, and holds both an MBA and CPA. He has worked in Big 4 Public Accounting, for 3 Fortune 500 companies, and 2 of the largest public homebuilders in the country. Prior to joining Legacy, he was the CFO for 7 years for an \$850 million publicly traded HVAC distributor. Jack brings extensive experience in financial modeling and deal analysis, as well as a strong attention to internal controls, cash flow management, and safeguarding of assets. Jack's addition strengthened Legacy's fiduciary experience, acumen, and discipline needed to grow the company to the next level for all our stakeholders.

Victoria Pitts, V.P. of Finance – Please review Victoria's full resume included on the following pages.

- **Developer Affiliated Producers**

**Ledgestone Development Group, LLC –
Expert residential development company.
Innovative masters of lifestyle.**

As dedicated stewards of land entrusted to Ledgestone Development Group, LLC, every new luxury master-planned community is uniquely approached as an extraordinary opportunity to change the lives of its future residents by offering high-quality, energy-efficient, and sustainable developments. Ledgestone brings an unparalleled level of detail to every community, including land acquisition, due diligence, engineering and architectural design, entitlement, underwriting, construction, and delivery. Our superior suite of residential development services successfully navigates all variables involved for a seamless transition that begins with respectfully cultivating the land and ends with keys in hand for an upscale homeowner lifestyle.

Legacy Development and Construction Services (DCS) – As award-winning green builders, we are proud that Legacy is considered industry leaders in sustainable construction and *innovative peak performance home* design. From constructing homes for optimal energy performance and increased water efficiency to sourcing local materials, homes cater to buyers looking for a healthier lifestyle. Our formula for success combines trust, transparency, expert knowledge, strong business and communication processes. At Legacy, we start every day with a passion to serve and bring innovative solutions to our future home owners. Our team invests in ongoing education to ensure we're always maximizing quality, value and technology for our clients. Our passion for building homes and cultivating raving fans allows us to build your future Legacy.

Legacy Multifamily Construction Services (MCS) – Legacy MCS is a family-owned business dedicated to delivering best in class innovative products in residential construction. As part of a family of companies, we have the financial backing and talented professionals that ensure we can take on any project. Together, we are united in the goal to provide peace of mind by delivering projects ahead of schedule and innovation that can't be matched by our competition. We are committed to offering high-quality, long-lasting solutions for commercial, multi-family, apartments, townhomes, student living,

affordable housing, senior living, mixed-use condominium properties.

- **Developer Sub-consultants**

Brewer Design Studio – Strategic, passionate and creative with an eye for form and function, Brewer Design Studio is an award-winning boutique design firm led by Austin's "Top Woman-Owned Business" Owner, Carrie Brewer. The BDS team of experienced professionals offer a vast array of innovative design solutions to clients developing residential, commercial, hospitality, and community projects throughout the state of Texas. From single- and multi-family housing to commercial complexes and luxury hotels, BDS can take any project from concept to reality."

Mark Odom Studio – Mark Odom Studio believes that every project generates its own set of specifics and as such, our approach as an office must always be free of preconceived ideas, allowing every design response to reinforce specific client personality, site, materials, movement, and engagement. Our strength has arisen from our ability to generate solutions that aren't necessarily the product of "the way it's always been done", but instead creatively engaging client needs, site and context. We seek out clients willing to place a value on story and exploration, beyond the standard, and we see the "Altitude East" as an opportunity to develop solutions unique to our local, East Austin, built environment.

Bowman Engineering – "Success doesn't just happen. It's the result of thoughtful planning and focused action. At Bowman, we work with intention to deliver on-demand technical genius and industry leading talent that, when combined, produces innovative and solution-driven results. Our clients benefit from a balance of deep national resources often associated with large firms, and the flexibility and quick response associated with smaller boutique firms, to effectively navigate through intricate approval processes. Bowman is a trusted, multi-faceted consulting firm offering a broad range of infrastructure, environmental management, energy and real estate solutions to both public and private clients across the country."

True Casa Consulting – "Jennifer Hicks has over 20 years of affordable housing development and finance experience working for Foundation Communities. 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.”

Cynthia Bast, Locke Lord – “Cynthia Bast is nationally recognized as a preeminent lawyer in the area of affordable housing and community development finance and leads the Firm’s Affordable Housing Section. Cynthia has been named in The Best Lawyers in America for Real Estate Law and in Chambers USA for 2016-2021.” She is highly sought by developers throughout Texas for her adept tax credit program understanding and Texas Department of Housing and Community Affairs professional relationships.

Alice Glasco Consulting – “During her (21 year) tenure with the City of Austin, Ms. Glasco directed two departments, namely the Neighborhood Planning and Zoning Department, where she was in charge of planning neighborhoods; and the Development Review and Inspection Department, where she directed all aspects of land development that included zoning, subdivision of land, site plan review, building permits, building inspections, and code enforcement.”

Alpha Barnes Real Estate Services – “The primary business of Alpha Barnes Real Estate Services is the management of (approximately 30,000) residential, rental real estate for private owners, non-profit entities, financial institutions and government agencies. In this role, Alpha Barnes Real Estate Services provides comprehensive management services that cover all phases of property operations including management, leasing, maintenance, financial management and owner and government compliance and reporting. Presently, the firm manages properties in all areas of Texas and operates from its main office in Dallas with regional offices in San Antonio and Austin, as well as staff based in Texarkana, Houston, and Corpus Christi.”

HomeBase – “HomeBase has been working in the affordable housing space in Austin since 2005. Since being acquired by Austin Habitat for Humanity (AHFH) in 2011, HomeBase has served as the in-house affordable housing consulting firm for AHFH. This allow HomeBase to leverage Habitat’s decades of experience in affordable housing, HUD-certified financial counseling, long-term affordability, financing, and sales to assist in the planning, creation, preservation, and resale of affordable homes throughout Austin.”

Please refer to the following Legacy Impact Housing, affiliated producers', and all sub-consultants' statements of experience for greater professional experience detail.



LEGACY

IMPACT HOUSING

TOGETHER CHANGING LIVES

Transforming communities from land into
places where all people can thrive.

<http://legacyimpacthousing.com> | info@legacyimpactgroup.com

**Transforming land into
communities, leading people
to opportunity.**



Legacy IMPACT Housing is dedicated to delivering exceptional living opportunities and solutions for families and individuals regardless of income. The company utilizes the entire breadth of an internal family of companies to fulfill its mission to acquire, develop, design, build and deliver the best-in-class residential experience for persons of moderate income. Legacy IMPACT Housing has a disciplined experienced team of experts vetting opportunities and the infrastructure to execute creative, impactful housing developments varying in complexity and scope.

Our mission is to create quality homes for residents of modest means while enabling them to reach their fullest potential in life.

As stewards of the land and of public trust, we pursue our mission in the spirit of service, teamwork, and respect. We embrace collaboration, innovation, and perseverance to find the best locations, living, and lifestyle environment.





A FAMILY OF COMPANIES



2018

Best Townhome

2016

Best One-of-a-Kind Townhome

2015

*Best Overall Community for a Developer
101-300 units*

*The Reserve at Lake Travis
Hal Jones Developments*

*Best Design Product — \$400,000-\$499,000 —
Custom Builder*

*Cliffside Cottages at The Reserve at Lake Travis
Builder: Legacy DCS*

*Designer: Brewer Design Solutions
Architect: Cornerstone Architects*

2014

Best Product Design

*314 Ridgewood Road, Austin, Texas
Architect: Cornerstone Architects*

*Best Product Design — Volume
Builder — The Cabins at The Reserve at Lake Travis
Architect: INSITE Architecture Inc.
Interior Merchandiser: Brewer Design Solutions*

2013

*Best Overall Community
The Reserve at Lake Travis*



2016

*Top Women-Owned Businesses
Ranked by 2016 Revenue #7*

Custom Homebuilder

2015

*Top Women-Owned Businesses
Ranked by 2014 Revenue
#17*

*Custom Homebuilder
Ranked by 2014 New Home Sales Volume
#12*



COOL HOUSE TOUR

2015

*Extreme Remodel
6303 Indian Canyon Drive
Designer: Brewer Design Solutions
Design Architect: Hobbs' Ink*

2014

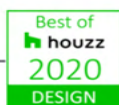
*New Build
1702 S. 6th St., Austin, Texas
Design Architect: Hobbs' Ink*

*New Build
314 Ridgewood Road, Austin, Texas
Architect: Cornerstone Architects*



2017

Best Outdoor Living Space



2016

*Best of Houzz
Top 3%*



2013

**NAHB, NATIONAL GREEN BUILDER
CUSTOM HOME**

Honorable Mention

*314 Ridgewood, Austin, Texas
Architect: Cornerstone Architects*

LEADERSHIP



CASS BREWER
PRESIDENT & CEO

Cass Brewer, President and born entrepreneur, has been launching and managing businesses since age 13. He has worked for a Fortune 100 corporation in its development divisions, been Vice President of the Texas Division of Centex Destination Properties, and managed projects for C.F. Jordan, Inc., a leading developer of multi-family housing. Brewer has a long history in renovations, home building and multifamily condo construction giving him the dual advantage of not only knowing the most efficient means of completing a project, but also being able to provide thoughtful, personal service that is so often missing in this industry. Brewer holds a Bachelor of Science degree in Urban and Regional Planning from Texas State University. He is a Certified EnergyStar Builder committed to the concept of high quality green building.



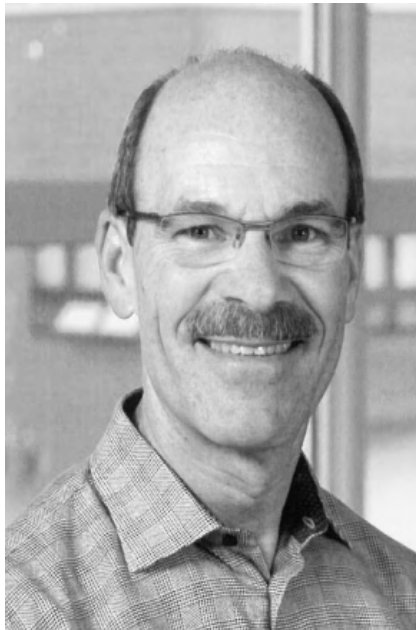
CARRIE BREWER
OWNER, CREATIVE DIRECTOR

Carrie's strong commitment to design excellence characterizes all her firms' work. A "Top Woman-Owned Business" leader in the Austin area, Brewer began her professional career as an administrative assistant with GRW Studios, a real estate investment firm that celebrated restoring buildings, including entire streets of small towns. In this role, she had the opportunity to learn under the leadership's extraordinary vision for beautification. After college, Carrie joined Austin Ventures, a leading venture investment firm instrumental in launching a variety of entrepreneurial ventures. Her experience in researching and analyzing the potential of several business types provides a broad understanding of the requirements for success.



JACK JOHANNESMEYER
CHIEF FINANCIAL OFFICER

A Florida native, Jack Johannesmeyer earned a Bachelor's and Master's Degrees in Accounting from the University of Florida, and holds both a MBA and CPA. He has worked in Big 4 Public Accounting, for 3 Fortune 500 companies, and 2 of the largest public homebuilders in the Country. Prior to joining Legacy, he was the CFO for 7 years for an \$850 million publicly traded HVAC distributor. Jack brings extensive experience in financial modeling and deal analysis, as well as a strong attention to internal controls, cash flow management, and safeguarding of assets. Jack's addition strengthens Legacy' fiduciary experience, acumen, and discipline needed to grow the company to the next level for all our stakeholders.



CRAIG ALTER
MANAGING DIRECTOR

Craig brings over 25 years of experience pinpointing responsive strategies for meeting affordable housing needs. He earned an undergraduate degree in natural resource management and a graduate degree in urban/regional planning from the University of Michigan. In constructing or rehabilitating more than 3,500 housing units, Craig has drawn from his expertise in the 4% and 9% tax credit programs, HUD loan and housing voucher products, public/private partnerships, site and architectural design, and project management. Craig is an expert at locating project sites, managing project design professionals, securing financing and development entitlements, and assisting with construction oversight and property lease-up. Craig's passion for developing great housing communities has guided his work as a consultant, public and non-profit board member, developer, housing finance corporation director, and public housing authority director.



**CHARLES BREWER
SENIOR ADVISOR**

During a storied career in residential construction, Charles Brewer has built homes and apartment communities all over Texas and the Southeastern United States.

Charles sets the bar high in an industry which includes not only his two sons Cass and Andrew, but also his brother Tom and nephew Chad Brewer. Their combined network of information, influence, and skills allows them to manage the growing challenges of contracting, development, and construction with great professionalism.

Cass and Carrie Brewer built Legacy to serve Central Texas and other areas; Charles is proud and delighted to be a part of this new chapter in the Brewer legacy.



**ALICE GLASCO
SENIOR ADVISOR**

Having worked for the City of Austin for 21 years, Ms. Glasco retired in January 2006 and started Alice Glasco Consulting, an urban planning firm that provides land development consulting services to developers and individual property owners.

During her tenure with the City of Austin, Ms. Glasco directed two departments, namely the Neighborhood Planning and Zoning Department, where she was in charge of planning neighborhoods; and the Development Review and Inspection Department, where she directed all aspects of land development that included zoning, subdivision of land, site plan review, building permits, building inspections, and code enforcement.

Ms. Glasco received a Bachelor's degree in Political Science and a Master of Science in Community and Regional Planning from the University of Texas at Austin. She is a member of the Real Estate Council of Austin, currently serves on the Ascension Texas Board of Directors (formerly known as Seton family of Hospitals) and previously served on the board of directors for the Salvation Army and the Boys and Girls Club of the Austin Area.



ANDY BREWER
CHIEF OPERATING OFFICER

With a keen understanding of all forms of residential construction, Brewer brings years of experience and a proven track record as a Senior Project Manager in the multi-family industry. Brewer leads the charge in multi-family, hospitality and mixed-use projects. Andy has successfully completed a multitude of project types including multi-family, mixed-use, senior living, affordable housing, condominiums, single family luxury residential communities, light commercial, high-end custom homes and residential remodels of all types. This wide experience and a family heritage of construction intensifies Brewer's thorough understanding of construction documents, construction methodologies, product design and contract negotiations. He excels in pre-construction and development analysis, as well as coordinating the project team members and contractors. Brewer holds a Bachelor of Arts in Geography with an emphasis on Urban Planning from the University of Texas at Austin.



GREGORY COLE
DIRECTOR OF CONSTRUCTION

Greg has worked in the construction industry since 2004 after graduating from Texas A&M University. Prior to joining the Legacy MCS team he started his career in single family homes at Pulte Homes in San Antonio before transitioning to multifamily with Greystar in the Austin and Houston area. Greg has experience working on projects ranging from garden style apartment complexes to mid-rise/mixed-use apartments. Greg's expertise in the construction industry led to his promotion from Assistant Superintendent to a Senior Project Manager. Greg also has a Master of Science degree in Finance from Northeastern University.

Legacy MCS Project Portfolio



SCOPE:

122-Unit, 6 Story Apartment Development 2
Story Parking Garage
Elevated Pool, Courtyard
Roof Terrace

CLIENT: Urban Flats

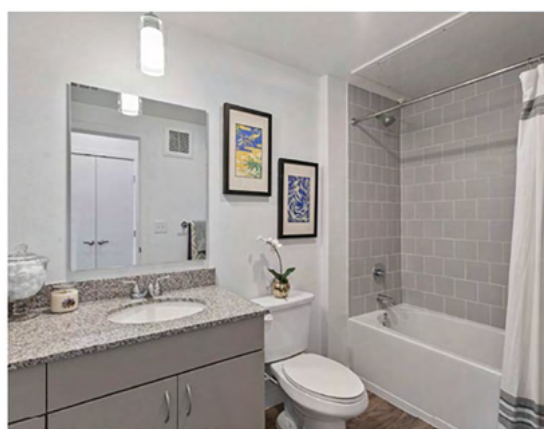
BUDGET: \$13.6M

LOCATION: Austin, TX

COMPLETION DATE: January 2020

PROJECT DESCRIPTION:

Mariposa Flats is a 122-unit stacked apartment development located minutes from downtown Austin. Residents will get the choice of 11 modern floorplans ranging from 395-902sqft. These designs feature stainless steel appliances, quartz countertops, designer paint, wood plank flooring, large closets, and select units will have views of downtown Austin. This project involves the construction of all 122 units, luxury pool deck, fitness center, outdoor gathering areas and a two-story parking garage.





ISABELLA

SCOPE:

20 Townhomes
Public Road Extension
Dog Park
Rain Garden
Outdoor Gathering Areas

CLIENT: Legacy Communities

ARCHITECT: The Davies Collaborative

BUDGET: \$16.2M

LOCATION: Austin, TX

COMPLETION DATE: December 2020

PROJECT DESCRIPTION:

Detached and attached two and three-story for sale townhomes ranging in size from 1052 sqft to 2101 sqft. Each townhome has a two-car garage and backyard. The site work included extensive expansion of the storm system and extension of Valley View road. Total Site Work area of 1.644 acres including road. Privately connected in the thriving South Austin community rests 20 eclectic residences in a quiet neighborhood surrounded by trees within minutes of lifestyle amenities that truly allow you to work, live, and play close to home. The Isabella showcases a leading-edge architectural experience integrated with designer finishes and an integrity of construction that is second to none.





WYNDHAM

WORLDMARK TIMESHARE

SCOPE: 96-Unit Timeshare Resort

CLIENT: Wyndham Worldwide Corp.

ARCHITECT: Morris

BUDGET: \$22.5M

LOCATION: Marble Falls, TX

COMPLETION DATE: March 2017

PROJECT DESCRIPTION:

The WorldMark Wyndham at Marble Falls offers one, two and three bedroom guest rooms; a two and three bedroom penthouse, as well as one and two bedroom Presidential suites. This project included the development and construction of 96 guest rooms, sales office, resort style pool, playground, and amenity center.



**SCOPE:**

151 Unit Home Rental Community
Leasing Office
Pool
Dog Park
Outdoor Gym

CLIENT: Urban Moment

ARCHITECT: Anderson Architects

BUDGET: \$18.6M

LOCATION: Austin, TX

COMPLETION DATE: April 2020

PROJECT DESCRIPTION:

Urbana at Goodnight Ranch is a for rent home community located in southeast Austin within the master plan community of Goodnight Ranch. The project consists of duplexes, one story, and two-story houses each with private backyards across 11.6 acres. There are (4) Unit types ranging from a 632 sqft to 1383 sqft. The distinct pitch roofs and eye-catching exterior accent colors give the houses a modern look. From smart design principles to luxury finishes like granite countertops, stainless steel appliances, recessed lighting, and wood-style plank flooring the interiors provide a home feel for a rental product.



UNDER CONSTRUCTION

**SCOPE:**

144 Unit Home Rental Community
Pool
Clubhouse
Dog Park
New Public Street

CLIENT: Urban Moment

ARCHITECT: Anderson Architects

BUDGET: \$15M

LOCATION: Kyle, TX

COMPLETION DATE: Projected July 2021

PROJECT DESCRIPTION:

Urbana at Plum Creek is a for rent home community located in Kyle, Texas within the master plan community of Plum Creek. The project consists of duplexes and single story houses each with private backyards across 11.48 acres. There are (3) Unit types ranging from a 632 sqft to 1246 sqft. The distinct pitch roofs and eye-catching exterior accent colors give the houses a modern look. From smart design principles to luxury finishes like granite countertops, stainless steel appliances, recessed lighting, and wood-style plank flooring the interiors provide a home feel for a rental product.



UNDER CONSTRUCTION



SCOPE:

83 Stacked Flats
7 Townhomes
Pool and Deck
Dog Wash
Live Work Units
Roof Terrace
Public Park
Dog Park
2 Elevators

CLIENT: Legacy Communities

ARCHITECT: Kelly Grossman Architects

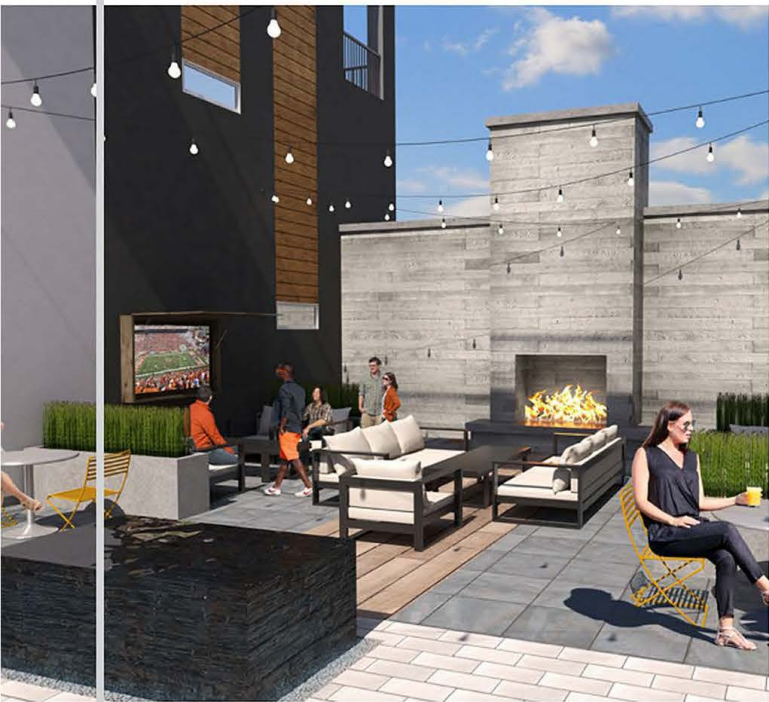
BUDGET: \$18M

LOCATION: Austin, TX

COMPLETION DATE: Projected July 2022

PROJECT DESCRIPTION:

Gravity consists of (83) stacked flat units in (2), four story, type VA wood buildings, and (7) attached, two story townhomes on 4.3 acres in east Austin. All Units are for sale. The project includes car charging stations, pool, pool deck, roof terrace, live work units, dog wash, 2 elevators, and a 1 acre public park. Stacked flat units range from 698 sqft to 1306 sqft. The masterfully designed floor plans are an exquisite blend of urban style and relaxing comfort in an innovative setting detailed with modern, high-end finishes.





SCOPE:

Type VA Podium Structure
Underground Parking Gargae 136
Units
Podium Pool, Deck Commercial Retail
Space Dog Wash, Dog Park
Live Work Units
Rain Garden
4th Floor Deck Amenity

CLIENT: Legacy Communities

ARCHITECT: Kelly Grossman Architects

BUDGET: \$30.9M

LOCATION: Austin, TX

COMPLETION DATE: July 2022

PROJECT DESCRIPTION:

The Station consists of 136 stacked flat, for sale, units in (2) type VA wood buildings, built on a ground level podium deck. The project site is 3.063 acres. The project has a rain garden, car charging stations in the parking garage, podium pool and pool deck, 4th floor terrace, live work units, dog wash, 2 elevators, fitness center, yoga studio, dog park, lounge, resident office space, outdoor BBQ area, and commercial space. Stacked flat units range from 652 sqft to 2092 sqft. An urban revival theme is painted throughout the community bringing together thoughtful architecture designed for modern-day functionality with rich industrial-style finishes.



**Scope:**

247 Rental Homes
Extension of (2) Public Streets
Pool and Outdoor Lounge
Dog Wash/Dog Parks
Detached Garages

Client: Urban Moment

Architect: Anderson Architects

Budget: \$36.9M

Location: Round Rock, TX

Completion Date: Projected to start Aug 2021

PROJECT DESCRIPTION:

Urbana at Meadow Lake is a for rent home community located in Round Rock, Texas. The project consists of duplexes, single story, and two story houses each with private backyards. There are (4) Unit types ranging from a 635 sqft to 1402 sqft. In addition to typical utility work for a project of this nature, two public street extensions will be built separating different phases of the overall project. As with other Urbana communities this project will incorporate smart design principles to luxury finishes like granite countertops, stainless steel appliances, recessed lighting, and wood-style plank flooring the interiors provide a home feel for a rental product.



LEGACY MCS PRINCIPAL & OWNERSHIP EXPERIENCE

LEGACY MCS PRINCIPAL & OWNERSHIP EXPERIENCE OVER ONE BILLION DOLLARS IN CONSTRUCTION COMPLETED

Legacy MCS - Project Experience

Legacy MCS - Current Projects

Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
Gravity - 90 stacked flats at 4901 Springdale Rd	Legacy Communities	Kelly Grossman	\$ 17,939,836.44	19.25%	7.29.22
Urbana at Plum Creek - 144 Rental Homes	Urban Moment	Anderson	\$ 15,130,969.00	93%	7.15.21
The Station - 136 stacked flats	Legacy Communities	Kelly Grossman	\$ 30,990,811.07	APR 21 start date	4.3.23
Urbana at Meadow Lake - 247 Rental Homes	Urban Moment	Anderson	\$ 306,997,628.42	APR 21 start date	1.27.23
			101,246,738.03		

Legacy MCS - Completed Projects

Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
505 Tillery Street, Austin TX - (12) Unit Condo Project	Pierre and Isabelle Fay	Danze & Davis	\$ 3,000,000.00	100%	4.1.17
The Wyndham Worldmark - Marble Falls (96) Unit Time Share Resort Project	Wyndham Worldwide	Morris	\$ 22,500,000.00	100%	2.1.17
The LAAN Phase 1 3100 Manchaca - (22) Unit Condo Project	Four T Realty	Davies Collaborative	\$ 10,000,000.00	100%	10.1.17
1801 E 2nd, Austin, TX (8) Unit Condo project	Pierre and Isabelle Fay	Danze & Davis	\$ 2,500,000.00	100%	2.1.16
Urbana at Goodnight Ranch Phase 1 - (70) Rental Homes	Urban Moment	Anderson	\$ 8,918,302.46	100%	10.15.19
Mariposa Flats - Austin (122) unit apartment project. 4 story wood frame over Parking garage	Flats on Mariposa, LLC	The Davies Collaborative	\$ 13,615,067.35	100%	1.31.20
Urbana at Goodnight Ranch Phase 2 - (81) Rental Homes	Urban Moment	Anderson	\$ 9,723,123.53	100%	4.30.20
Isabella Condos - 20 Luxury attached townhomes	Legacy Communities	The Davies Collaborative	\$ 6,275,718.37	100%	12.23.20
			\$ 76,532,211.71		

Legacy MCS Team Member Experience

Andy Brewer - Previous Experience

Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
Corpus Christi, Tx - The Cosmopolitan 165 Downtown Podium Units	Realtex	BGO Architects	\$ 18,000,000.00	100%	6.1.15
Austin, TX - The Legacy 250 Class A Units	Realtex	BGO Architects	\$ 19,000,000.00	100%	8.1.15
Houston, Tx - Estates at Ellington 72 Affordable Housing Units	Realtex	BGO Architects	\$ 6,000,000.00	100%	6.1.15
Nacadoches, Tx - Pine Lake Estates 72 Affordable Housing Units	Realtex	NDA	\$ 4,000,000.00	100%	7.1.15
Austin, Tx - Windy Ridge 120 Affordable Housing Units	Realtex	BGO Architects	\$ 9,000,000.00	100%	12.1.15
Nolanville, Tx - Oak Ridge 48 Affordable Housing Units	Realtex	Kelly Grossman	\$ 4,000,000.00	100%	6.1.15
Bryan TX - Highland Villas 180 Affordable Housing Units	Realtex	Humphrey's & Assoc.	\$ 14,000,000.00	100%	11.1.14
Waco, TX - Franklin Place 63 Downtown Market Rate Units	Realtex	RBDR Architects	\$ 5,500,000.00	100%	5.1.14
Sulphur Springs, TX - Heritage Village 80 Affordable Units	Realtex		\$ 8,400,000.00	100%	11.1.13
Beeville, TX - Amberstone 54 Affordable Units	Generation Housing Development	BGO Architects	\$ 6,500,000.00	100%	2.1.13
Austin, TX - Rosemont at Hidden Creek 280 Units	Southwest Housing	BGO Architects	\$ 18,000,000.00	100%	2007
Austin, TX - Rosemont at Williamson Creek 186 Units	Southwest Housing	BGO Architects	\$ 14,000,000.00	100%	2006
Austin, TX - Pleasant Valley Villas 300 Units	Southwest Housing	BGO Architects	\$ 43,000,000.00	100%	2004
Austin, TX - Primrose at Shadow Creek 180 Units	Southwest Housing	BGO Architects	\$ 16,000,000.00	100%	2002
San Antonio, TX - Bristol Park 324 Units	C.F. Jordan	Humphrey's & Assoc.	\$ 24,000,000.00	100%	2001
Austin, TX - Melrose Phase II 180 Student Housing Units	C.F. Jordan		\$ 10,000,000.00	100%	2001
Mesquite, TX - Mission Courtyard Villas 315 Apartment Units	C.F. Jordan		\$ 18,000,000.00	100%	2000
San Antonio, TX - Waterford Independent Living 120 Units	C.F. Jordan		\$ 6,300,000.00	100%	1999
College Station, TX - Melrose 348 Student Housing Units	C.F. Jordan		\$ 19,800,000.00	100%	1997
Austin, TX - McNeil House Apartments 152 Units	C.F. Jordan	Looney, Ricks & Kiss	\$ 18,500,000.00	100%	1997
			\$ 282,000,000.00		

Cass Brewer - Previous Experience

Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
Galveston, Tx - Point West 2000 Units Entitled / 750 Units Built	Centex	Oz Architecture	\$ 170,000,000.00	100%	2008
Horseshoe Bay, TX - The Waters 200 Units	Centex	Insite Architecture	\$ 63,000,000.00	100%	2008
Jonestown, TX - The Hollows 1700 Units Entitled / 400 Units	Centex	Insite Architecture	\$ 76,000,000.00	100%	2008
Austin, TX - Pleasant Valley Villas 300 Units	Southwest Housing	BGO Architects	\$ 43,000,000.00	100%	2004
San Antonio, TX - Bristol Park at Encino Commons 324 Units	Echelon	Humphrey's & Assoc.	\$ 31,000,000.00	100%	2001
Houston, TX - Lakeside Villas 186 Units		BGO Architects	\$ 12,000,000.00	100%	1999
Austin, TX - Trails at the Park 200 Units	Foundation Communities	Chiles Architects	\$ 8,500,000.00	100%	1998
Austin, TX - Southwest Trails at the Park 160 Units	Foundation Communities	Chiles Architects	\$ 15,000,000.00	100%	1997
			\$ 403,500,000.00		



Charles Brewer - Previous Experience

Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
Austin Triangle Phase I - 343 Units			\$ 29,000,000.00	100%	
Gables Grandview - 452 Units			\$ 32,000,000.00	100%	
Stoneleigh at Gracy Farms - 190 Units			\$ 10,000,000.00	100%	
The Palazzo - 152 Units			\$ 8,500,000.00	100%	
Monterey Ranch - 450 Units			\$ 29,500,000.00	100%	
Melrose Place Student Housing - 180 Units			\$ 10,000,000.00	100%	
Echelon at Memorial Creek - 292 Units			\$ 15,000,000.00	100%	
Oaks of Kingbridge - 232 Units			\$ 17,000,000.00	100%	
Villa D Orleans - 192 Units			\$ 10,000,000.00	100%	
Legacy at Southpark - 250 Units			\$ 19,000,000.00	100%	
Highland Villas - 180 Units			\$ 14,200,000.00	100%	
Regency Way Apartments - 120 Units Redevelopment			\$ 11,300,000.00	100%	
Crescent Villas II - 76 Units			\$ 5,525,000.00	100%	
Sunset Way Apartments - 96 Units			\$ 6,700,000.00	100%	
Baywood Senior Apartments - 72 Units			\$ 6,950,000.00	100%	
The Estates at Juan De Cevalos - 128 Units Redevelopment			\$ 12,200,000.00	100%	
Morris Village Senior Apartments - 120 Units Redevelopment			\$ 11,200,000.00	100%	
Taylor Heights Apartments - 144 Units Redevelopment			\$ 12,600,000.00	100%	
Timber Grove Apartments - 96 Units			\$ 8,400,000.00	100%	
Washington Village Apartments - 96 Units			\$ 6,990,000.00	100%	
Highland Springs Apartments - 96 Units			\$ 9,445,000.00	100%	
Timber Village II Apartments - 72 Units			\$ 5,650,000.00	100%	
Horizon Meadows Apartments - 96 Units			\$ 8,255,000.00	100%	
Village Place Apartments - 96 Units			\$ 8,775,000.00	100%	
Baytown Senior Apartments - 80 Units Renovation			\$ 2,400,000.00	100%	
Hickory Ridge Apartments - 22 Units			\$ 2,387,500.00	100%	
Amberstone Apartments - 54 Units			\$ 7,500,000.00	100%	
Heartland Village Apartments - 96 Units			\$ 6,900,000.00	100%	
Franklin Place - 63 Units			\$ 5,500,000.00	100%	
La Joya Villages - 55 Units			\$ 6,155,000.00	100%	

\$ 339,032,500.00

Gregory Cole - Previous Experience

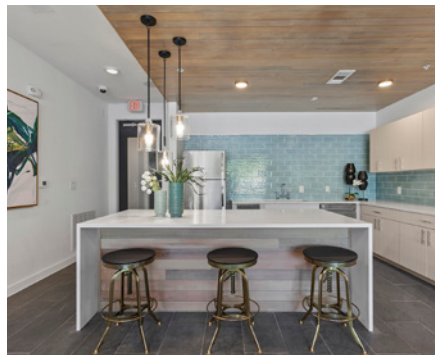
Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
Arnold II - Austin - 115 unit 5 story high density mixed use apartment project	Transwestern	Wilder Belshaw	\$ 20,387,262.00	100%	2018
Studio Eastside - Austin - 139 unit 5 story podium style mixed use micro apartments	Transwestern	Wilder Belshaw	\$ 15,067,343.00	100%	2017
Rivera - San Antonio - 302 Unit 5 story mixed use apartments	Argyle	Good Fulton and Ferrel	\$ 30,805,852.00	100%	2016
Burnet Market Place - Austin - 343 Unit 5 story mixed use apartments	Argyle	Good Fulton and Ferrel	\$ 34,751,522.00	100%	2016
Corazon - Austin - 256 Unit 6 story mixed use podium style apartment project	Argyle	Good Fulton and Ferrel	\$ 27,321,566.00	100%	2014
Baywood Apartments - 336 unit 27 building garden style apartments			\$ 22,000,000.00	100%	2010
Cole Apartments - Austin - 119 Unit 5 story multi use apartment project	Phoenix Property Company		\$ 22,000,000.00	100%	2009
300 N. Lamar - Austin - 154 Unit 5 story high density wrap project.	Phoenix Property Company		\$ 17,000,000.00	100%	2008

\$ 189,333,545.00

William Doerr - Previous Experience

Project	Owner	Architect	Contract Amount	% Complete	Scheduled Completion Date
Austin, TX - UT Mithoff Track & Field - Total interior demo and rebuild of interior - 12,000 s.f.	University of Texas Athletics	TreanorHL	\$ 5,000,000.00	100%	2020
Austin, TX - Buck Mason Clothing - Music Lane Commercial T.I.	Buck Mason	Chris Dolce	\$ 375,000.00	100%	2020
Austin, TX - Dr Amy Myers Fulfillment Center - 15,000 s.f. T.I. of existing warehouse	Dr Amy Myers M.D.	Chris Dolce	\$ 1,300,000.00	100%	2020
Austin, TX - Allbirds Shoes - Music Lane Commercial T.I.	Allbirds Shoe Store	Theresa Kurnadi	\$ 450,000.00	100%	2020
Austin, TX - Ruth Schulze Coop Housing - UT - 26 attached for rent units	ICC	Mark Hart	\$ 3,050,000.00	100%	2019
Austin, TX - UT Player Development Center - Baseball Indoor Training Facility	University of Texas Athletics	TreanorHL	\$ 21,000,000.00	100%	2019
Temple, TX - Bitmovia Data - Digital currency processing center - 18,150 s.f.	Bitmovia	Paradisa Commercial	\$ 845,000.00	100%	2018
Austin, TX - Eastline Condominiums - 47,000 s.f. mixed use condos with podium	PSW	PSW	\$ 8,500,000.00	100%	2017
Austin, TX - 12th St. Court - Attached podium multi family - 20 units	PSW	PSW	\$ 14,000,000.00	100%	2017
Austin, TX - Thornton Flats Apartments - Attached for rent - 65 units	PSW	PSW	\$ 10,500,000.00	100%	2016
Austin, TX - 5011 Balcones - Attached for sale residential - 4 units	PSW	PSW	\$ 3,000,000.00	100%	2016
Austin, TX - Forest Trail - Detached Single Family Community - 11 units	PSW	PSW	\$ 8,000,000.00	100%	2015

\$ 76,020,000.00





LEGACY DCS

5-STAR AWARDED AUSTIN ENERGY GREEN BUILDER

By combining Legacy's renowned Peak Performance Green Building Practices with Tesla's advanced Solar Roof and Power Wall Technology, we have an extraordinary opportunity to provide Austin residents with an advanced eco-living experience that will disrupt the home building industry and, most importantly, change the lives of our valued home owners.



CASS BREWER



Cass Brewer, born entrepreneur, has been launching and managing businesses since age 13. He has worked for a Fortune 100 corporation in its development divisions, been Vice President of the Texas Division of Centex Destination Properties, and managed projects for C.F. Jordan, Inc., a leading developer of multi-family housing. Brewer has been recognized for his passion for sustainable building practices and innovative design concepts including his hallmark collection of Peak Performance Lifestyle Homes™. His diverse experience in home building, renovations and multifamily-condo construction gives him the advantage of knowing the most efficient means of completing a project. Cass holds a Bachelor of Science degree in Urban and Regional Planning from Texas State University. He is a Certified Energy Star Builder committed to the concept of high quality green building. Cass currently lives in Lost Creek area of Austin, Texas with his wife and two children.

EDUCATION:

Texas State University
Bachelor of Science
Urban and Regional Planning

COMMUNITY INVOLVEMENT:

City of Jonestown, TX
Mayor

Jonestown Chamber of Commerce
Member

Austin Chamber of Commerce
Member

Young Mens Service League
Member of Westlake Chapter

Home Builder Association
Austin, TX

National Association Home Builder
Member

NFIB Small Business Association of Texas
Member

Lonestar Legacy Charity
Board Member

Cub Scouts of America
Den Leader

Hoper After Harvey Charity
Leader

PROJECT EXPERIENCE:

Gravity ATX - Austin, TX

The Addie at Westlake - Austin, TX

The Isabella - Austin, TX

The Station at St. Elmo - Austin, TX

Westside Landing at Rough Hollow - Lakeway, TX

The Peninsula at Rough Hollow - Lakeway, TX

Serene Hills - Lakeway, TX

Reserve at Lake Travis - Spicewood, TX

Bouldin Ave. - Austin, TX

The LAAN - Austin, TX

Custom Homes - Austin, TX

The Hollows on Lake Travis- Lago Vista, TX

The Grove, Summit Rock - Horseshoe Bay, TX

Cinnamon Shore - Port Aransas, TX

Palmilla Beach - Port Aransas, TX

Sunflower Beach - Port Aransas, TX

Reserve at St. Charles Bay - Rockport, TX

Point West - Galveston, TX



Westside Landing at Rough Hollow, 2020 Max Awards Neighborhood of the Year

JACK JOHANNESMEYER, CHIEF FINANCIAL OFFICER



A Florida native, Jack Johannesmeyer earned a Bachelor's and Master's Degrees in Accounting from the University of Florida, and holds both a MBA and CPA. He has worked in Big 4 Public Accounting, for 3 Fortune 500 companies, and 2 of the largest public homebuilders in the Country. Prior to joining Legacy, he was the CFO for 7 years for an \$850 million publicly traded HVAC distributor. Jack brings extensive experience in financial modeling and deal analysis, as well as a strong attention to internal controls, cash flow management, and safeguarding of assets. Jack's addition strengthens Legacy's fiduciary experience, acumen, and discipline needed to grow the company to the next level for all our stakeholders.

EDUCATION:

University of Florida, Gainesville, FL
Bachelor of Accounting
Masters of Accounting and Taxation

Crummer School of Business - Winter Park, FL
Masters of Business Administration

PROJECT EXPERIENCE:

Gravity ATX - Austin, TX
The Addie at Westlake - Austin, TX
The Isabella - Austin, TX
The Station at St. Elmo - Austin, TX
Westside Landing at Rough Hollow - Lakeway, TX
The Peninsula at Rough Hollow - Lakeway, TX
Serene Hills - Lakeway, TX
Reserve at Lake Travis - Spicewood, TX
The LAAN - Austin, TX
Mariposa Flats - Austin, TX
Custom Homes - Austin, TX
505 Tillery - Austin, TX
Wyndham Worldmark - Marble Falls, TX
The Hollows on Lake Travis- Lago Vista, TX
The Grove, Summit Rock - Horseshoe Bay, TX
Cinnamon Shore - Port Aransas, TX
Palmilla Beach - Port Aransas, TX
Sunflower Beach - Port Aransas, TX
Reserve at St. Charles Bay - Rockport, TX

PROFESSIONAL EXPERIENCE:

Legacy Development and Construction Services
Chief Financial Officer
Chief Operations Officer
Legacy Multi-family Construction Services
Chief Financial Officer
Chief Operations Officer
Baker Distributing Company, Jacksonville, FL
Chief Financial Officer
Senior Vice President of Strategic Planning
Meritage Homes / Central Florida Division, Orlando, FL
Vice President of Finance / Operations
Globe Wireless, Melbourne, FL
Chief Financial Officer
Allete Properties, Fort Myers, FL
Chief Financial Officer
Pulte Homes Location, Orlando, FL
Florida Regional Controller
Hilton Grand Vacations Company, Orlando, FL
Senior Finance Manager
Walt Disney Company, Orlando, FL
Finance Manager – Financial Planning & Reporting
CNL Group, Orlando, FL
Senior Accountant

THE ADDIE AT WESTLAKE



SIZE

34 Single Family
Homes 12
Townhomes

DEVELOPER

Legacy DCS

ARCHITECT

DTJ Design

DESIGNER

Brewer Design
Solutions

PROJECT DESCRIPTION

Resting in the heart of Westlake Hills, The Addie, a collection of 46 single family and townhome residences in a gated neighborhood close to downtown Austin yet surrounded by the Texas Hill Country. The Addie is revolutionizing the Westlake area with thoughtfully designed home offerings drawn for functionality with minimal maintenance. Diverse architecture rests behind the gates of the only new neighborhood in Westlake offering luxury homes and breathtaking views at an enticing price point. Starting in the \$800s-\$2M, priority sales reservations were converted to contracts in the Summer of 2020 with a projected sell out by Summer of 2021. The community broke ground in the Fall of 2020 and the first homes are on schedule for delivery in Q1 of 2022.



COOPER'S SQUARE



SIZE

30 Single Family
Homes

DEVELOPER

Legacy DCS

ARCHITECT

Kipp Flores

DESIGNER

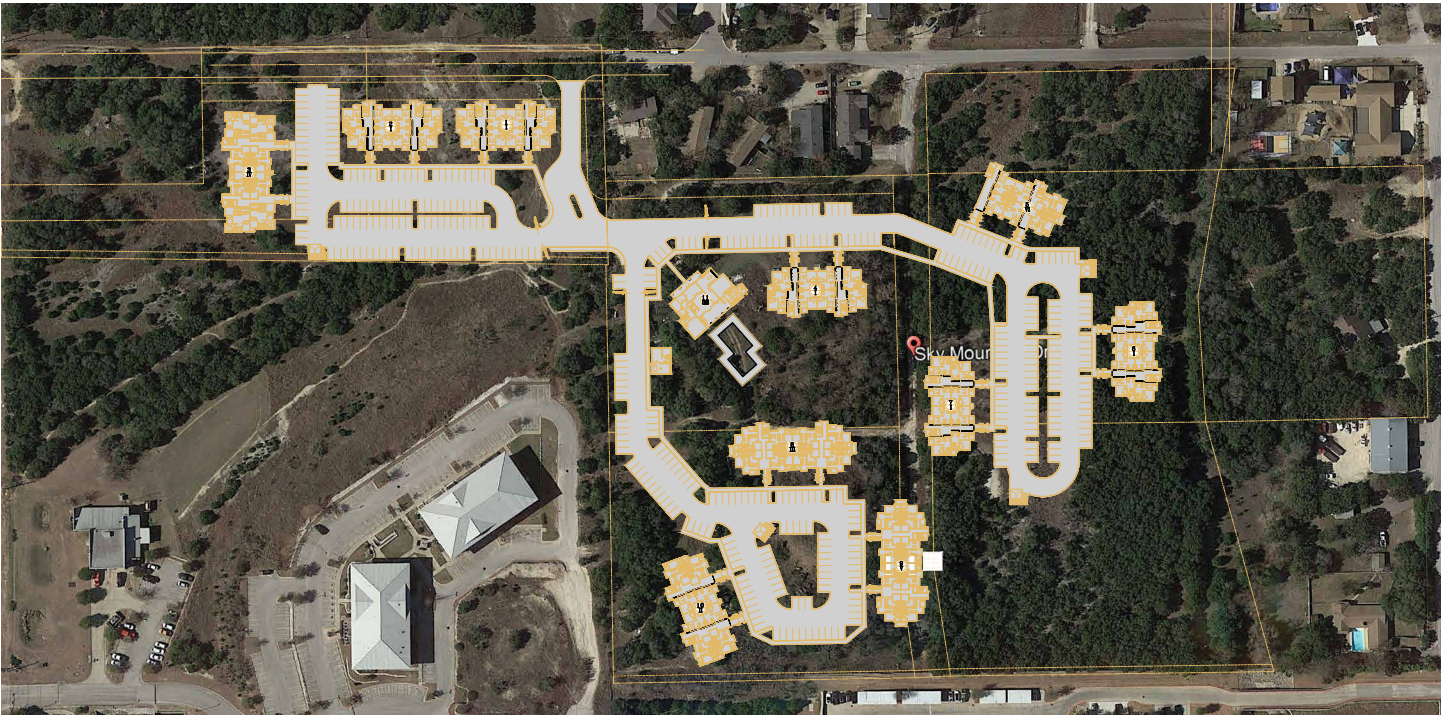
Brewer Design
Solutions

PROJECT DESCRIPTION

Found just east of Interstate 35, Cooper's Square is a brand new South Austin community. This 10-acre condominium community features 30 homes with contemporary designs. New homes from the \$400s-\$500s surround Cooper's "town square", an inviting open-space park designed for meeting neighbors, friends and four-legged socialites. Inside, features range from quartz counter tops in the kitchen to walk-in showers in the bathroom. Cooper's Square is minutes from Dittmar Park, where residents can relax by the pool or work out in the recreation center. The Southpark Meadows shopping center is packed with popular retailers, restaurants, and entertainment. Residents can meet up with friends for lunch at Trudy's, or enjoy live music and the relaxed atmosphere at Moontower Saloon. Cooper's Square began development in the Fall of 2020 and is on schedule to deliver homes by end the of 2021.



SKY MOUNTAIN



SIZE

234 Multi-Family
Rental Apartments

DEVELOPER

Legacy MCS

ARCHITECT

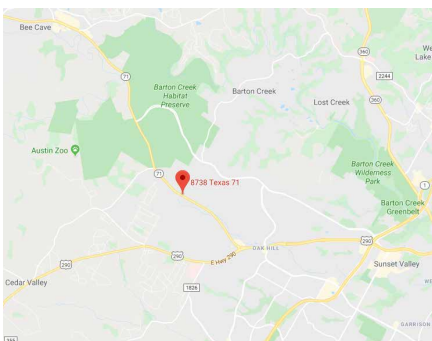
Kelly Grossman

ENGINEER

LJA Engineering

PROJECT DESCRIPTION

Located in the Oak Hill area of Southwest Austin this project includes 234 multifamily apartment homes. This 6.45 acre site rests between Hwy.71 and Southwest Pkwy offering easy access to major commercial and business complexes in the South Central Austin area.



CHERRY KNOLL



SIZE

26.2 Acres
126 units

DEVELOPER

Legacy

ARCHITECT

DTJ Design

DESIGNER

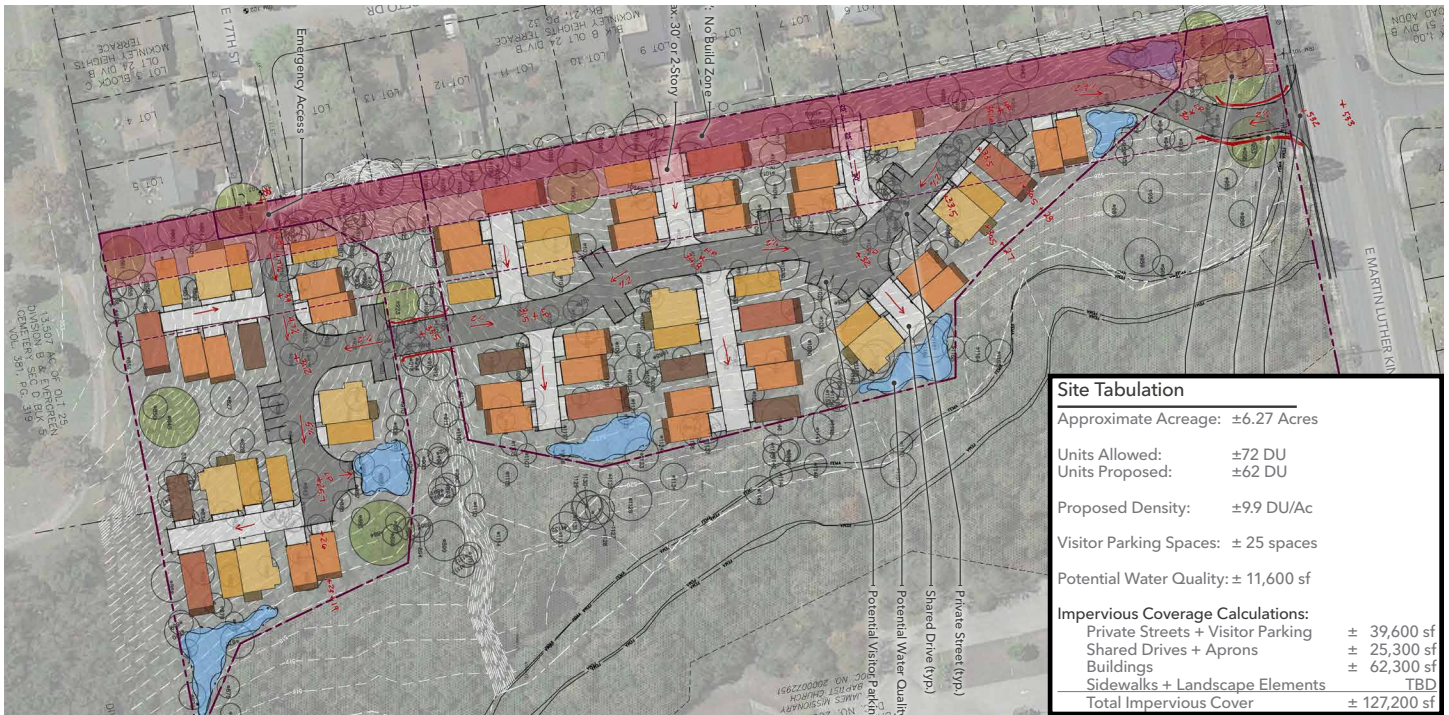
Brewer Design
Solutions

PROJECT DESCRIPTION

Cherry Knoll is a proposed development in the heart of Lakeway on the southside of Lake Travis and roughly 23 miles (or 35 minutes) northwest of downtown Austin. The site is within minutes of Lake Travis High School rated top 3 in the Austin area and 23rd out of 1002 school districts in the State of Texas. Priced from the high \$300's, Cherry Knoll offers 3 distinct product segments including townhomes, duplex homes and detached single family residences ranging from 1,270 to over 2,500 square feet. Projected community amenities include walking trails, open space and a community pocket park.



ISABELLA EAST - IN DEVELOPMENT



SIZE

6.3 Acres
62-72
Townhomes

PROJECT DESCRIPTION

3400 East MLK Boulevard is a unique opportunity to acquire a large tract of land currently zoned for high density single-family residences in the desirable East Austin area. This 6.3 acre site is ideally located within minutes of major entertainment and employment corridors including Mueller Tower District (within 1 mile) and downtown Austin (3.5 miles). East Austin has been continually growing and as more people move to Austin looking for convenient commutes to the downtown employment centers demand for and development of the area is expected to accelerate. The land plan for this site will include 62-72 townhome residences ranging from 1200 - 2100sqft. starting from the high \$400s.



PROJECT EXCELLENCE

2020

MAX Awards - Neighborhood of the Year, Westside Landing MAX Awards - Sales Professional of the Year Finalist
Parade of Homes - Most Unique Landscape
Parade of Homes - Best Elevation

2019

Austin Energy Green Builder - 5 Star Rated
MAX Awards - Best Custom Home Finalist
MAX Awards - Home of the Year Finalist

2018

Star Awards Texas Builders - Best Interior Design \$1.5M - \$2M MAX Awards Best Townhome

2017

Star Awards Texas Builders - Best Outdoor Living Space Austin Business Journal Top Women-Owned Business

2016

Austin Business Journal Top Women-Owned Business Austin Business Journal Top Custom Homebuilder
MAX Awards Best One of a Kind Townhome

2015

Austin Business Journal Top Women - Owned Business Austin Business Journal Top Custom Homebuilder
MAX Awards - Best Overall Community for a Developer
MAX Awards - Best Design Product - \$400,000-\$499,000
Cliffside Cottages at The Reserve at Lake Travis

2014

MAX Awards Best Product Design - 314 Ridgewood Road MAX Awards Best Product Design
The Cabins at The Reserve at Lake Travis
Modern Home Tour Austin - 314 Ridgewood Road
Austin Cool House Tour - 1702 S 6th Street, Austin, Texas

2013

NAHB, National Green Builder Custom Home
Honorable Mention - 314 Ridgewood Road
MAX Awards - Best Overall Community, The Reserve at Lake Travis

2012

Star Awards - Best Green Remodel, Brode Residence Residential Real Estate Awards - The Reserve at Lake Travis MAX Awards - Best Green Remodel, Brode Residence

2011

Max Awards - Best Overall Community,
The Reserve at Lake Travis Star Awards - Best Poolscape,
The Reserve at Lake Travis
Star Awards - Best Overall Community,
The Reserve at Lake Travis
Max Awards Best Green Home- Best Whole House Renovation
Max Awards - Best Outdoor Living Space,
Priced Over \$100,000

2009

Max Awards - Best Remodeled Project
Priced \$150,000 - \$200,000
Max Awards - Best Kitchen Remodel

2008

Austin Business Journal's Best Real Estate Awards
Master Planned Community, The Hollows

2003

Austin Business Journal's Best Real Estate Awards, Nomination,
Multifamily Project - Rosemount at Oak Valley National Association of Local Housing Finance Agency
Best Project Awarded, Rosemont at Oak Valley, Austin, Texas

2000

National Association of Local Housing Finance Agency
Best Project Awarded, Southwest Trails, Austin, Texas

1999

First Affordable Housing West of Mopac
Southwest Trails, Austin, Texas
First Project Completed in the City of Austin S.M.A.R.T Housing Program - Southwest Trails, Austin, Texas Best Real Estate Awards Runner Up -
Multifamily project of the Year



**"The greatest pleasure is to complete a project that exceeds expectations-an
example of how we can assist families achieve their dreams."**

**CRAIG ALTER
MANAGING DIRECTOR**

CRAIGA@LEGACYIMPACTHOUSING.COM | 512.563.3225 | 3101 BEE CAVE RD, STE 305 AUSTIN, TX 78746 | LEGACYIMPACTHOUSING.COM
LEDGESTONEDEVELOPMENTGROUP.COM | LEGACYDCS.COM | LEGACYMCS.COM | BREWERDESIGNSTUDIO.COM

Cass Brewer

Legacy Companies

cassbrewer@legacydcs.com

Summary

- Experienced since 1991 in managing large and small development and construction projects that include large club and resort facilities, upscale single-family developments, and luxury and affordable multi-family housing.
- Thoroughly knowledgeable of all phases of the development and construction-management process from concept development through site selection and acquisition, design, permitting, build out, marketing, and sales.
- Proven ability to bring large, complex projects to completion on time and within budget; consistent record of profitability as developer and third-party contractor.
- Strongly committed to customer service and satisfaction; record of business success is complemented by successful experience in city government.

Specialties

Product development, entitlement, vast construction knowledge in both residential and commercial projects

Experience

Principle at Legacy DCS and Legacy MCS

2008 - Present

President

Launched and operate a firm providing a broad range of development-consulting and construction services. Company has quickly earned a reputation for creativity and innovation in design and quality in construction. We are located in 8 master planned resorts communities across Texas and growing. We build Single family and multifamily projects. We have been recognized for being one of Austin's top Custom homes builders for many years and our communities have been ranked the best places to live. To date the Legacy Companies have completed over \$400,000,000 in new home construction between single family, townhomes and condos.

Vice President Construction and Construction Services at Centex Destination Properties

February 2004 - January 2008 (4 years)

Managed construction and participated in all project-development decisions from

conceptualization through build-out, marketing, and sales. Was first of six partners to launch a resort vision and master plan that yielded three outstanding, commercially successful, and critically acclaimed properties that included stand-alone residences, condominiums, and club resorts. Directly supervised the work of more than 40 project managers, superintendents, estimators, purchasers, and administrative staff. Single-family homes ranged in value from \$450,000 to \$800,000; condominiums valued at \$280,000 to \$750,000.

Major Projects

- Point West–Galveston: 2000 units entitled, 750 units sold and built.
- The Waters: 325 units entitled, 200 units built. Seven story buildings – concrete and structural steel.
- The Hollows: 1700 units entitled, 400 units built.

Achievements

- Grew the unit from scratch to more than 140 employees.
- Conducted market analyses and participated in site selection

Senior Project Manager Austin and Houston Markets at Southwest Housing

September 2001 - February 2004 (2 years 6 months)

Recruited to open the first out-of-town office and all development and construction in Houston and Austin for a fast-growing tax credit builder.

Major Projects

- Pleasant Valley Villas–Austin, 80-duplex subdivision.
- Pleasant Valley Multifamily–Austin, 120 units.
- Pleasant Valley Courtyards–Austin, 163 units.
- Heatherwilde Villas–Pflugerville, 256 units.
- Primrose at Shadow Creek–Austin, 180 units, Senior Living.
- Primrose Skyline–Houston, 280 units, Senior Living.

Achievements

- Grew the division to 10 people managing approximately \$120 million in HUD development and construction contracts.

Project Manager at C.F. Jordan Companies

January 1996 - September 2001 (5 years 9 months)

Began employment with this major developer of multifamily housing as a field superintendent and was promoted to project manager within two years. Had overall responsibility for bidding, buyout, and construction as a third-party contractor for developers from all over Texas.

Major Projects

- Bristol Park at Encino Commons—San Antonio, 324 units.
- Southwest Trails at the Park—Austin, 160 units.
- Lake Side Villas—Houston, 186 units.
- Trails at the Park—Austin, 200 units.
- Melrose Student Housing Phase II—Austin, 204 units.
- Waterford Senior Living—San Antonio, 120 units.
- Melrose Student Housing—College Station, 348 units.
- McNeil House—Austin, 192 units.
- Palazzo Apartments—San Marcos, 152 units.
- Homestead Village Motel—Austin, 133 units.
- Monterey Ranch Apartments—Austin, 456 units.

Achievements

- Employee with Best Customer Relations Awards, 2 consecutive years.
- Generated 70% repeat business.

Education

Texas State University-San Marcos

BS, Urban and Regional Planning, 1991 - 1996

Honors and Awards

Jonestown City Council - 4 year term

Served as Alderman from May of 2003 – till Dec. of 2006

Served as Mayor from 12-06 to 5 – 07

Coached soccer from 2008 to 2014

Active in Scouts and served as a Den Leader 2008 - 2013

Awards

2008 Best Real Estate Awards - Master Planned Community – The Hollows – (Austin Business Journal)

2003 Best Real Estate Awards - (Nominated) multifamily Project Rosemont at Oak Valley (Austin Business Journal)

2003 Special Achievement Award by the Texas Association of Local Housing Finance Agencies (TALHFA) Rosemont at Oak Valley –Austin, TX

1999 Runner up - Best Real Estate Awards - Multifamily project of the Year – (Austin Business Journal)

Best Project Awarded by the National Association of Local Housing Finance Agencies – NALHFA – www.nalhfa.com

2000 – Southwest Trails – Austin Texas

2003 – Rosemont at Oak Valley – Austin Texas

Interests

Outdoor sports, hunting, fishing, softball, and all things water

Recommendations

"I have had the pleasure of working with Cass Brewer on two different occasions in the last twelve years. He is without question the most resourceful construction professional I have ever worked with. He has a passion for the construction business and I have seen him on numerous occasions "will" himself and his team to success when faced with enormous challenges. Cass is fiscally responsible, ever mindful of scheduled completion dates, and has a tremendous loyalty from the subcontractor community. What truly sets Cass apart from other construction professionals is his intimate knowledge of the real estate business, which allows him to converse with developers, designers, and financial professionals."

— **Tim Welsh**, *VP Development & Ops, Terramesaresorts*, worked directly with Cass at Legacy

"Cass is a dynamo, with an incredible focus on achieving a win/win solution. He is totally focused on achieving results that result in wildly happy customers, and doing the right thing as a business owner. I would work with, for or hire Cass at any and every opportunity, his energy, integrity, and focus are world class."

— **Rudy Sharp**, *Area Manager Central Division - Hospitality, Centex Destination Properties*, worked directly with Cass at Centex Destination Properties

"Cass is an extraordinarily talented, hard driving construction management professional. He managed hundreds of millions of dollars worth of construction from ranging from single family residences, large resort amenity centers to multiple mid-rise condo buildings including concrete frame, steel and wood frame construction. He continually drove down construction cost through value engineering and creative contracting methods that yield the company huge cost savings. Cass is well able to handle any size project including both horizontal and vertical construction."

— **Doug Mueller**, *Director of Planning, Centex Destination Properties*, worked directly with Cass at Centex Destination Properties

"The following is a letter of recommendation for Cass Brewer as a builder. Cass built and lived in our Jonestown lake house prior to our purchasing it. The house is as solid as can be and the quality and attention to detail was excellent. He actually completed the lower level of the house just prior to our closing and

followed up on very detail even after the house had closed. I have not seen many quality builders who are both honest and do what they say they are going to, but Cass is definitely one of the good ones. He was previously VP of construction for the Centex homes and was responsible for the Hollows resort, among other things, so his background is impressive. I did not know Cass prior to our purchase of the Jonestown house, but I have been very impressed with him and would like to offer this letter of support as he begins his new construction business.”

- **Daryl Ostrander**, Sr VP Advanced Micro Devices (retired)

Carrie Brewer
carriebrewer@legacydcs.com
3101 Bee Cave Road, STE 305, Austin, TX 78746
512-964-0771
LegacyDCS.com, Ledgestonedevelopmentgroup.com,
Brewerdesignstudio.com

Objective

To create beautiful, innovative, inspiring environments where people can thrive.

Education

Trinity Valley College

- Business Major and captain of dance team

Texas State

Elementary Education and interdisciplinary studies

- Teacher for 5 years grades k-5
- Trail program of integrated education 3 years

Experience

GRW studio | Bastrop | 1984-1986

- Administrative assistant restoring main street Bastrop
- Assisted in documenting design documentation
- Assisted in owner running for city government position platform

Austin Ventures | Downtown Austin | 1990-1993

- Secretary to Partner eliminating possible venture firms
- Marketing of strategies for future business

Bastrop Elementary Teacher | Cedar Creek Elementary

Lago Vista Elementary Teacher | Lago Vista Elementary

Cedar Creek Elementary Teacher | Eanes Independent School District 1993-2000

The Reserve at Lake Travis

- Define community vision, concept, architecture oversight, charrette process, selections and sales collateral, marketing materials for web-site and descriptions. Swim up bar and lazy river, Cottages, Villas, Cabins, Amenity Center Barn, Treehouses, Parade of home, Land Plan for community, Site plan, Community amenities, Welcome Center for sales and employees.

Westside Landing

- Define community vision, specifications, type of program for selling homes, concept, architecture oversight, materials, charrette process, selections and sales collateral, marketing materials for web-site and descriptions. Homes and amenities with 5 floor plans and elevations.

Summit Rock

- Two communities. Two sets of floorplans. Define community visions, concept, architecture oversight, charrette process, selections and sales collateral, marketing materials for web-site and descriptions.

Gravity, ATX

- Define community vision, focus group, logo development and community definition, concept, architecture oversight, charrette process, selections and sales collateral, marketing materials for web-site and descriptions. Amenities and furniture.

Station, ATX

- Define community vision, focus group, logo development and community definition, concept, architecture oversight, charrette process, selections and sales collateral, marketing materials for web-site and descriptions. Amenities and furniture.

CRAIG B. ALTER

11908 Preserve Vista Terrace
Austin, TX 78738

craig@thealters.net
(512) 563-3225

Multifamily and real estate development executive offering leadership, passion, and integrity to enhance tax credit and affordable housing production.

Achievements

- Affordable housing expert – developing more than 6,000 apartment units.
- Leadership experience in non-profit, public, private, and publicly traded organizations.
- Innovative design and community impact recognition through local, state and national awards.
- Effective communicator and business advocate securing difficult project approvals.

Qualifications

Legacy Impact Housing, tax credit and affordable housing development
Managing Director, 2021 - Present

Commonwealth Development Corporation, tax credit multifamily development
Vice President, 2017-2021
Ranked #11 2019 affordable housing development company in the U.S.

Delphi Affordable Housing Group, tax credit multifamily development
Vice President, 2014-2017

Housing Authority of Travis County & Strategic Housing Finance Corporation, public corporations
Executive Director, 2009-2014

Incisive Ventures, single family residential community development
Principal, 2007-2009

Centex Destination Properties, resort development & home construction
Vice President and Manager of Development & Operations, 2005-2007
A Fortune 250 publicly traded company.

Southwest Housing, Inc., tax credit multifamily development
Vice President, 2002-2005

Foundation Communities, non-profit affordable housing development
Development Director, 1998-2002

Demonstrated Skills & Abilities

- Source land, seek entitlements, and develop new construction and historic adaptive re-use family and elderly apartments.
- Secure FHA 221d4, Freddie Mac, and bank mortgage/construction loans; private activity bonds, 501(c)(3) bonds, and state agency program funds; 4%, 9%, and state and federal historic tax credits.
- Perform financial feasibility analyses; structure project sources and uses; run financial modeling; and negotiate debt, equity, and soft funding terms.
- Manage design professionals, legal teams, and construction contractors.
- Create partnerships with public entities; housing authority, housing finance corporation, and non-profit partnerships utilizing tax credits, private activity bonds, land leases for property tax exemptions, and HUD's RAD program.
- Prevented Housing Authority HUD receivership due to insolvency; increased net revenue from (\$225K) to \$548K surplus.
- Issued private activity bonds for and formed public-private partnerships to develop 1,496 affordable apartment homes.
- Directed planning and development for 1,200 and 1,500-acre master planned second home resorts and seven-story condominium infill projects.
- Managed \$152MM land development budget and \$47MM condominium construction budgets.
- Tripled condominium starts and sales above annual plans.
- Land planning, subdivision development, real estate appraisal, expert witness, public agency project review, custom home building.
- Personnel selection, evaluation, education, and oversight.

Education

The University of Michigan, Ann Arbor, MI

- Masters Degree in Regional Planning
- Bachelor of Science in Natural Resources Management

Craig Alter
Recent Project Development List

Southern Commons, Oklahoma City, OK

Senior Housing, 97 apartments, 9% LIHTC and state tax credits, Freddie Mac

Avenue Commons, Andrews, TX

Family Housing, 60 apartments (10-market rate), 9% LIHTC tax credits, HUD 221d4

Commons at St. Anthony's, Amarillo, TX

Senior Housing, 124 apartments, adaptive reuse, 9% LIHTC and federal and state historic tax credits, Freddie Mac

THRIVE, Oklahoma City, OK

Senior Independent and Assisted Living, 316 apartments, 4% LIHTC and project based vouchers, private placement mortgage, (approvals, funding, and plans conveyed to Oklahoma City Housing Authority)

Dunbar Commons, Oklahoma City, OK

Senior Housing, 52 apartments, adaptive re-use, 9% LIHTC and federal and state historic tax credits, conventional bank mortgage

Stone Hill, Edmond, OK

Family Housing, 200 apartment, 4% LIHTC (pre-development stage), HUD 221d4

87th, Odessa, TX

Family Housing, 181 apartments, 4% LIHTC and project based vouchers, HUD 221d4

Casas Del Rio, Del Rio, TX

Family Housing, 170 duplex units, 4% LIHTC-RAD conversion, HUD 221d4

Sundance Meadows, Brownsville, TX

Family Housing, 132 apartments, 9% LITHC, HUD 221d4

Legacy @ 87th, Odessa, TX

Family Work Force Housing, 216 apartments, Petroleum Strategic Partnership (equity), Freddie Mac mortgage (not started due to COVID-19 impact on oil production)

Forest Park, Austin, TX

Family Housing, 228 apartments, acquisition/rehab, 4% LIHTC, HUD 221d4 (partnership with Strategic Housing Finance Corporation)

Silver Springs, Austin, TX

Family Housing, 360 apartments, 4% LIHTC, HUD 221d4 acquisition/rehab (partnership with Strategic Housing Finance Corporation)

Paddock at Norwood, Austin, TX

Family Housing, 228 apartments, 4% LIHTC (partnership with Strategic Housing Finance Corporation)

Parmer Place, Pflugerville, TX

Family Housing, 252 apartments, 4% LIHTC, HUD 221d4 (partnership with Strategic Housing Finance Corporation)

William Cannon Apartments, Austin, TX

Family Housing, 252 apartments, 4% LIHTC, HUD 221d4 (partnership with Strategic Housing Finance Corporation)

Parker Lane Apartments, Austin, TX

Senior Housing, 72 apartments, 9% LIHTC, bank conventional mortgage (developed and owned by Strategic Housing Finance Corporation)

Cambridge Villas, Pflugerville, TX

Senior Housing, 200 apartments, 9% LIHTC, bank conventional mortgage (developed and owned by Strategic Housing Finance Corporation)

Past Affordable Housing Development

Southwest Trails, Austin, TX - 160 apartments, family, 9%

Trails at the Park, Austin, TX - 200 apartments, family, 9%

Vintage Creek, Austin, TX - 200 apartments, family, 501c3 Bonds

Garden Terrace, Austin, TX - 84 room SRO nursing home conversion, mixed finance

Moore Senior, Austin, TX - 225 apartments, senior, 9%

Rosemont at Hidden Creek, Austin, TX - 250 apartments, family, 4%

Rosemont at Oak Valley, Austin, TX - 280 apartments, family, 4%

Rosemont at Heather Bend, Pflugerville, TX - 248 apartments, family, 4%

Rosemont at Williamson Creek, Austin, TX - 163 apartments, family, 9%

Rosemont at Garth, Baytown, TX – 250 apartments, family, 4%

Primrose Casa Bella, Houston, TX - 286 apartments, senior, 4%

Primrose Skyline, Houston, TX - 280 apartments, senior, 4%

Primrose Del Sol, Houston, TX - 248 apartments, senior, 4%

Primrose at Pasadena, Pasadena, TX - 240 apartments, senior, 4%

Primrose at Heritage Park, Houston, TX - 210 apartments, senior 4%

Other Residential

Waters at Horseshoe Bay, Horseshoe Bay, TX 327 mid-rise resort condominiums (for sale luxury second homes)



TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS

www.tdhca.state.tx.us

Greg Abbott
GOVERNOR

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Ajay Thomas, *Member*
Sharon Thomason, *Member*

May 28, 2021

Writer's direct dial: 512-475-1676
Email: marni.holloway@tdhca.state.tx.us

Mr. Craig Alter
11908 Preserve Vista Terrace
Austin, Texas 78738

RE: REQUEST FOR EXPERIENCE CERTIFICATE UNDER 2021 QUALIFIED ALLOCATION PLAN

Dear Mr. Alter:

We have reviewed your request for an experience certificate, which is provided to individuals that meet the requirements of §11.204(6) of the 2021 Qualified Allocation Plan. In order to meet the experience requirements an individual must establish that they have experience in the development and placement in service of at least 150 residential units. We find that the documentation you have provided is sufficient to establish this required experience. Additionally, you have certified to compliance with the requirements of §11.204(6)(B), including the following requirements:

(ii) Experience may not be established for a Person who at any time within the preceding three years has been involved with affordable housing in another state, in which the Person or Affiliate has been the subject of issued IRS Form 8823 citing non-compliance that has not been or is not being corrected with reasonable due diligence. ...

(iv) Notwithstanding the foregoing, no person may be used to establish such required experience if that Person or an Affiliate of that Person would not be eligible to be an Applicant themselves.

Should you choose to participate as a member of the Development Team or an individual providing experience for any Application submitted for funding, a Previous Participation Review (10 TAC §1.5) may be conducted prior to any award of funds. Additionally, should it be determined at any point in time that the information provided in your request for experience is fraudulent, knowingly falsified, intentionally or negligibly materially misrepresented, or omits relevant information, this certificate of



experience is null and void and you may be subject to other sanctions under the Texas Department of Housing and Community Affairs' rules and requirements.

If you have any questions or concerns regarding this certificate or the experience requirements, please contact Marni Holloway at marni.holloway@tdhca.state.tx.us.

Sincerely,

Marni Holloway
Director of Multifamily Finance

EBH

JACK JOHANNESMEYER JR., M.B.A., C.P.A

518 Sunset Dr, Ponte Vedra Beach, Florida 32082 (407) 340-7276 jackjohannesmeyer@gmail.com

CFO • SENIOR VICE PRESIDENT STRATEGIC PLANNING

Dynamic MBA Financial Leader with two decades of experience leading complex finance and operations teams supporting the strategic vision of multi-billion dollar publicly traded organizations. Both Top and Bottom-line focused professional who reengineers processes to create significant value. Expert in dramatic turnarounds, bringing underperforming business units to profitability. Visionary leader who builds world-class teams, and effectively mentors talent. Keen focus on developing strategies to grow sales and gain market share.

Areas of Expertise

Business Intelligence • Budgeting and forecasting • Cost/Benefit Analysis • Credit • Expense Control • Financial Analysis • Internal Controls • IT and Systems Management • M&A • Logistics • Process Improvements • Cash flow Management • Financial Modeling • Change Management • Restructuring • Real Estate Asset Management • Start Ups/Turnarounds • Strategic Planning • Team Leadership/Motivation • Vendor Relations • Operations Management • Needs Assessment • Business Development • Negotiations • Market Analysis • Sales Forecasting • Compensation and Workforce Planning • Working Capital Financing

PROFESSIONAL EXPERIENCE

Chief Financial Officer & Chief Acquisitions Officer Legacy Companies, Austin, TX 2017-current

Oversees Accounting department, budget preparation, and audit functions. Works with all Legacy companies department heads to monitor each department and make recommendations. Directs the preparation of all financial statements, including income statements, balance sheets, compares sales and profit projections to actual figures and budgeted expenses to actual expenses; makes or oversees any necessary adjustments to future projections and budgets. Reviews planning process and suggests improvements to current methods. Analyzes operations to identify areas in need of reorganization, downsizing, or elimination. Works with the President and partners to coordinate planning and establish priorities for the planning process. Studies long-range economic trends and projects their impact on future growth in sales and market share. Identifies opportunities for expansion into new product areas. Oversees investment of funds and works with investment bankers to raise additional capital required for expansion.

BAKER DISTRIBUTING COMPANY, Jacksonville, FL 2010 - Jan 2017

Large publicly traded wholesale distributor, fully owned subsidiary of WATSCO (WSO)

Senior Vice President of Strategic Planning and Business Development August 2016 - 2017

Primarily focused on the Strategic side of the business working with President and Divisional Leadership to drive Sales and Earnings growth. *Provide* executive management with insight into the financial implications of and recommendations to strategy. In charge of Baker's Branch Expansion efforts and acquisition strategies and targets. Oversee the Marketing, Ecommerce, Pricing, Product Management, Business Development, Acquisition, and new technology initiatives.

Chief Financial Officer and SVP Baker Distributing November 2010 - September 2016 Lead all Finance, Accounting, IT, Business Intelligence, Credit, Real Estate, and Pricing efforts for Baker (8 Direct Reports, and 250 employees) with full P&L responsibility. Oversee Preparation of all budgets, forecasts, and strategic plans. In charge of Baker's Branch Expansion efforts and acquisition strategies and targets. Review and Manage with Division Presidents all salespeople their performance, compensation plans, and hire/ termination decisions.

- Over the Past 3 Years lead company in growing sales 25% and earnings almost 70%
- Reduced lease expense by 20% thru renegotiations and strategic early renewals.
- Redesigned all compensation plans in 2015 to emphasize and reward growth.
- Developed a sales target tracking system to enable the sales managers to established specific targets by salesperson and automatically track results.
- Created detailed annual budgets for the first time from the bottom up working with each Divisional President to establish individual branch budgets (220 branches).
- Established a separate real estate company within Baker to capture real estate commissions for the company instead of paying 3rd party brokers.
- Negotiated a more favorable financing deal with a GE Capital resulting in savings of \$750k annually.
- Integrated the sales and credit teams to leverage one another in managing our customer data for more focused

and effective marketing campaigns.

- Created Line of Business reports and incentive comp to align with our senior management structure.
- Key contributor to companywide reorganization, resulting in a leaner, more sales focused structure.
- Created new Business Analytics team, applying data from our business intelligence software to measure and analyze our business, has greatly increased visibility into customer and product behavior and performance.
- Upgraded and increased the number of professionals in the pricing department allowing us to establish better customer pricing profiles, trade prices, and quickly identify margin erosion resulting in 3 consecutive years of selling margin increases.
- Signed Company up in 2014 to a new vendor payment card system resulting in significant rebates from our card company, audited our telecom spend to uncover large savings, and renegotiated our trash contracts resulting in reduced costs.

MERITAGE HOMES/ CENTRAL FLORIDA DIVISION, Orlando, FL 2007-2010

Vice President of Finance/ Operations

Oversaw all Finance functions for the Central Florida Division (\$100M in revenue and 65 employees) with full P&L responsibility, including accounting, forecasting, budgeting, financial modeling, pricing / product strategy, management of backlog, and closings. Established pricing for both inventory and spec homes. Reviewed and approved all checks, sales contracts, HUDs, and contractor agreements. Prepared all budgets, forecasts, and Pro Formas. Analyzed backlog profitability to develop accurate sales prices and hard costs. Managed advertising budget, Divisional overheads, and cycle times.

- Turned around Central FL Division from \$30M+ loss in 2008 with high overhead and overpriced lots, to 1 of most profitable company divisions with projected profit of \$6.5M in 2010.
- Slashed overhead by 50% thru consolidation of jobs, renegotiating rents, and tightening field overhead costs (including elimination of SWPP costs and discontinuing use of construction trailers), vendor negotiations, and overall operational streamlining.
- Dramatically increased cash flow through move to bi-monthly pay cycle for \$2M-\$3M float on cash.
- Developed partnership with new title providers, increasing profitability \$200K/ year.
- Developed optimum pricing strategy offsetting increased base price through higher incentives, resulting in 50% increase in sales from 2009 to 2010 despite 50% drop in overall Central FL.
- Increased sales in 7 older communities by 200% for average net cash flow of \$60K/home, providing increase in cash flow for Q1-Q2/ 2010 of \$2M, enabling redeployment of cash in more profitable deals.
- Reduced cycle time from sale to start of construction by 30 days through development of cross-functional team and redesign of process flow. Reduction in cycle time has cut interest carrying costs, accelerated cash flow, improved ROI, and enables company to sell homes for additional month with closing in same fiscal year.
- Partnered with Land Acquisition VP and identified 11 new land deals totaling \$26M, significantly increasing division revenue with result of a \$6.5M net profit in 2010.
- Contributed directly to land acquisition efforts. Identified potential land acquisitions, analyzing financial viability of deals, negotiated terms with sellers, and presenting to Corporate Land Committee for approval.

GLOBE WIRELESS, Melbourne, FL 2006-2007

Chief Financial Officer

Serving as 2nd in command, led accounting, budgeting, banking, financial reporting, materials procurement / distribution, HR, investor relations, and ship administration. Negotiated favorable vendor terms, effectively utilized banking lines of credit, and implemented appropriate customer collection controls to manage organizational cash flow. Contributed to overall strategy, including product and pricing, analysis and due diligence of potential acquisitions, and capital planning / execution. Obtained, reviewed, and selected annual health and benefit plans. Acted as sole point of contact with external auditors. Led team of 8 direct reports with total staff of 65.

- Successfully identified, underwrote, financed, and led purchase of \$9.5M competitor for significant market share capture and 35% increase in revenue.
- Renegotiated credit line increase from \$1.5M to \$5M, reducing interest rate from 9% to 6.25% providing additional capital for operational expansion.

- Slashed inventory levels by \$5M through negotiations with suppliers, improvement in inventory forecasting, and increased utilization of existing inventory system.
- Dramatically improved cash flow (\$5M-\$7M) by increasing the A/R collection cycle from 60+ days outstanding to 30. Negotiated 45-day vendor payment cycle with large satellite and equipment providers, allowing client payment before provider payment due dates. Resulting in \$5-7 million improvement in our cash position.
- Uncovered \$200K in tax incentives from City of Melbourne and Brevard County for job creation and facility expansion. Successfully spearheaded initiative, and met repeatedly with city and county commissioners.
- Cut Health Insurance Costs by \$350K/year.
- Brought accounting books into compliance with GAAP resulting in clean audit opinions for fiscal years 2005/2006 and reduction of interest rate charged by our bank of 100 basis points.
- Reviewed accounting and reporting system infrastructures, interfaced accounting systems with GL, and improved month-end close and consolidation processes.
- Partnered with legal counsel in large shareholder stock issue transaction, including analysis of tax effects and regulations on potential recapitalization.

ALLETE PROPERTIES, Fort Myers, FL 2005-2006

Local development company that bought and developed raw land for sale

Chief Financial Officer

Developed / executed business strategy to achieve year-over-year growth through acquisitions and business development. Proposed new business strategies including lot development, vertical construction, wetland mitigation banking, and income producing property investment. Created and maintained all land acquisition financial pricing and feasibility models; designed and implemented disciplined, fact based acquisition process and expanded due diligence requirements for land acquisitions. Managed all budgeting / forecasting. Liaised with external auditors and corporate audit committee to ensure that compliance with Sarbanes/Oxley requirements and GAAP accounting followed. Maintained strong control environment. Directed internal/ external SEC reporting.

- Saved \$1.75M through use of 1031/1033 exchanges.
- Refinanced \$15M note on owned shopping center for 200 basis point reduction in interest rate and a \$300K reduction in interest/year.
- Spearheaded initiative to use CDD Financing to develop and construct infrastructure for DRI project in Ormand Beach resulting in greatly reduced financing costs.
- Developed detailed financial modeling tools to better analyze potential investment opportunities.

PULTE HOMES LOCATIONS, Orlando, FL 2004 - 2005

National leader in home construction

Florida Regional Controller

Led financial operations for 6 FL markets, with focus on high-level financial analysis. Determined feasibility, financial viability, and strategic fit for all deals. Reviewed capital spending by market. Prepared executive reports on sales, gross margins, overheads, house costs, ROI, and profitability. Maintained all Florida Area Overhead accounting including monthly close, and preparation/ analysis of financial statements. Prepared monthly recap by Market to Area President, highlighting key financial goals, trends, performance milestones, and shortfalls.

HILTON GRAND VACATIONS COMPANY, Orlando, FL 2002-2004

Leading operator of timeshare resorts with properties California, Canada, Colorado, Florida, Hawaii, Mexico, Nevada, New York,

Senior Finance Manager - Budgeting, Strategic Planning & Financial Analysis

Consolidated and reviewed annual operating and capital budgeting plans. Reviewed all development Pro Formas, including cash flow projections for new projects. Utilized IRR, NPV, and other financial measurements to prioritize potential projects and manage investment strategies. Prepared organization-wide 5-year capital cash flow schedules. Conducted all GAAP financial accounting research.

- Developed 1st 5-year plan in organization history enabling more accurate forecasting capital needs.

WALT DISNEY COMPANY, Orlando, FL 1995-2002

Finance Manager - Financial Planning & Reporting

Directed team of 18 analysts providing executive leadership with global financial statement reporting and analysis. Reviewed / consolidated annual operating budget and monthly forecasts. Managed G/L maintenance and review of accruals. Led month-end *close* processes. Managed balance sheets, reconciled accounts, and created / reviewed cash flow statements.

- Developed tax strategy resulting in \$1M in tax savings/year

Manager - Internal and Management Audit

Directed department reviewing company-wide business operations to ensure proper controls and operating efficiencies achieved.

- Identified and pursued company-wide cost saving initiatives.

EDUCATION

Crummer School of Business/Rollins College, Winter Park, FL

MBA, Finance, GPA 3.97, Top of Class of 50

University of Florida, Gainesville, FL

Masters in Accounting

Bachelors in Accounting

Victoria Pitts, Vice President of Finance

Victoria comes to the Legacy family of companies with a set of skills gathered over a multitude of diverse industries. Her career started in the motion picture camera business, and she successfully worked through the household goods sector in Canada. A family move brought her to Austin, Texas where she joined Taylor Morrison, ranked the sixth largest homebuilder in the US. Through public sector reporting exposure, Victoria has been trained in the importance of process and procedure, and also the need for effective and efficient reviewing and combining financial data, and streamlining reporting policies and packages. Victoria has reorganized and rejuvenated the Legacy accounting department over the last year. She now brings to Legacy Impact Housing, a passion for financial efficiency, and a desire to experience the joy in giving back to her community by being part of an organization that helps others rise.

Education

University of Western Ontario, Canada

Bachelor of Administrative & Commercial Studies: Financial
Administrations & Economics

DeVry University

Master of Business Administration

08.02.2021 _ Mark Odom Studio

3811 Tannehill Lane _ “Common Grounds”

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01

STATEMENT OF UNDERSTANDING

Mark Odom Studio is very pleased to have the opportunity to be a part of the team for the 3811 Tannehill Lane RFP, we're referring to as "Common Grounds". It is our understanding that our role, within the team, will be to act as the lead Architect of Record qualified to design, document, and coordinate the entire design team through construction. It is also our understanding that this project will be 100% affordable with a focus of cultivating a familiar community culture and social identity that is comfortable for all to enjoy.

The scope of work could potentially include: Site Analysis and feasibility studies for various schemes. Full architectural services, permitting and bidding negotiations, assisting in selection of general contractors/consultants, construction administration, and material specifications.

Together, we present a skilled team of architects and designers who have experience in maintaining the importance of interior and exterior environments. We will deliver a site-specific approach that will work with *and* enhance existing components while introducing new programs and interior atmospheres with your story as the driver. Sensitivity to those needs will not overshadow the importance of schedule and budget.

We have a deep understanding of unique product types and are confident with our ability to deliver a contextually-appropriate project that will successfully tell the story of Common Grounds and the opportunities we hope to create.

Best Regards,



Mark Odom, AIA, NCARB
Principal - Mark Odom Studio

02

STUDIO INTRODUCTION

Mark Odom Studio is a full-service architecture and interiors firm with offices located in Austin and San Antonio. At m(ødm), our team's experience ranges from architecture & interior design to master planning and construction administration. We have the ability to take projects from conception to built form by creating an initial vision, producing drawings and documentation (alongside other consultants) which explain that vision, coordinating permitting through local jurisdictions, and remaining involved through construction to ensure project intent is executed with exceptional craft and care.

We are comprised of a core group of creative problem-solvers who approach each project independently with attention to the unique aspects of program, site, and the client's goals. We are a dedicated team known for our client commitment and the personal level of service we provide for each of our projects. If selected, together with our project team, we will be available to fully staff and support the project with a passionate group of design professionals.

Mark Odom Studio believes that every project generates its own set of specifics and as such, our approach as an office must always be free of preconceived ideas, allowing every design response to reinforce specific client personality, site, materials, movement, and engagement. Our strength has arisen from our ability to generate solutions that aren't necessarily the product of "the way it's always been done," but instead creatively engaging client needs, site, and context. We seek out clients willing to place a value on story and exploration, beyond the standard, and we see the Common Grounds as an opportunity to develop solutions unique to our local, East Austin, built environment.

STUDIO CONTACT INFORMATION

Mark Odom Studio
1009 W. 6th Street, Suite 50
Austin, TX 78703
512.469.5950
markodomstudio.com

Principal Contact: Mark Odom, mark@markodomstudio.com

Please contact Mark Odom for any questions you may have regarding this RFP or any future contractual information. Mark Odom is authorized to sign on behalf of Mark Odom Studio.

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ARCHITECTURAL SERVICES / TYPICAL PHASES OF WORK

Our work begins with a narrative, built in collaboration with client + architect. This story sets the tone for the experience and conceptual approach to the full project and establishes an ongoing reference through each phase. We will then discuss and present conceptual architectural strategies in the Schematic Design Phase, and once approved, continue through the Design Development Phase. We will then develop and refine these ideas through details and documentation during the Construction Documentation Phase. Construction Documents will be used for bidding, permitting, and construction. We are leaders during both Permitting and Bidding, and run all needed permits through the city in house.

The following breaks down our typical phases and identifies expectations, goals, and processes per phase:

- A. FEASIBILITY (F) _ Owner's approval is necessary to proceed to next phase.
 - 1. Kick off meeting with Owner to brainstorm about site design, parking, and building placement.
 - 2. This phase will be used primarily to vet the existing site plan and prepare documents necessary for banks. Specific focus will be placed on general user experience, site plan design, parking, way-finding, amenity zones and building entry.
 - 3. Provide site plan diagram(s) for discussion with general project data.
 - 4. Site plan diagram(s) will be schematic in nature and developed in future phases upon approval.
 - 5. Project data might include: unit count, parking count, amenity types, and base unit mix.
 - 6. Buildings will remain as massing blocks only. Articulation and materiality will be in future phases.
 - 7. One (1) site meeting as needed.
- B. SCHEMATIC DESIGN (SD) _ Owner's approval is necessary to proceed to next phase.
 - 1. Kick off meeting with Owner to review concept, deliverables, budget, schedule.
 - 2. Provide floor plans and site plans based on comments.
 - 3. Provide concept(s) for building massing, articulation, and materiality.
 - 4. Provide general design concept, narrative.
 - 5. Preliminary code review with city or jurisdiction to verify code decisions, if necessary.
 - 6. Coordinate with consultants as required.
 - 7. Meeting/Collaborating with Owner for review.
 - 8. Provide schematic design package to designated contractor for pricing exercise.
 - 9. Two (2) site meetings as needed.
- C. DESIGN DEVELOPMENT (DD)_ Owner's approval is necessary to proceed to next phase.
 - 1. Provide development of design, including site plan, floor plans, lighting layout, millwork layout, finish selections, space plan/furniture layouts, shell modifications, and overall design concept.
 - 2. Provide coordination of Consultant services as necessary to produce design development documents including Civil, Structural, MEP, and Landscape.
 - 3. Meet with Owner to present design development package, consisting of scaled floor plans, elevations, key study renderings, lighting plans, product information, finish selections and infrastructure strategy. Review decisions.
 - 4. We recommend that a GC is on board during this phase for budgeting. Revisions will be made to make sure project is in budget.
 - 5. Two (2) site meetings as needed.

- D. CONSTRUCTION DOCUMENTS (CD) _ Owner's approval is necessary to proceed to next phase.
1. Prepare construction document package consisting of but not limited to: Dimensioned floor plans., Reflected ceiling plans, Elevations, sections and details, Window, door, and hardware schedules, Finish plans and legends, Final material specifications (CSI Specifications included in consultant fees).
 2. Provide coordination of Consultant services as necessary to produce construction documents.
 3. Issue construction document package to the Owner / Submit to local Jurisdiction.
 4. Submit drawings to local Registered Accessibility Specialist (RAS) as required by Texas Department of Licensing and Regulations (TDLR) for Americans with Disabilities (ADA) review.
 5. Submit drawings to the city or local jurisdiction for building permitting process.
 6. Two (2) site meetings as needed.
- E. PERMITTING (P) _ Owner's approval is necessary to proceed to next phase.
1. Coordinate building application, construction documents, and submit necessary requirements for building permit with local jurisdiction.
 2. Coordinate comments and revision submittals between consultants and local jurisdiction.
 3. Attend building permit review meetings as needed.
- F. BIDDING & NEGOTIATION (BN) _ Owner's approval is necessary to proceed to next phase.
1. Answer bidding questions and clarifications.
 2. Review and analyze bids with Owner / Builder : Maximum (3) General Contractor's during this phase.
 3. This phase is expected to parallel with prior design phases : we recommend that a GC will be budgeting as we process drawings and expect limited V/E after CD completion. Any major drawing revisions after CD's are completed will be considered at an hourly rate not to exceed.
- G. CONSTRUCTION ADMINISTRATION (CA) _ Owner's approval is necessary to proceed to next phase.
1. Issue addendum's, respond to RFI's, and ASI's as required.
 2. Issue and coordinate Consultant related revisions.
 3. Process contractor submittals.
 4. Attend all construction meetings in person or via telephone.
 5. Conduct a project "walk-through" at substantial completion to develop a punch list of items necessary to remedy before completion of work.
 6. Site visits will be 2 visits per month for 20 months.
 7. RFI / Submittal will have a (5) business day written response time.

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PROJECT APPROACH / COLLABORATIVE MANAGEMENT PLAN

We believe in working through consensus, employing “the best idea wins” attitude, knowing all parties want to successfully achieve the best product possible. Thus our methodology is always collaborative, coordinating all participants (including but not limited to the client, consultants and governing agencies) in order to maintain a transparent streamline of communication, with the goal of developing a product that goes beyond everyone’s expectations. Through working closely with our clients and team, we will discover all known and unknown goals and values, and build conceptually around those key factors in an effort to develop one overall vision. We will strive to maintain a clear schedule with careful attention to design goals and budgetary requirements, and we will clearly communicate through the process in an effort to keep all participants on track and accountable.

Throughout the design process, we maintain a direct collaboration with our clients and team through sketches, computer-generated plans/drawings, and 3D modeling. Our responsibilities involved in creating a vision will be documented through appropriate graphic and verbal communication, which will keep our team on the same page throughout design and limit surprises during construction. We are comfortable discussing progress in one-on-one meetings, via phone or email and/or over web meetings.

While we will require our Client’s participation at key points in the project, we are flexible with as much or as little involvement as the client prefers beyond that. At the beginning of any project, we will work with the Client’s team to establish a schedule of coordination and deliverables that meets project-specific requirements.

Architect / Mark Odom Studio

Mark Odom Studio, or m(ødm), is an S-Corp. Mark Odom leads the Austin and San Antonio offices and is integral to operations for all projects and transactions.

Coordination: Mark Odom Studio

A project manager would be the day-day point person. Mark Odom and Erin Nies would supervise work provided by m(ødm) employees and ensure project direction.

Internally, our office is a true studio in that all employees are aware of and, to some degree, involved in all projects. Each project is supervised by a Principal Architect, Project Manager, and typically 1-2 Project Designers. We involve our entire assigned project team in various meetings, communication, etc., rather than only the Principal Architect. As a result, we have found that our projects run much more efficiently and smoothly when we keep these lines of communication open.

Coordination: Project Consultants

Most projects require additional consultant services which include but are not limited to: Civil Engineer, Structural Engineer, MEP Engineer, Landscape Architect, Interior Designer, TDLR Consultant, Energy Consultant, Water Proofing Consultant, Cost Estimating. For the purposes of this narrative and associated chart, we assume project consultants will contract directly with our client or Mark Odom Studio.

Whether or not our clients contract with other consultants directly, or if Mark Odom Studio serves as the primary contract, we are comfortable acting as the main point of contact for coordination throughout the project.

Furthermore, we encourage communication between the GC and project consultants to filter through our office before distribution, so that we maintain coordination supervision throughout the project.

Collaboration is key to coordination, and we believe this starts at Schematic Design. Building a full project team early allows all parties to participate and contribute to decision making needed in each area of expertise.

Coordination: Governing Agencies

Mark Odom Studio will coordinate with any governing agencies and will monitor and facilitate the coordination of consultants with such agencies. Owner is responsible for permit expediter (if required), permitting fees, and any other consultants not included in this proposal.

Coordination: General Contractor (GC)

We assume our Clients will engage directly with their GC early in the process to begin understanding true costs. Mark Odom Studio is comfortable coordinating directly with the GC during design, documentation, permitting, bidding, and construction in order to streamline the building process by keeping all team members on the same page throughout the life of the project. While we would remain the point of contact with governing agencies regarding any permit issues that might occur during construction, we assume the GC and their subs/trades would communicate directly with agencies regarding inspections, etc during the construction process.

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LEGAL CONCERNS

In hopes to improve with each project, we believe in direct communication, problem solving as a group as issues arise, and learning from our mistakes. We do not claim to be error free during the process, however we do believe that we own issues and make them ours until the problem is resolved.

Project Example: AVIATOR / Mixed Use, Adaptive Reuse

Project: An adaptive reuse project at Brooks Air force Base in San Antonio, Texas with 285 multifamily units. We renovated three existing concrete structure buildings that were used as sleeping quarters into leasable apartments. Seven new free standing buildings and site amenities were designed and built to complete the unit count and site plan.

Claim Narrative: 3 years after project completion, an ADA claim was made against sidewalks and other site amenities not being code compliant. The claim has been directed to the builder, however we've been brought into the lawsuit due to the fact that the design team was contracted under our name.

Solution: The case is still ongoing and our attorneys are working alongside the Owners attorney to mediate the issue. Our insurance coverage was brought into the conversation immediately and have been coordinating efforts from their side.

THANK YOU.

We very much appreciate the opportunity to participate in this exciting project.

Who We Are

Bowman is a trusted, multi-faceted consulting firm offering a broad range of infrastructure, environmental management, energy and real estate solutions to both public and private clients across the country. From large commercial developments, to master planned communities, to local transportation projects, Bowman delivers outstanding project results, builds long-lasting relationships and leverages the growth of our organization to serve the constantly changing needs of our clients.



26

Years in Business

\$125

2020 Gross Revenue (Millions)

800

Number of Employees (Approx.)

32

Offices Nationwide

Why We're Different

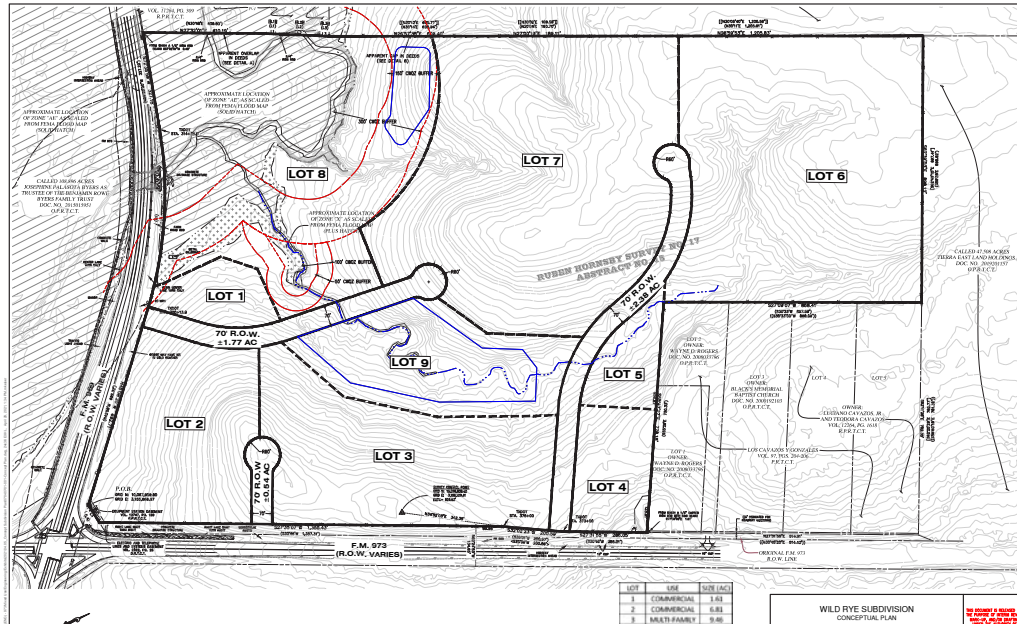
Success doesn't just happen. It's the result of thoughtful planning and focused action. At Bowman, we work with intention to deliver on-demand technical genius and industry leading talent that, when combined, produces innovative and solution-driven results. Our clients benefit from a balance of deep national resources often associated with large firms, and the flexibility and quick response associated with smaller boutique firms, to effectively navigate through intricate approval processes.

Markets

- Commercial & Industrial
- Education
- Government Services
- Healthcare & Senior Living
- Mining & Exploration
- Mission Critical
- Multi-Family/Mixed-Use
- Power & Energy
- Parks & Recreation
- Residential
- Retail
- Transportation
- Utilities/Environmental Infrastructure

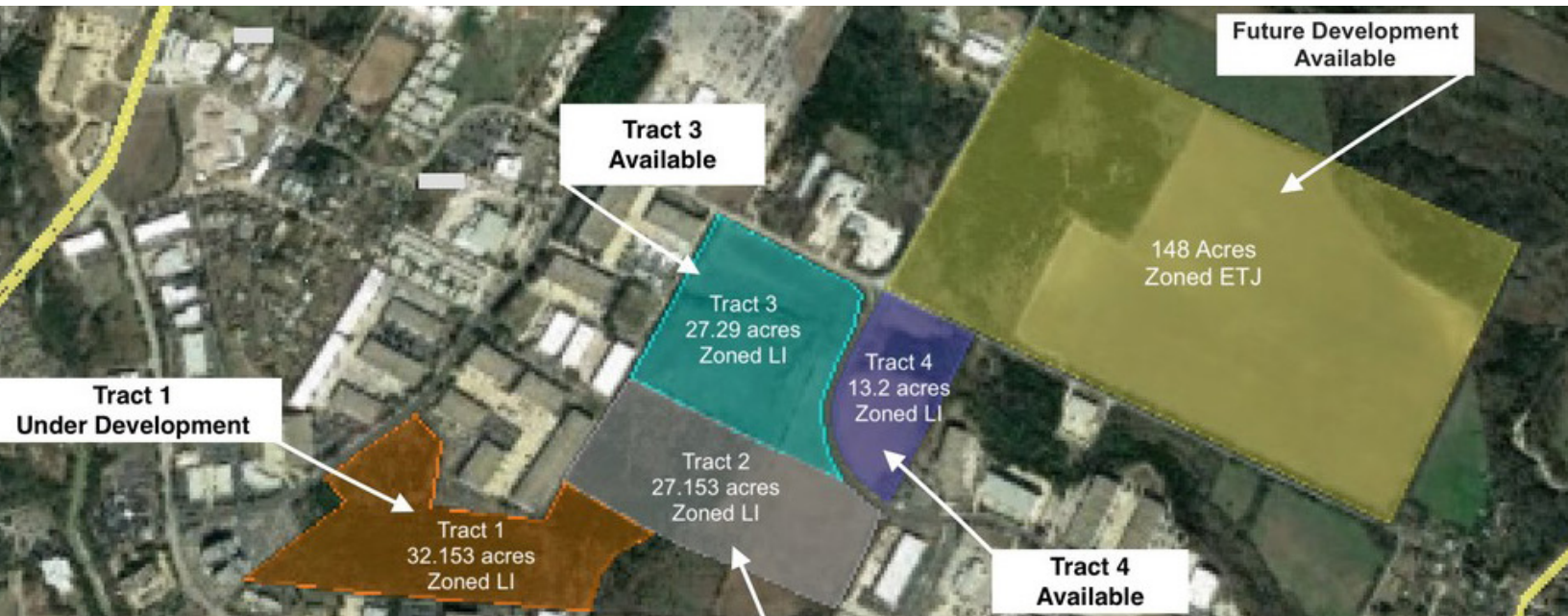
Services

- Multi-Disciplinary Engineering
 - Civil
 - Transportation
 - Mechanical, Electrical, Plumbing
 - Structural
- Surveying/Geospatial
- Right-of-Way & Land Services
- Water/Wastewater
- Landscape Architecture & Planning
- Construction Management
- Environmental Consulting
- Peer Review/Third Party Code Review
- Commissioning
- Arc Flash Analysis



Tuscany Park Tract 3 & 4

Austin, TX



Client

Dalfen Industrial LLC

Services Provided

Civil Engineering
Survey
Grading & Drainage Plans
Water/Wastewater
Floodplain Study
Hydraulic Model
Environmental Consulting
City of Austin Permitting
Travis County Permitting
Construction Administration

Description

Bowman provided design and engineering of three industrial buildings on Tuscany Way. The project included site improvements for access, utilities, parking, environmental protection, and drainage facilities. This project also included extending water and wastewater mains along Tuscany Way to provide connections to the proposed buildings.

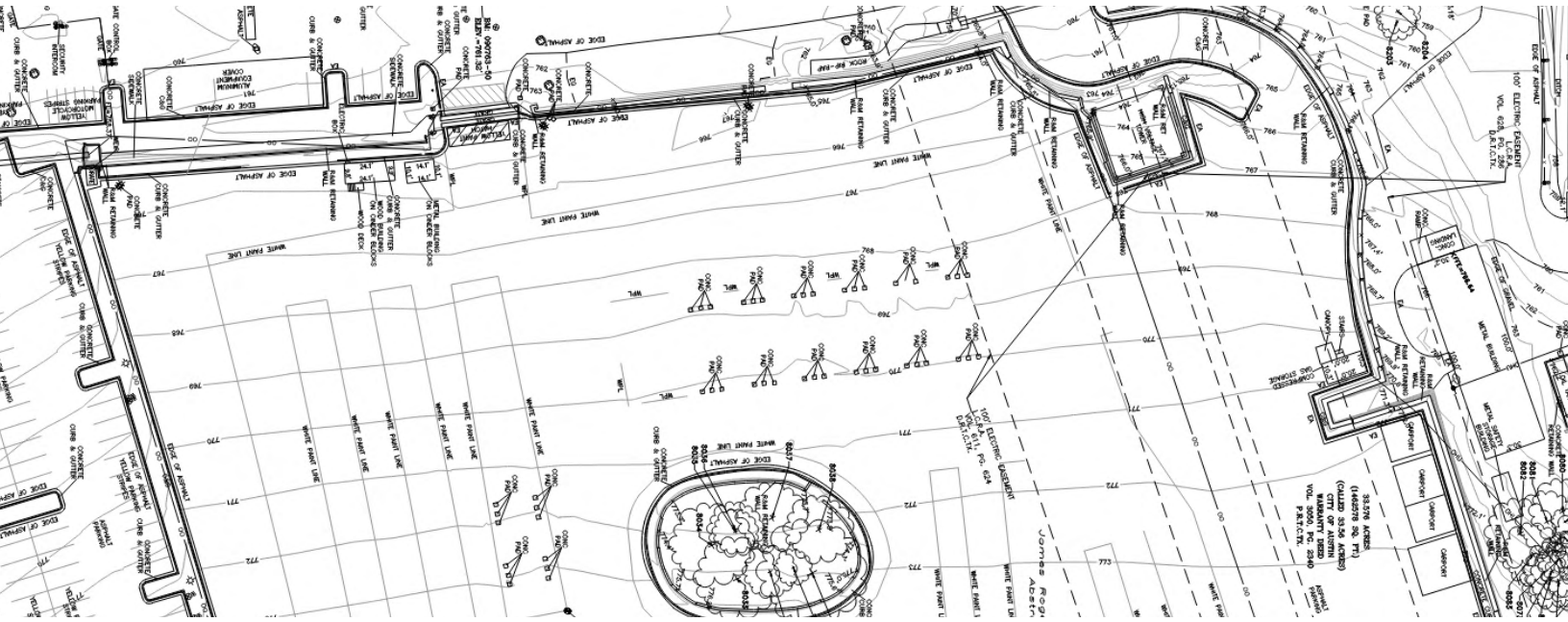
The project includes a 72,000 and 202,248-square foot industrial building and surface parking and other required infrastructure for "Tract 3", a 27.29 acre parcel located in the southwest corner of Tuscany Way and Ferguson Lane. In the southeast corner, the 13.28-acre "Tract 4" parcel was proposed to feature a 101,200-square foot industrial building, also with surface parking and other required infrastructure.

All three buildings were encroaching into a tributary of Walnut Creek, a 100-year floodplain. As a result, Bowman performed a study to revise both the existing City of Austin hydraulic model and floodplain. The proposed earthwork was designed to maintain the floodplain storage volume, prevent additional adverse flooding on other properties, and preserve the natural, traditional character of the waterway.

Bowman's services included: land status determination, existing conditions plan and tree survey, erosion & sediment control plan, dimensioned site plan grading and drainage plan, existing and proposed conditions, floodplain mapping, drainage area maps, water quality pond plans & details, detention pond plans & details, site utility plan, Austin Water Utility approval sheet, Traffic Control plan, environmental consulting, and construction administration.

Kramer Lane Substation

Austin, TX



Client

Austin Energy

Services Provided

Civil Engineering
Surveying

Description

Bowman is providing civil engineering design and construction plans in support of a Site Plan Revision for an electric substation. The Site Plan Revision will include the compilation of Existing Conditions Plan, identification of Heritage/Protected tree list, Demolition Plan, Erosion and Sedimentation Plan, and Site Plan sheets. Bowman also prepared a boundary, tree, and topographic survey for the 33.576-acre lot.

Team Members

With 32 offices nationwide, we continue to add staff, services, and locations to continue to provide the best development and infrastructure services to our clients.

800 Employees
70+ Fully Equipped Field Survey Crews
139 Professional Engineers
40+ Professional Surveyors
60+ Right-of-Way and Land Professionals
5 Environmental Specialists
60 Planners and Designers
11 Registered Landscape Architects

Awards

ENR - Top 500 Design Firms - #144 Overall (2021)

#9 - Mining (2020)

#13 - Data Centers (2020)

#18 - Water Transmission Lines (2020)

#20 - Sanitary & Storm Sewers (2020)

#46 - Telecom (2020)

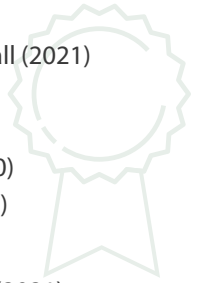
ENR Southeast - Top Design Firms - #89 (2021)

Washington Business Journal (2021)

#8 - Largest Engineering Firm

#8 - Largest Landscape Architecture

Zweig Group - Hot Firm's List (2021)



With nearly 13 percent average annual growth over the past 10 years, Bowman has grown not for the sake of growth, but on behalf of our customers. Our clients know their industry, their product and their end-user. It's our job to know our clients, their project drivers and how to achieve them. By leveraging the expertise of our local teams and the extensive knowledge of our national resources, Bowman stands ready to deliver innovative development strategies, design concepts and technological advancements to your next project.

National Footprint ... One Team!

Mixed-Use and Multi-Family

Our changing economy in the past decade has elevated the demand for more mixed-use and multi-family developments. These multi-faceted districts offer more functionality, modern amenities, and high-quality aesthetics. Being able to live, work, play and recreate in the same vicinity allows end-users to spend more time doing the things they enjoy, and allows developers to create more variety within compact areas of land.

With extensive architect and developer relationships nationwide, Bowman's comprehensive knowledge of this specialized market provides our clients with wide-ranging design solutions to increase property values, ROI, and reduce construction costs while providing added value to potential buyers. Our integrated team of experts are exceptionally skilled in navigating every step of the process from due diligence, permitting, entitlements, building systems and construction management to ensure every project is a success.



Program Expertise

- Carefully **integrated** utility, environmental, transportation, landscape and amenity designs.
- Creating a **sense of place** and desirable communities and marketplaces with quality and thoughtful master planning.
- Strong **attention to detail**. From planting selections to adjacencies, we never overlook how to do it right.
- A **keen understanding** of market demands and trends.
- We help to deliver **smarter, healthier and environmentally sensitive** communities.

Trusted Relationships

- DMB Associates
- A&R Development
- Avalon Bay Communities
- Continental Properties
- CRE Development Investments
- Glenbrook Capital Partners
- Koelbel & Company Trust
- Perry Rose
- Princewood Properties
- Resort Living Communities
- Saul Centers, Inc.
- Telesis Corporation
- The Garrett Companies
- United Development Corp.
- Urban Ventures
- Winter Park Development Company

Mixed-Use / Multi-Family Experience



Matthew's Memorial Terrace

Washington, DC

Matthews Memorial Terrace, located on the campus of Matthews Memorial Church, is a 100% affordable housing development consisting of an apartment building with 100 residential units, roughly of a third reserved for seniors. Bowman provided civil engineering and landscape architecture services for the project.



Old Dominion at Glebe Park

Alexandria, VA

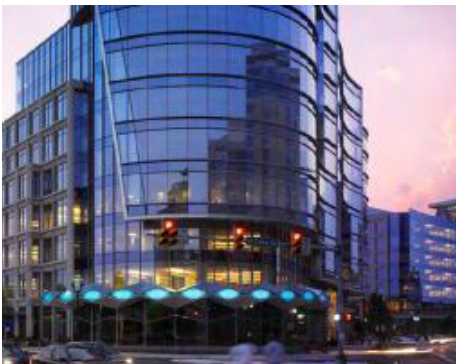
Bowman was selected by EYA and Alexandria Redevelopment Housing Authority to redevelop this property as an initial partnership between the two organizations. This standalone affordable housing property was updated by adding additional density and remodeled units.



The Jordan

Arlington, VA

The Jordan, is one of AHC'S affordable apartment communities. Bowman provided survey, engineering, and landscape architecture services to this award-winning project which features a landscape courtyard and a public linear walkway. Bowman designed a series of glass and stainless steel curved signs spread along the length of the walkway.



800 N. Glebe Rd. Redevelopment

Arlington, VA

Provided civil engineering and landscape architecture for this project that includes two, 7 & 10-story LEED certified office buildings, a 4-story 90-unit affordable condominium building, and 28 townhomes. Bowman designed the entire streetscape for the three blocks and a large public plaza, linear park, pocket park, historic and interpretative signage, and private raised courtyard.



2901 Eisenhower Avenue

Alexandria, VA

Bowman provided engineering and surveying services for this mixed-use development. It consists of 67 townhomes and two multi-family buildings with 533 units (21 dedicated affordable housing units) and 9,000 sq. ft. of retail on 8.97 acres. The majority of the site was regraded so that no building sits below a 25-foot elevation.



Barry Farm Redevelopment

Washington, DC

Site consists of approx. 34 acres that consolidates numerous parcels. A stage 1 PUD was approved for the site's redevelopment and consisted of complete demolition of all existing buildings and roadways, reconstruction of public roadways and infrastructure, and development of 17 blocks of mixed-income residential and retail space.

Mixed-Use / Multi-Family Experience



Landmark at Radburn

Fair Lawn, NJ

12-acre development consisting of twelve, three-story buildings, providing a total of 165 residential units of which 20% are considered affordable housing. Bowman provided all preliminary and final site plans, prepared a boundary and topographic survey, conducted a traffic impact study, and obtained all necessary local, county, and state permits.



Buchanan Gardens

Arlington, VA

Buchanan Gardens is an older garden apartment complex consisting of 111 affordable units. Bowman prepared final engineering plans, and tree preservation plans for this project and fully coordinated all aspects of the renovation with the Department of Environmental Services, CPHD, and the Fire Marshall.



Buckingham Village

Arlington, VA

This project consists of the rehabilitation of 141 existing garden affordable apartments located in 16 two-story buildings on a 5.74 acre site. Bowman provided planning, civil engineering, arboriculture, and geothermal services. The project also has historic significance because of its proximity to Buckingham Historic District.



Carpenter's Shelter

Alexandria, VA

Bowman provided civil, surveying, and landscape architecture services, working with the Alexandria Development Housing Corporation to redevelop a 7-story multi-family homeless shelter. Innovative solutions were designed for storm/sanitary sewers, dry utilities, and stormwater management.



Chatham Square

Alexandria, VA

Includes over 150 homes, two-thirds are luxury town homes and the remaining are affordable apartments. Bowman participated in the land purchase contract negotiations, developed the conceptual land use plan, prepared detailed construction drawings, and obtained a myriad of permits and approvals.



Old Town Commons (James Bland)

Alexandria, VA

This project consists of 134 affordable Alexandria Redevelopment and Housing Authority (ARHA) units and 245 market rate units. Bowman provided feasibility studies, SWM/BMP analysis, various surveys, conceptual layout reviews, and landscape architecture services. Additionally, Bowman applied for 6 special use permits, as requested by ARHA/EYA.

Mixed-Use / Multi-Family Experience



Aria Denver

Denver, CO

Bowman was selected to be the prime engineer from concept to final construction for this visionary mixed-use community. Once complete, Aria Denver will be home to townhomes, apartments, co-housing, assisted living and 30,000 sq. ft. of retail space. The 17.5 acre site features green housing options, open space and recreational options.



Braddock Gateway

Alexandria, VA

This residential/hotel redevelopment project consists of residential and retail units and is part of a CDD plan for a mixed-use area with a neighborhood park. Bowman designed an improved grid pattern of streets and layout to provide easy access for pedestrians and commuters to the Braddock Road Metro Station.



Harborage

Stuart, FL

Community consisting of 129 waterfront condominiums, one rack storage facility, retail, office, condominium building, and three new marinas stretching along the St. Lucie River bisected by the New Roosevelt Bridge. Related amenities include two pools, entry features, water front promenade and other improvements.



Block 37

Chicago, IL

This urban mixed-use project includes 400,000 sq. ft. above grade retail mall, entertainment, and approximately 100,000 sq. ft. 17-story Class A office space, a Pedway level consisting of an additional 30,000 sq. ft. of retail space and a future CTA facility that will serve to connect the Blue and Red Lines.



650 N. Glebe Road

Arlington, VA

This urban redevelopment mixed-use project consists of a five story building with two levels of underground parking. The new building houses approximately 5,220 sq. ft. of retail space on the ground floor, and 150 rental units. Bowman developed the site plan including landscape architecture, surveying, and civil engineering services.



Villages of Leesburg

Leesburg, VA

Bowman designed and entitled this mixed-use development which is modeled around a traditional Towne Center. The site includes office, retail, pedestrian walkways, and residential above retail space and commercial areas. This complex project involved the management and coordination with several specialty consultants.

Mixed-Use / Multi-Family Experience



Clarendon Center

Arlington, VA

The landmark mixed-use development consists of 244 residential units, 224,000 sq. ft. of office space, and 57,000 sq. ft. of retail space. Bowman's services include preliminary engineering during Arlington County's 4.1 process, final engineering and full landscape architectural design of streetscapes on roof top private amenity spaces.



Springs at Tradition

Port St. Lucie, FL

304 apartment units in 13 two-story buildings with detached garages, clubhouse, pool, two pet parks and other amenities on approximately 25 acres. Bowman was contracted for full civil engineering design and construction services including survey and landscape.



Carriage Park

Viera, FL

Bowman was responsible for design, entitlements, and permitting of this +/- 116 unit apartment complex in Brevard County, Florida. This was the second phase of Carriage Park and consisted of master planning of utilities, roadways, and storm water management, including wetland mitigation and conservation easement creation.



Metro West Towne Center

Fairfax County, VA

This mixed-use community incorporates a variety of residential, retail, office, daycare and public spaces. Bowman is providing engineering and surveying services, to include preliminary and final engineering. Scope of services includes conceptual plan review and coordination, detailed grading, and adjacent roadways and walkways.



Edmonson Plaza

Alexandria, VA

Project features 16,000 sq. ft. of ground-floor retail, 100,000 sq. ft. of office use on the upper four floors, a 12,000 sq. ft. below-grade retail area, health club and three levels of underground parking. Bowman provided the concept plan, preliminary development special use plan, final engineering site plan, and construction administration services.



LC Line Street

Charleston, SC

A mixed-use development includes a 255-unit 9-story apartment building, parking garage, train shed, and 5 historic houses that will make up a restaurant, bar, pool and apartments. Several historical buildings had to be relocated, while the train shed, and smokestack are preserved and built into the development plan.

Mixed-Use / Multi-Family Experience



965 Florida Ave., NW

Washington, DC

A 375,000 sq. ft. development which includes 428 residential units and a 45,000 sq. ft. Whole Foods grocery store. As part of the development, the PUD required intersection improvements including a full signalization and extensive streetscape rehabilitation.



Market Commons at Clarendon

Arlington, VA

Prepared existing conditions survey, located all existing utilities and prepared site development plans for this urban renewal project, which includes 3 underground storm water management facilities, utility company coordination, stormwater, water and sewer main studies to determine adequacy, and design of supplemental water mains.



Huntington Avenue Metro

Fairfax, VA

Bowman provided land planning, engineering and survey services for the preparation of a rezoning application in order to rezone. Zoning designation of the properties has allowed for 136,000 sq. ft. of mixed-use, retail and residential space including up to 140 residential units.



Rosslyn Central Place

Arlington, VA

This mixed-use development consists of an office tower and a residential tower both with 48,000 sq. ft. of ground floor retail. Bowman provided surveying, planning, civil engineering design, and the landscape architectural construction documents for rezoning. The project also included urban park and streetscape design, and pedestrian accessibility plans.



JRs @ Tysons

Tysons, VA

A 26-story mixed-use highrise urban plazas with recreation amenities and underground parking facilities. The one-acre site is the first of its kind in size and scope to be approved and located within one-half mile of the new McLean Metro station. Bowman provided engineering, landscape architecture, surveying and environmental consulting.



Alexandria Gateway

Alexandria, VA

A 4.5 acre redevelopment of the old Alexandria Hospital site, which included offices, retail, residential and underground parking. Bowman worked with the developer and design team through the final site plan (FDSUP) process which included state of the art stormwater management solution to improve the quality of runoff and lower quantity.

Mixed-Use / Multi-Family Experience



Modern on M

Washington, DC

The project consisted of underground parking, restaurants and residential units. Bowman was responsible for the civil design including underground parking garages, restaurant space and residential units. Bowman was point-of-contact and managed design, coordination, and submission associated with DC Water, DDOT, and DOEE.



Rhode Island Metro

Washington, DC

This transit-oriented project has been recognized for its smart growth and green design, including immediate access to public transportation, innovative shared parking, walk-ability and connectivity, green roof and energy efficient systems and building materials. Bowman provided full site plan including location and external dimensions.



View at Waterfront

Washington, DC

Two new multi-use towers containing 276 residential units and roughly 4,000 sq. ft. of ground-floor retail along M Street adjacent to the existing Pei Towers. The project also included several levels of subsurface parking rehabilitation of existing courtyard with an existing pool. The project was designed to achieve LEED Silver.



The Parks at Walter Reed

Washington, DC

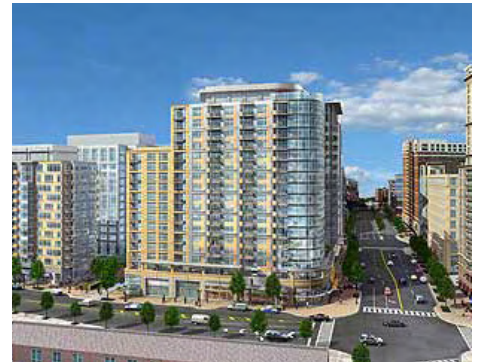
As part of the design team to develop the Master Plan for redevelopment, Bowman provided surveying and civil engineering support for this 66-acre mixed-use campus. Bowman developed schematic development including analysis of on-site and off-site roadway, existing and proposed wet and dry utility systems.



14th Street & U Street "The Louis"

Washington, DC

Redevelopment of a seven-story residential building with ground floor retail, upper level amenity terrace, green roof and below ground parking. The development included approximately 102,500 sq. ft. of residential space and 17,400 sq. ft. of retail space. Bowman provided design drawings, permitting and coordination.



Founders Square

Arlington, VA

Developed on 5.35 acres, this site will house approximately 1.2 million sq. ft. of building density and a significant landscaping component. The mixed-used project will be composed of one 13-story secure office building, one 15-story office building and two residential buildings, 17 and 12-stories, respectively, with over 360-units.

Mixed-Use / Multi-Family Experience



River Park

Hanover Township, NJ

This 70-acre mixed-use town center redevelopment project consists of 967 residential units in a series of mid-rise buildings with structured parking, two 125-room hotels and approximately 80,000 sf of retail and office. Bowman is providing civil engineering, surveying, landscape architectural, traffic and transportation engineering services.



Tanglewood Development

Elizabeth City, NJ

Tanglewood is a 943 acre master planned, mixed-use development with a total of 1,500 residential units including apartments, and single family detached units. The project also has 500 acres of commercial use property. Bowman provided engineering and planning services to multiple owners involved in this development.



Asbury Ocean Club

Asbury Park, NJ

Multi-story mixed-use development of 128 residential units, a 56-room hotel and 21,928 sq. ft. of retail space within the 230 acre waterfront redevelopment area of Asbury Park. Scope included site layout, grading and utility design, analysis of existing utilities providing service to the site, project permitting and construction specification preparation.



Sitzmark South

Winter Park, CO

Winter Park Development Company chose Bowman to entitle and design this new mixed-use development in the exclusive resort town of Winter Park. The final site design included a new grocery store, retail space, residential units and an underground parking garage.



Promenade at Castle Rock

Denver, CO

As one of the largest community center developments in the country, this 166-acre project includes retail, restaurants, services, multi-family residential and outdoor spaces. Bowman provided civil infrastructure design services including all of the metro district improvements, big box and small retail pads, multi-family sites and five regional ponds.



Tyson West Park Properties

McLean, VA

This multifaceted project occupies approximately 25 acres. Bowman is providing land planning, engineering, and survey consultation for the preparation of a rezoning application within the Tyson West Park area in order to rezone the subject parcels from Commercial to Planned Tyson Corner Urban District.

Mixed-Use / Multi-Family Experience



CSX East

Washington, DC

A 900,000 sq. ft., three structure development with a 170,000 sq. ft. two-level garage. The three structures are connected by a shared below grade garage. Two structures are residential with a total of 756 units, and the third will be a 225-key hotel. Services provided include mechanical and plumbing engineering.



Elan at Tysons West (Adaire)

Tysons, VA

A thirty-four stories, 405,000 sq. ft. mixed-use building which included 15 unique apartment unit types, a fitness center, 193,200 sq. ft. parking garage and rooftop multipurpose amenities space. Services provided include mechanical and plumbing engineering. The project received a LEED Silver rating.



Knox Road

College Park, MD

A 514,000 sq. ft. design-build mixed-use project. The project includes 341-rental units, ground floor retail and restaurant, and 107,450 sq. ft. underground parking garage. Services provided include MEP engineering design. The project is expected to receive a LEED V4 Silver rating at completion.



Museum Place - Residential

Washington, DC

A new 12-story mixed-use development with 486-apartment units. The project consists of 434,919 sq. ft. of residential units, 122,923 sq. ft. of ventilated parking garage, and 11,445 sq. ft. of indoor amenities areas. Services provided include mechanical and plumbing engineering design.



1777 Columbia Road

Washington, DC

A 60,000 sq. ft. mixed-use development is on an existing site and will maintain the historic street front retail bay with the new building built behind. The project includes 80-residential unit on six floors and retail bays along the street front. A single level underground parking is provided for the residents.



Mintbrook

Fauquier County, VA

Bowman provided civil engineering services for this 343-acre tract of land located in the Bealton area. The project is being developed with a variety of residential options totaling 475 units complemented by over 360,000 sq. ft. of commercial retail and office uses. The project also includes land dedication for public uses and facilities.

Mixed-Use / Multi-Family Experience



One Scottsdale

Scottsdale, AZ

This 120-acre mixed-use development includes 2.86 million square feet of space for commercial tenants, and will feature retail, restaurants and Class-A office space along with a variety of residential including condos and apartments. Bowman provided full civil engineering, survey and construction support.



Pacific Commons

Freemont, CA

This 840-acre planned mixed-use development has entitlement rights for over 8 million sq. ft. of office and commercial uses. As Engineer of Record, Bowman staff have been the common thread designer on this project since 1990. Approximately 1.2 million sq. ft. of R&D property is developed, as well as 730,000 sq. ft. of retail power center.



Quantum Park & Village

Boynton Beach, FL

Quantum Park & Village is a development of 115 residential units, office, retail/restaurant. As District Engineer, Bowman produced plans, construction drawings, specifications, bid documents and related contract documents. Bowman was in charge of contracts administration and construction observations.



West Jensen P.U.D.

Jensen Beach, FL

1,500 acre project of residential/commercial/multi-use development and environmentally sensitive areas constructed between 1998 and 2007. The development entailed extensive coordination between multiple developers, contractors, regulatory agencies, neighboring residents, and other consulting firms.



Bordentown Waterfront Phase II

Bordentown Township, NJ

Bowman provided the civil engineering, landscape architecture and surveying on this large redevelopment project. Phase II Bordentown waterfront community consists of multi-family housing at 157 townhouse units and 176 apartment units, a 10,000 sq. ft. retail building with a public park at the southern end of the site and a playground area.



Mine Hill

Township of Mine Hill, Morris Twp., NJ

The project proposes to construct 390 inclusionary multi-family units within ten buildings across the site. Also include is a club house with amenity areas and a dog park. In order for the project to proceed, Bowman provided a sewer service area map amendment and permitting for disturbance within environmentally sensitive areas.

Mixed-Use / Multi-Family Experience



699 Prince Street

Alexandria, VA

Bowman provided civil engineering, surveying, and arborist services for this redevelopment project converting a 88,587 g.s.f. office building into a hotel. The six-story structure will include approximately 99 rooms, with 42 rooms in an adjacent structure across an alleyway. The hotel will also include an indoor restaurant and rooftop dining.



Metropolitan Park 6 "Met 6"

Arlington, VA

Project consist of redevelopment of aging industrial sites to vibrant buildings including approximately 550 units and street level retail space. Bowman provided full engineering and surveying support from conceptual design to final construction documents, and support through complete Administrative 4.1 Site Plan process.



West Rosslyn East Building North Tower

Arlington, VA

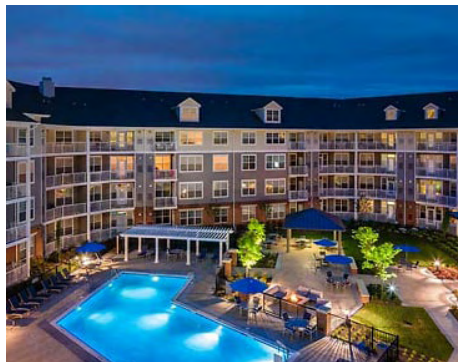
A luxury 27-story high-rise condominium project with 104-condominium units. The project also included a first floor lobby, 3,750 sq. ft. of lounge amenities area, rooftop, and 2-story 1,977 sq. ft. fitness center. Services provided include mechanical and plumbing engineering design.



Resort Lifestyle Communities

Various Locations, Nationwide

Bowman has partnered with Cameron General Contractors (CGC) to develop the Resort Lifestyle Community portfolio across the US. Bowman is providing program management assistance to CGC to fulfill their development goals and execute a wide range of planning, design and permitting services for each project site.



Avalon Wharton

Wharton, NJ

This six-story, luxury apartment complex consists of 248 units on 8.5 acres. Amenities include outdoor courtyards, swimming pool, and a fitness facility. Bowman provided a boundary and topographic survey, preliminary and final site plans, which included a stormwater management report, and conducted a traffic impact study.



Jefferson at Sullivan Place

Springfield, VA

Performed boundary, topographic, and ALTA surveys on this 498 unit luxury condominium on 17.2 acres. The property went through a rezoning process from commercial to residential use. This complex redevelopment involved selective demolition around existing properties and buildings that were to remain in service.

Mixed-Use / Multi-Family Experience



Avalon Bay at Andersons Corner

Bowie, MD

Bowman worked with the owner on the redevelopment of an existing residential parcel in the City of Laurel/Prince George's County, Maryland. The 40 acre parcel had significant engineering and planning challenges, including significant topography and County/State roadway dedications and widening on 3 sides of the parcel.



WMATA Bus Barn Redevelopment / 600 N. Royal Street

Alexandria, VA

Bowman provided civil engineering, arborist, and surveying services for this redevelopment project located in Old Town North in Alexandria. The project involves the demolition of the existing WMATA Bus Barn building, approximately 288,136 g.s.f. with 286 units, and construct a new residential building.



Carlyle Towers

Alexandria, VA

This ultra urban project includes three high-rise buildings with parking on 8 acres. Bowman prepared the existing conditions survey and located all of the existing utilities. The site development plan included underground water quality facilities, utility company coordination, storm drainage studies and design of the overall grading and infrastructure.



1201 N. Royal Street

Alexandria, VA

Bowman provided surveying services for this 208,537 g.s.f. with 73 units redevelopment project in the City of Alexandria. The new development will include approximately 90 residential units and an underground parking garage. The development will be surrounded by an 'arts walk', with access to the Mount Vernon Trail.



The Oronoco

Alexandria, VA

Bowman provided surveying services for this redevelopment project located in the City of Alexandria. The Oronoco is a modern condominium development, redeveloped from the former Sheet Metal Workers Union Pension Fund building, with 60 condominiums in the five-story building.

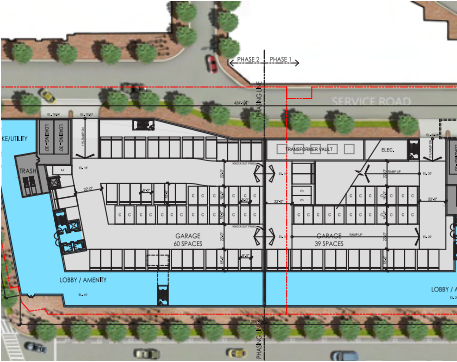


Atlantic Plumbing Building

Washington, DC

The project consists of the redevelopment for two (2), high-density, multi-family buildings with below-grade parking. The sites are located adjacent to the 9:30 Club in close proximity to Howard University. Significant upgraded utilities, streetscape, and pedestrian facilities are incorporated into the project.

Mixed-Use / Multi-Family Experience



Eisenhower Center

Alexandria, VA

This unique project is located on Eisenhower Avenue, adjacent to the new Patent and Trade Offices (PTO) of Carlyle, on the east end of Eisenhower Valley. Simpson Development is leading this improvements project, and removing two existing office buildings and constructing two new residential towers.



Lacey Court Apartments Rehabilitation

Alexandria, VA

This ambitious project included the upgrade and renovation of 44 units, located in three buildings, on approximately 60,500 sq. ft., on 3 separate parcels. The proposed improvements were completed in 2020.



Potomac Yard

Alexandria, VA

Provided planning, civil engineering and site lighting design for Potomac Yard Landbay's I, J, & L and infrastructure improvements for Main Line Blvd. Designed neighborhood centers including 265 townhomes, 306 urban lofts, and three multi-family residential buildings linked via 5,700 lf of designed residential roadways and ped walkways.



East Beach Harbor Apartments

Norfolk, VA

Bowman developed the site plan and permit documents for this waterfront apartment complex. The project includes a 126-slip Marina and each complex includes a parking garage and paved public waterfront promenade. Bowman's design work included a full site layout including utilities, stormwater management, grading, and erosion etc.



Centerpoint III

Fairfax County, VA

Once a major office project in the 80s & 90s, this condo/apartment redevelopment project includes 90 townhome units, 120-multifamily units sitting on 7.85 acres. Bowman provided land planning services to update the approved zoning for the site to allow single-family attached housing.



Halstead Towers

Alexandria, VA

Halstead Towers is a luxury condominium building featuring an innovative green roof system. Bowman designed this extensive green roof system for the public plaza area located directly above the building's parking structure.

Mixed-Use / Multi-Family Experience



Caliber at The Grove

Thornton, CO

Bowman rezoned this 12 acre property into a Planned Development consisting of 30,000 sq. ft. of retail, 222 multi-family apartment units, a 110 room hotel, clubhouse and amenities. Also provided full site engineering, including stormwater management, and surveying for this project from rezoning to construction documents.



Reunion at Winter Park

Winter Park, CO

Reunion at Winter Park is a mixed-use project in the popular resort town of Winter Park consisting of 5,000 sf of retail/restaurant and eight condominium units. Bowman provided full site engineering and entitlement services from Preliminary Plat to Final Plat and Construction Documents. Construction will commence summer 2020.



Greeley 55 Resort

Greeley, CO

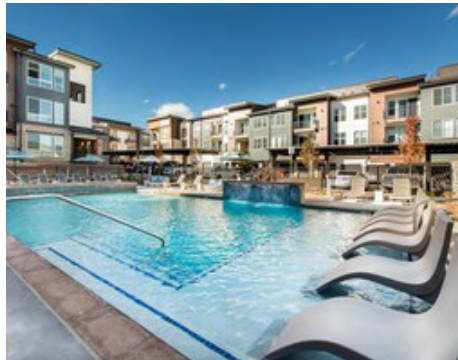
This 4-story age restricted multi-family project on 1.26 acres included requirements to maintain the art deco style building envelope and overhead utility relocation. Underground stormwater detention was utilized to meet city code, and careful attention to building water usage to negotiate a lower impact fee for water service.



1225 Santa Fe

Denver, CO

Located in the heart of Denver, this exciting project is an infill of luxury condominiums by CRE Development. Bowman designed and processed the site development, Denver Water, SUDP and TEP plans for this project, which is already under construction.



Village at Centennial

Centennial, CO

Bowman entitled and designed this new multi-family project for Glenbrook Capital Partners. The site includes 203 rental units in seven buildings with a clubhouse and pool.



Caliber at Voyager

Colorado Springs, CO

Bowman entitled and designed 193 luxury rental units in two buildings under a Conditional Use Development Plan for The Garrett Company, a national multi-family developer. Construction is currently underway.

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. HTCPIS deadline.)
- 26) Leading the construction draw requests to construction lender and equity provider.
- 27) Ensuring all tax credit equity is drawn according to agreed upon milestones.
- 28) Coordinating with property management on lease-ups for HTC projects.
- 29) Structuring housing vouchers in new developments.
- 30) Designing supportive housing models based on site and project parameters.
- 31) Tracking project stabilization and leading the conversion to permanent mortgage.
- 32) Facilitating the refinancing of six different communities and preserving affordability.
- 33) Coordinating the Year 15 response on HTC financed communities.
- 34) Leading the closing on land acquisition and all project financing including coordinating the closing team and responding to due diligence calls from lender and investor.
- 35) Creating a compliance checklist that details all funder requirements for ongoing operations.

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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

Locke Lord

About us

Locke Lord is a premier full-service law firm that has earned a solid reputation for complex litigation, regulatory and transactional work on behalf of clients in important and growing industry sectors around the world.

Throughout our more than 130-year history, we've cultivated partnerships with a broad range of public and private companies, from Fortune 500 leaders to startups and emerging businesses. Our team can design strategic solutions that meet your long-term goals no matter how large or small your matter, applying our established tradition of responsive, personalized service.

At Locke Lord, our diverse and inclusive culture of collegiality and collaboration — core values of the Firm — across all of our offices and practices is ultimately reflected in our client experience by culminating in a deep understanding of our clients' businesses.

Corporate responsibility is also an important part of Locke Lord's mission as we reach out to the communities we serve in meaningful partnerships and pro bono work.



Firm Accolades

- **Locke Lord consistently ranks among the top 100 law firms nationally** in the annual Am Law 100 (American Lawyer) list, currently listed at No. 83 in 2021.
- **In 2021, BTI Consulting Group named Locke Lord to its list of Most Recommended Law Firms and to its annual Client Service A-Team. In 2020, BTI recognized Locke Lord as one of the law firms that top legal decision makers and Fortune 1000 clients said are best at developing and implementing alternative fee arrangements** based on the Firm's certainty, streamlined approach and value. **BTI also named Locke Lord as a firm that is "winning in the COVID-19 world"** by jumping in and committing as the pandemic redefined clients' objectives, with inside counsel saying they would go to the mat to keep the Firm.
- **Chambers USA ranked 63 Locke Lord lawyers and 24 of the Firm's practice areas for excellence in its 2021 edition.** Ten of the Firm's lawyers achieved Band 1 rankings in their respective practice areas, and the Firm's Energy: Oil & Gas (Transactional) practice earned a national distinction.
- **Chambers UK 2021 named two Locke Lord lawyers as leading practitioners in their respective practice areas and recognized Locke Lord's UK Consumer Finance practice.**
- **Locke Lord achieved Mansfield Rule 3.0 Certification from Diversity Lab**, recognizing the Firm for hitting targets designed to boost the representation of diverse lawyers considered for a variety of roles and opportunities within the Firm.
- **Locke Lord achieved a 100 percent rating in the Human Rights Campaign Foundation's 2021 Corporate Equality Index** for the fifth consecutive year, and Locke Lord predecessor firm Edwards Wildman earned a 100 percent rating for seven consecutive years from 2009-2015. A perfect score in this annual report evaluating policies and practices related to LGBTQ employees earns the Firm the distinction of being an employer of choice for LGBTQ employees.
- **Thirteen Locke Lord practice areas were named among the top nationally in the 2021 Best Law Firms survey by U.S. News/Best Lawyers®.** Locke Lord's top practice areas earning a Tier 1 U.S. ranking are: Appellate Practice; Banking and Finance Law; Commercial Litigation; Corporate Law; Employment Law - Management; Energy Law; Insurance Law; Litigation - Intellectual Property; Litigation - Labor & Employment; Oil & Gas Law; Public Finance Law; Real Estate Law; and Tax Law.
- **One hundred and forty-five Locke Lord lawyers from 16 U.S. offices were recognized in the 2021 edition of The Best Lawyers in America®,** and five of the Firm's lawyers based in Boston, Dallas and Providence were named Lawyers of the Year.
- **Locke Lord's London office was recognized by The Times on its Best Law Firms 2020 list in England and Wales,** with a commendation for the Firm's Bankruptcy, Restructuring and Insolvency Practice Group.
- **Locke Lord was recognized in the 2020 edition of the GRR 100,** a survey published annually by Global Restructuring Review listing the top firms capable of handling cross-border restructurings and insolvencies as well as related matters such as banking and sovereign debt crises.
- **Locke Lord is among the first law firms to earn the internationally recognized ISO/IEC 27701:2019 certification for its excellent Privacy Information Management System,** reflecting the Firm's strong emphasis on information security, privacy and protecting client data.
- **The American Bar Association recognized Locke Lord as an ABA Free Legal Answers 2020 Pro Bono Leader** for the Firm's tremendous contribution to the program, which offers a free virtual legal advice clinic for low-income individuals.
- **Volunteer Legal Services of Central Texas recognized Locke Lord in both 2016 and 2018 as a Pro Bono Champion,** which celebrates firms and volunteers that have devoted an extraordinary amount of financial support and time helping low-income clients access the justice system by providing legal advice and

representation.

- **Locke Lord's Health Care Practice Group ranked prominently in Modern Healthcare Magazine's 2021 Largest Health Care Law Firms list.** The Firm was ranked the 28th-largest health care law firm in the country.
- **Locke Lord's Federal Public Law and Policy Practice Group ranked as one of Bloomberg Government's 2020 Top-Performing Lobbying Firms** by revenue and was listed among firms with perfect short-term client retention.
- **The Firm's Insurance and Reinsurance Group is consistently recognized in national and international publications**, including being honored among Law360's 2019 Insurance Groups of the Year for the depth and breadth of the practice and its role in landmark deals and litigation. Locke Lord's Insurance and Reinsurance lawyers are also frequently included in The International Who's Who of Insurance & Reinsurance Lawyers list of leading U.S. firms and have earned a string of accolades from Chambers USA: Client's Guide of America's Leading Lawyers for Business, The Best Lawyers in America® and The Legal 500 United States.
- **Locke Lord ranked No. 4 by deal count for Texas M&A in 2020**, advising on 36 deals, and No. 5 by deal count for Texas M&A in 2019, advising on 44 deals – two of the Firm's numerous top 10 rankings for Texas M&A in the past five years based on Mergermarket data.
- **Locke Lord secured the fifth spot among the most active private equity law firms in the U.S. South in PitchBook's 2019 rankings for Law Firms by Private Equity Deal Location**, with 18 deals in the region.
- **Locke Lord's Public Finance Practice Group was ranked No. 3 in the nation for competitive sales in The Bond Buyer's H1 2021 Top Bond Counsel rankings**, with 113 issues totaling \$2.05 billion, the highest number of issues of any firm in the top 10. In addition, The Bond Buyer ranked Locke Lord No. 4 Top Bond Counsel in the nation for competitive sales and No. 8 Top Underwriter's Counsel for the full year 2020.
- **Locke Lord Atlanta and New York Partners were identified among the top patent professionals around the globe in the 2017-2019 editions of Intellectual Asset Management Patent 1000.**
- **Locke Lord has been ranked No. 35 for debt deals among real estate law firms in New York City by The Real Deal**, with two deals totaling \$156 million between Sept. 1, 2019, and Sept. 30, 2020.
- **Locke Lord has once again been named the No. 1 Texas law firm lobby practice for 2021 by Capitol Inside's biennial Texas Lobby Power Rankings**, a position the Firm has held since 2004. In addition, Partner Robert Miller, Co-Chair of the Firm's Public Law and Policy Practice Group, is ranked among the top three lobbyists in the state. According to the publication, there is "a case for Miller as the most successful lobbyist in the Lone Star State."

Locke Lord Achieves Mansfield Rule Certification 3.0 From Diversity Lab

Locke Lord Chair David Taylor Speaks to Bloomberg Law on What Sets Locke Lord Apart, Challenges and Opportunities in the Legal Space, Leadership Convictions, Career Advice and More

Locke Lord Earns Fifth Consecutive Perfect Score, Recognized as Employer of Choice in Human Rights Campaign Foundation's 2021 Corporate Equality Index

Locke Lord has achieved a 100 percent rating in the Human Rights Campaign (HRC) Foundation's 2021 Corporate Equality Index (CEI) for the fifth consecutive year. A perfect score in this annual report evaluating

policies and practices related to LGBTQ employees earns the Firm the distinction of being an employer of choice for LGBTQ employees.

ALICE K. GLASCO
512-231-8110
alice@agconsultingcompany.com

RESUME

EDUCATION

- ◆ Master of Science in Community and Regional Planning, School of Architecture. The University of Texas at Austin.
- ◆ Bachelor of Arts in Political Science, College of Liberal Arts. The University of Texas at Austin.

PROFESSIONAL EXPERIENCE

February 2006 - Present	President , ALICE GLASCO CONSULTING – an urban planning firm that provides land development services relating to neighborhood planning, zoning administration, subdivision, and site development.
March 2001 - January 2006	Department Director , CITY OF AUSTIN, NEIGHBORHOOD PLANNING AND ZONING DEPARTMENT. In charge of land use planning, growth management, zoning administration, urban design, historic preservation, and annexation.
January 1996 - March 2001	Department Director , CITY OF AUSTIN, DEVELOPMENT REVIEW AND INSPECTION DEPARTMENT. Directed all land development processes, including zoning, subdivision, site plans, building plan review and inspections.
April 1994 - January 1996	Assistant Director , Development Services Division, CITY OF AUSTIN, DEPARTMENT OF PLANNING AND DEVELOPMENT. Directed development processes, which included zoning, subdivision, site plans, building plan review and inspections.
February 1991- April 1994	Division Manager , current Planning, CITY OF AUSTIN, DEPARTMENT OF PLANNING AND DEVELOPMENT. In charge of zoning, subdivision, and historic preservation programs.
May 1989 - February 1991	Program Manager , CITY OF AUSTIN, DEPARTMENT OF PLANNING AND DEVELOPMENT. In charge of zoning, historic preservation, and municipal utility district programs.
March 1989 - May 1989 July 1984 - March 1989	Supervising Planner , Comprehensive Planning, CITY OF AUSTIN DEPARTMENT OF PLANNING AND DEVELOPMENT. Coordinated comprehensive planning activities. Land Use Planner : Managed and coordinated the review of development proposals.

PROFESSIONAL & CIVIC ASSOCIATIONS

- ◆ Real Estate Council of Austin
- ◆ Ascension Texas Board of Directors - Seton Family of Hospitals and Providence
- ◆ Commercial Real Estate Women of Austin – Former Member
- ◆ Salvation Army – Former Board Member
- ◆ Boys and Girls Club of Austin - Former Board Member



HomeBase Experience Summary

HomeBase has been working in the affordable housing space in Austin since 2005. Since being acquired by Austin Habitat for Humanity (AHFH) in 2011, HomeBase has served as the in-house affordable housing consulting firm for AHFH. This allows HomeBase to leverage Habitat's decades of experience in affordable housing, HUD-certified financial counseling, long-term affordability, financing, and sales to assist in the planning, creation, preservation, and resale of affordable homes throughout Austin. (Key staff work for both agencies simultaneously.) Recent projects include Westgate Grove (61 homes), Canopy at Westgate (88 homes), Croslin Court (20 homes), Willa (6 homes), with several other developments currently under construction. These soon-to-be-available units include 13 affordable condos at 44 East, a luxury high rise on Rainey St, and 6 townhomes at the Addie in Westlake, among others.

Key Staff

Key staff include:

Phyllis Snodgrass, CEO

Wayne Gerami, CPO

Kelly Outlaw, CFOO

Robin Lafleur, HomeBase Program Manager

HomeBase has multiple bilingual staff and is fully capable of working both in-person and remote, depending on our clients' needs.

Phyllis Snodgrass

(512) 757-5715 • psnodgrass03@gmail.com

SUMMARY

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

AREAS OF EXPERTISE

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

EXPERIENCE

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

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

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

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

Manage staff of 55+ FTEs with a \$7 million annual budget.

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

SVP - Member Relations September 2011 - January 2013

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

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

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

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

Implemented internal messaging strategy for staff and volunteers in 2014

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

Created new programs and strategies to meet member needs

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

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

Increased income for TCCE by 36% in one year

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

Facilitated Chamber Board retreats across the state of Texas

Developed affinity program review and approval policies for TCCE

Successfully managed first association audit for TCCE in its history

Planned and executed first 5 year strategic planning effort for TCCE

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

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

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

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

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

Founded SOAR (Seeking Opportunities, Achieving Results), a P-16 collaborative effort of the San Marcos Chamber, Texas State University, San Marcos Independent School District and the City of San Marcos.

Established the Chamber as a leader in economic development, tourism, educational attainment and community development

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

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

Increased membership from 850-1100 sustained members

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

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

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

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

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

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

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

Increased membership from 350 to 800 sustained members

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

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

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

Counseled numerous small and start-up businesses

Assisted with SBA loan proposals and business plans for small businesses

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

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

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

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

Managed contract firms hired to review Southwest Plan quarterly payment requests and approved payment request for six Southwest Plan Institutions

Named to FDIC National Performance Standards Task Force in 1994

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

Provide accounting services and management advice for start-up real estate development company

Assisted in successful negotiations and subsequent sale to Koll Company

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

Auditor for international real estate accounting firm headquartered in Los Angeles

Performed management consulting services including loan workouts in 1986 and 1987

Obtained CPA certification, May 1987

EDUCATION

The University of Texas at Arlington Bachelor of Business Administration May 1984

Major: Accounting, Minor: Management

Institute for Organization Management Certificate in Non Profit Management July 2004

Georgetown University McDonough School of Business, New Strategies Program, September 2016

PROFESSIONAL AFFILIATIONS

Enactus Advisory Board, Texas State University

Advisory Board, Habitat Texas

Wayne Gerami

7003 Frontera Trail • Austin, TX 78741

NMLS #1436154

512.436.3690 • wayne.gerami@gmail.com

Education

Masters of Public Affairs (2011)

LBJ School of Public Affairs at UT Austin (TX)

B.A. Psychology (2007)

Framingham State University (Framingham, MA)

Professional Experience

Austin Habitat for Humanity | HomeBase Texas

August 2013 – Present

Chief Program Officer

Feb 2020 – Present

Austin, TX – Promoted from previous position to manage three additional teams, broadly covering volunteer and community engagement/advocacy. Responsible for 9 FTE across five programs, including two organizations (Habitat/HomeBase). Active member of senior leadership team determining organizational direction & priorities.

VP of Client Services

Nov 2015 – Feb 2020

Managed three programs: New Construction, HomeBase, and Housing Counseling. Primary advocate within the agency for issues specific to family partners. Developed and implemented policies and processes for all programs, including novel resale restrictions to ensure permanent affordability of all homes sold. Oversaw the departmental budget and ensure that all programs meet important deadlines and performance metrics.

Government Grants Manager

May 2015 – Nov 2015

Managed the identification of and application for all governmental funding sources. Responsible for post-award reporting and compliance at the federal, state, and local levels. Oversaw a grants portfolio in excess of \$2,000,000, including over \$750,000 in new money generated in less than 6 months. Reviewed contracts for partnerships with various funders and partner organizations. Prepared and adhered to budgets. Built and maintained outstanding relationships with funders.

Community Engagement Manager

January 2015 – May 2015

Worked with families, volunteers, and partners of various backgrounds to engage existing neighborhoods with service providers in the community.

Lending Coordinator

August 2013 – January 2015

Led the complete overhaul and modernization of all aspects of program delivery including loan servicing and client database. Changed agency policies surrounding family selection, resales, shared equity, and underwriting.

Board Director – Austin Christian Church

August 2014 – March 2021

Austin, TX – Helped oversee the expansion to a second location. Responsible for setting staffing compensation policies and levels, managing a \$750k+ budget, and serving as an integral part of the establishment of our successful second campus at the Zach Scott Theatre.

Board Director – Evolve Austin

April 2017 – April 2021

Austin, TX – Advocate for the implementation of the Imagine Austin comprehensive plan through the CodeNEXT/Land Development Code rewrite process. Serve on the 501(c)(3) and 501(c)(4) boards.

Project Coordinator – Diana McIver & Associates

January 2012 - August 2013

Austin, TX - Worked on affordable rental developments across Texas, utilizing Low Income Housing Tax Credits, HUD 202/811 grants, HOME funds, and conventional funding. Completed complex grant packages, extensive work with HUD, TDHCA, and HACA.

ROBIN LAFLEUR

1309 Cedar Hills Blvd. • Cedar Park, TX, 78613 • (512) 750-5114 • robinkaylafleur@yahoo.com • linkedin.com/in/robin-k-lafleur

SUMMARY

Experienced professional with more than 15 years in real estate, finance, and operations. Strong ability to identify and implement positive change across all aspects of operations. Able to efficiently manage budgets and strict deadlines while generating new revenue growth and enhancing process.

EXPERIENCE

2020-Present

Austin Habitat for Humanity/HomeBase Texas

Austin, TX

Program Manager

- Perform project reviews and "on demand" assistance to optimize program outcomes and project deliverables
- Coordinate with developers, construction teams, and clients to ensure completion of all tasks according to established timelines, serving as primary point of contact for buyers throughout the building cycle, attending regular on-site meetings with construction/development teams
- Work with clients including potential homebuyers, loan applicants, community partners, and lenders while ensuring compliance related to various local and federal government programs
- Qualify and cultivate potential opportunities with key clients and outside entities to develop innovative and comprehensive solutions
- Develop content and ongoing updates to manage the program's website and support the program's social media engagement.

2014 – 2019

Senior Program Coordinator

- Managed many aspects of HomeBase's affordable housing program, including oversight of the client intake process, assisting more than 100 families through the homebuyer qualification process, and oversight of a 61-unit condominium project and a 21-unit townhome renovation project
- Negotiated, reviewed, and executed 50+ contracts with clients for affordable homes while working within the local government compliance requirements
- Worked with the Director of Grants and Contracts to assist with the hosting of regular financial literacy events for the public and secured \$10,000 in grant funding

2011 – 2013

ReStore Operations Manager

- Directed all back-office operations for the ReStore including vendor relations, maintaining an inventory of more than \$1,450,000 in purchased and donated materials, and reconciling more than 3,000 transactions per month
- Negotiated non-profit discounts on purchased materials with a variety of local and national vendors, including an agreement with a paint supply vendor that facilitated a 70% profit margin and a higher return on investment
- Led the implementation of an automated solution for donation pickup scheduling, saving nearly \$20,000 per year

2019 – 2020

Business & Community Lenders of Texas/Texas Community Builders

Austin, TX

Real Estate Specialist

- Managed a \$2.5MM Real Estate portfolio including both remote and direct property management, sales transactions and asset management
- Performed analysis of current market and property conditions to implement a rent increase thereby raising rent revenue by 25% for FY2020
- Provided direct support to the Director of Community Development, securing necessary architects, civil engineers and general contractors for upcoming development projects across the state of Texas
- Implemented a Property Management software solution to decrease vacancy rates to less than 9% and increase revenue

2004 – 2011

Smith's Consulting Services

Austin, TX

Principal Operations Consultant

- Provided comprehensive operations and financial consulting to software and IT clients across Austin, including cash flow management and reconciliation, coaching for employee transitions and staff development, and creation of job descriptions and candidate search procedures for recruiting
- Assisted a start-up software client with the creation and execution of a financial plan in preparation for a successful acquisition, including planning for structuring cash flows, development of a comprehensive business plan, and an in-depth audit to ensure they were acquisition-ready

2005 – 2009

IBM, Inc./BuildForge, Inc.

Austin, TX

Finance Integration Lead & Client Program Manager

- Oversaw the integration of BuildForge into IBM's operation following its acquisition in 2006, with responsibility for providing documentation necessary to support the transition of client contracts and ensuring legacy employees became fully immersed into IBM's culture and training processes
- Organized a break-out session during a 1,500-attendee conference, bringing together major stakeholders to provide clients with additional software functionality within one of IBM's products, resulting in a solution that retained an endangered \$750,000 contract at little cost to IBM

PROFESSIONAL DEVELOPMENT

Texas Department of Housing & Community Affairs

Eligibility Training for Affordable Housing Programs (2015)

NeighborWorks Center for Home Ownership Education & Counseling

Credit Counseling for Maximum Results (2016)

Building Skills for Financial Confidence (2018)

Community Economic Principals, Practices & Strategies (2019)

Cape School, Inc.

20-Hour Secure And Fair Enforcement Act (SAFE) Comprehensive Principals of Mortgage Lending (2016)

3-Hour SAFE Guide to Texas Mortgage Law (2016)

Champions School of Real Estate

180 TREC Certified Hours (2020)

LICENSE & CERTIFICATION

Real Estate Sales Associate

Real Estate Sales Agent License, # 738124

Mortgage Loan Officer

Residential Mortgage Loan Officer License, MLS#1508051

PROFESSIONAL & VOLUNTEER MEMBERSHIPS

President, C.P. Carriage Hills HOA 2020-Present

Urban Land Institute 2019-Present

Austin Women in Housing 2017- Present

Austin Board of Realtors 2020- Present

Kelly Outlaw, CPA

Round Rock, TX | (512) 281-6295 | koutlaw@texasenterprises.com

Chief Financial Officer

Financial Management | Project Execution | Strategic Vision & Planning

Exceptional leader and licensed CPA with expertise in all facets of financial management, financial analysis, business development, and strategy execution within the highly visible and ever-changing oil and fuel industry. Skilled in collaborating with all members of an organization to achieve business and financial objectives. Accomplished in structuring and negotiating acquisitions, commercial loans, and investment strategies. Instrumental in streamlining and improving processes, enhancing productivity, and implementing creative technology solutions throughout the sales, marketing, operations, and finance functions of the company. Possesses current CPA certification in the state of Texas; technical proficiency in MS Office Suite, QuickBooks, Sales Force, Sage DM2, Maptitude, and Prophet21.

- | | | |
|-----------------------------|---------------------------------------|-----------------------------------|
| ▪ Corporate Finance | ▪ Competitive Intelligence | ▪ Financial Analysis & Reporting |
| ▪ Contracts and Procurement | ▪ Business Continuity Planning | ▪ Continuous Process Improvement |
| ▪ Business Development | ▪ Organizational/Executive Leadership | ▪ Troubleshooting/Problem-Solving |
| ▪ Mergers & Acquisitions | ▪ Resource Management | ▪ Project Management |
| ▪ Internal Audits | ▪ Operations Management | ▪ Recruiting & Talent Management |
| ▪ Risk Management | ▪ High-Level Sales Proficiency | ▪ Brand Development |

PROFESSIONAL EXPERIENCE

TEXAS ENTERPRISES, INC., Austin, TX

2011 – Present

Chief Financial Officer, 2020 – Present

- Manage financial planning and budget (with focus on growth and diversification) for company with annual revenue of \$350M+
- Member of our Executive Leadership Team that sets the vision, budget, and operational strategy of the company.
- Working with the Executive Team, developed the company's Core Values, Mission Statement, and produced a company culture and brand video.
- Provided company with liquidity to run business at market leading rates by renegotiating a \$12mil line of credit, doubling our main supplier credit terms, and executing a strategy to pay off 2 largest debt notes.
- Played a key role in diversifying business and positioning the company for a post-COVID environment through multiple strategic investments, and large-scale acquisitions.
- Established competitive compensation and bonus structure to promote growth for the sales department, resulting in YoY revenue increase of 10%
- Developed a comprehensive IT department restructuring, promoting a new Vice President, and driving focus and execution of efficiency projects across all departments of the organization.
- Spearheaded growth initiatives for suppliers through successful supplier contract negotiations of over \$250,000 and enhanced pricing strategies for 50+ suppliers across 6,000 SKU's; significantly increased business development by diversification of new lines, exceeding merger & acquisition (M&A) goals, and executing tactical marketing campaigns.

Vice President, Business Development, 2018 – 2020

- Develops, executes, and measures overall success of company's strategic 1, 3, 5, and 10-year plans;
- Drives strategic objectives including increased efficiency, sales/growth, and team development; partnered with IT team to deliver innovative technology solutions for Transportation Department including Uber Freight, Sales Force, wireless warehousing, accurate delivery/logistical reporting, and a revamped B2B company website, ultimately increasing company profit by over \$500,000 year-over-year.
- Provided direct sales coaching to our 34 outside sales reps through field rides, training programs, and assistance in their coaching and development with HR and their direct supervisor.
- Achieved the Marketing Excellence award from ExxonMobil for enhancing their Mobil 1 brand, executing a comprehensive marketing strategy for their distributors, and increasing volume growth by 15%.
- Rolled out upgraded B2B website that provides ordering capabilities, payments on account, technical documentation, and full brand marketing for our employees and customers.

Kelly Outlaw

Page Two of Two

General Manager, Transportation, 2016-2018

- Provided direct operational oversight for more than 30 Team Members and 2 Directors (Marketing and Business Analysis); performed all HR-related tasks including recruiting, hiring, onboarding, training, and developing and maintaining individual development plans (IDP's) for all assigned employees.
- Transformed dilapidated Transportation department into integral component of company's fuel and logistic strategy through successful execution of driver recruitment, operational efficiency, equipment and resource management, new customer acquisition, and safety protocol/policy initiatives.
- Through Revenue and Expense management, increased net income by \$500,000 annually and decreased overall safety incidents by 40%.

Business Analyst, 2014-2016

- Created, implemented, and cultivated full-cycle marketing programs for all lines of business including ExxonMobil Lubricants, Mighty Filters, Diesel Exhaust Fluid, and multiple ancillary product lines; oversaw sourcing, pricing, and costing for over 6,000 products.
- Led major organizational change initiatives including sales territory realignment, delivery and logistical analysis of all 6 divisions, and integration of 4 key acquisitions into Accounting ERP and Company SOPs.

Manager, Accounting, 2011 – 2014

- Oversaw Accounting team responsible for preparation of financial reporting, review and analysis of financial statements, sales reconciliation, revenue recognition, and payroll/401k audits; reported to CFO and Owner.

EDUCATION & CREDENTIALS

Bachelor of Science Degree in Petroleum Engineering, University of Texas, 2010

Leadership Program, Harvard Business School Online, 2019

Certified Public Accountant (Texas), American Institute of Certified Public Accountants | Member, Texas Society of CPA's

Driven to a life of supporting "those who didn't choose."

Prospective Board Member of Red Cross – YMCA Donor and Volunteer – Jail to Jobs Donor and Volunteer

3.3 Developer Previous Experience

Tax Credit Affordable Multifamily Housing (Also refer to attached Legacy Impact Housing, Legacy MCS and Craig Alter expanded previous affordable housing development experience resumes in Section 3.2)

- Commons at St. Anthony's (historic rehabilitation), Amarillo, Texas (2020 tax credit award). 3.9 acres; 124-midrise efficiency, 1-bedroom & 2-bedroom apartment homes; 225,634 sf gross floor area; 30% AMI-60%AMI; Development budget = \$28,458,629; 16-month project construction period (under construction).
- Southern Commons, Oklahoma City, OK (2020 tax credit award). 4.7 acres; 77- mid-rise 1 & 2-bedroom apartment homes; 76,257 sf gross floor area; 50% AMI-60% AMI rent structure; Development budget = \$17,175,122; 14-month construction period.
- THRIVE, Oklahoma City, OK in partnership with the Oklahoma City Housing Authority (2019 4% tax credit award). 2.03 acres in downtown OKC; 176-midrise senior independent living 1-bedroom apartment homes and 140-midrise assisted living 1-bedroom residences; 136,476 sf gross floor area independent living & 95,792 sf gross floor area assisted living above parking and community space podium; 30% AMI-50% AMI (253 apartments with project based housing vouchers); Development budget \$58,512,970; 16-month construction period (under construction).
- Avenue Commons, Andrews, Texas (2018 9% tax credit award). 8.657 acres; 60-garden style 1, 2, & 3-bedroom apartment homes; 62,413 sf gross floor area; 30% AMI-Market rate rent structure; Development budget = \$10,993,294; 14-month construction period.
- Dunbar Commons (historic rehabilitation), Oklahoma City, OK (2017 9% tax credit award). 4.4 acres; 52 walk-up 1 & 2-bedroom apartment homes; 63,341 sf gross floor area; 50% AMI-60% AMI rent structure; Development budget = \$10,770,706; 16-month construction period.
- 87th, Odessa, Texas (2016 4% tax credit award, Odessa HFC partnership). 13.39 acres; 181-walk-up 1, 2, & 3-bedroom apartment homes; 202,898 sf gross floor area; 60% AMI rent structure (with 114 project based housing vouchers); Development budget = \$29,555,348; 17-month construction period.

- Windy Ridge, Austin, Texas (2013 9% tax credit award). 8 acres; 120 walk-up 1, 2, & 3-bedroom apartment homes; 124,594 sf gross floor area; 80% AMI-60% AMI rent structure; Construction budget = \$9,000,000; 11-month construction period.
- Oak Ridge, Nolanville, Texas (2013 9% tax credit award). 6 acres; 120 walk-up 1, 2, & 3-bedroom apartment homes; 215,941 sf gross floor area; 80% AMI-60% AMI rent structure; Construction budget = \$4,000,000; 12-month construction period.
- Highland Villas, Bryan, Texas (2012 9% tax credit award). 9 acres; 48 walk-up 1, 2, & 3-bedroom apartment homes; 52,830 sf gross floor area; 80% AMI-60% AMI rent structure; Construction budget = \$14,000,000; 10-month construction period.



ASSISTED LIVING
SOUTH ELEVATION
SCALE: 3/32" = 1'-0"

INDEPENDANT LIVING
SOUTH ELEVATION
SCALE: 3/32" = 1'-0"



INDEPENDANT LIVING
EAST ELEVATION
SCALE: 3/32" = 1'-0"

THRIVE on 10th, Oklahoma City, Oklahoma



87th Apartments, Odessa, Texas



87th Community Center



87th Fitness Center



Windy Ridge Community Center Entrance



Windy Ridge Apartments, Austin, Texas

3.4 Developer References

3.4.1 Tax Credit Affordable Housing Development References

- 3.4.1.1 *Cynthia Bast*, Managing Partner-Austin Office, Affordable Housing Section lead, Locke Lord, cbast@lockelord.com; (512) 305-4707
- 3.4.1.2 *Lisa Albers*, Senior Vice President, Community Development Banking Group, BOK Financial, lalbers@bokf.com; (918) 588-6420
- 3.4.1.3 *Rich McCauley*, Executive Vice President, LITHC Syndication and Affordable Housing Financing, The Richman Group Affordable Housing Corporation, mccauleyr@richmancapital.com; (914) 420-1784
- 3.4.1.4 *Jill Miller*, Executive Director, Odessa Housing Finance Corporation, jtmiller@odessahousing.com; (432) 362-2349

3.4.2 Legacy MCS Construction References (see recommendation letters in Sec. 3.2)

- 3.4.2.1 *Harry Ben Adams, IV*, Real Estate and Development, McCombs Enterprises, hadams@mccombshq.com; (210) 268-8793
- 3.4.2.2 *Kevin Filer*, Vice President of Project Management, Sage Hotels, kevin.filer@sagehospitality.com; (720) 482-3080
- 3.4.2.3 *Emerson Prosser*, Director, Design & Project Management, Wyndham Worldwide, Emerson.Prosser@wyn.com; (407) 626-3663

McCOMBS ENTERPRISES

November 1st, 2016

To Whom It May Concern:

It is with great pleasure that I write this letter in support of Cass Brewer and his companies, Legacy DCS and Legacy MCS. I've had the privilege of working with Cass, intimately, for over four years. We've fought side-by-side together, competed, and won in the toughest real estate endeavor one can choose to compete in—the second home and resort community market. I know both his and his company's abilities, character, metal, and they are beyond reproach.

Cass and company began working for McCombs, in 2009, when one of our development partners retained their service in support of developing the Reserve at Lake Travis—a Hal Jones Development and McCombs Enterprises resort community in Austin. From the onset, Cass and his team's input, direction, and work were essential in supplementing the staff and knowledge of Hal Jones Development. Cass and company assisted our development partner in (i) repositioning the community to include designing and building a higher density vertical product offering, (ii) designing and building the community amenities, and (iii) designing and implementing the sales and marketing platform.

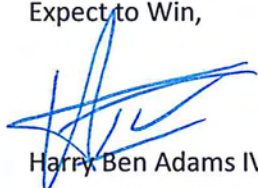
In late 2012, following the initial launch of the Reserve at Lake Travis, I joined McCombs Enterprises as the head of Real Estate and Development. In that capacity, I took on the management of the McCombs' family real estate portfolio—including ranch, timber, commercial real estate, commercial development, residential and resort development, and fixed assets. At the time, a good portion of our active portfolio was our resort communities and it was in that space that I first met Cass. In my initial assessment of our resort development partners, I found many areas lacking—but in Cass and Legacy, I found an asset we could leverage and grow. With that, our partnership called again on Cass and Legacy's talents to help reposition and launch a mothballed resort community in Rockport, The Reserve at St. Charles Bay. The following year we cleaned up the community and built a vertical product offering which we took to market, with great success, in the summer of 2014. A year later, in the summer of 2015, McCombs made the decision to assume control of another large resort community from a development partner—Palmilla Beach Golf and Resort Community. Upon assumption of the project, I rallied Cass and the balance of our resort team and put together a plan to re-activate and truly launch the project. Throughout that process, Cass and Legacy's experience and talents were essential to McCombs moving quickly and with mass to effect a material change in the community's performance.

Along the run, we've continued to grow not only the number of communities in which Cass works with us, but also the number of product lines we offer in each community. Today, in partnership with Cass and Legacy, we sell and deliver seven different product lines across the three communities (i) Villas, Cottages, and Cabins at the Reserve at Lake Travis, (ii) Bay Cottages, Canal Cottages, and Villas at the Reserve at St. Charles Bay, and (iii) townhomes at Palmilla. In addition to the active product lines, across the three communities, we've got four additional lines under development. At the end of day, the results of our efforts together can best be measured by the number of happy owners we've delivered

properties to and the volume of revenue we've brought to our projects. In total, Cass and Legacy have delivered 70 properties and \$56,000,000 in revenue for our communities with an additional 28 properties and \$28,000,000 underway now.

In closing, anyone who's operated in the home building business knows how challenging it can be. Labor challenges, material challenges, capital challenges, weather challenges, client challenges, and market challenges—in working intimately with Cass, I've seen him meet each of these challenges, head on, and overcome whatever obstacle was in his way. He never quits, never gives up, and doesn't stop until the mission is accomplished. While, for selfish reasons, I'd love to maintain all of Cass and Legacy's capacities for my projects, I'd be remiss with that decision. With that, I pass along my highest of recommendations for Cass Brewer and his Legacy Companies—if you give them a mission, they will accomplish it.

Expect to Win,



Harry Ben Adams IV

Real Estate and Development



1575 Welton Street, Suite 300 Denver, CO 80202

November 4, 2016

RE: Legacy MCS

To whom it may concern,

I am writing this letter to recommend the services of Legacy MCS. I was the Senior Director of Development for Wyndham Worldwide responsible for both timeshare and hotel projects throughout the USA. During the past year and a half, Wyndham has been working with Legacy MCS on a 100-unit time share project in Marble Falls, Texas. The project included 2 and 3-story buildings with 1-bedroom, 2-bedroom and 3-bedroom units as well as an activities/check-in building and sales center. This project is particularly complicated due to the significant grade on a very small site requiring 35 foot MSE walls to support the building pads. Legacy MCS has handled the challenges of this project in a very capable and professional manner. Their budgeting, paper work and construction execution are all of high quality and their crews are well supervised, responsive and professional. The Marble Falls project is aggressively managed and, to date, being completed within budget and to schedule. Additionally, they are honest, efficient and have their client's well-being foremost in their minds.

I am very pleased to offer the highest possible recommendation that you consider Legacy MCS for the needs of your company. I strongly recommend their services and I am looking forward to working with the company again on future projects. If you have any questions, please feel free to contact me.

Sincerely,

KEVIN FILER

Vice President of Project Management

D 720.482.3080 M 407.496.7672

E kevin.filer@sagehospitality.com

1575 Welton Street, Suite 300
Denver, CO 80202
www.sagehospitality.com



Emerson Prosser
 Director, Design & Project Management
 Strategic Development
 Wyndham Worldwide
 6277 Sea Harbor Drive
 Orlando, FL 32821

RE: Legacy MCS

To Whom it may Concern,

Legacy's partnership with Wyndham began a year and a half ago when contracted to build our 94-unit Vacation Ownership Property, *WorldMark Marble Falls, Texas*. A campus style project perched on a steep hill overlooking Lake Marble Falls, the project scope consisted of constructing seven new residential buildings, a new Check-in & Amenities building, a Maintenance building and the renovation of two existing buildings that had been left to rot.

Before vertical construction could begin on the new buildings, complex site conditions required Legacy to lead collaboration amongst our team of Architects and Engineers to arrive at the most affective building foundations. While this created unforeseen setbacks, the Legacy team worked collaboratively with Wyndham to minimize delays.

Given Wyndham's shortage of inventory for the WorldMark Brand, it was imperative the buildings be delivered in phases. Again, Legacy met the task of creative problem solving. As with any large construction project, there have been complications - Large amounts of rain, owner changes and general incidents were all met with professionalism that has allowed us to stay on tract.

As a testament to quality, the units that have been turned over in the first two phases are already receiving exceptionally high guest reviews, despite the project not being fully completed.

Legacy is a uniquely qualified operation that has offered Wyndham the attention of a family run business with the expertise of a large corporation. From the quality of onsite supervision to the proficiency of their in office support, Legacy is structured for success.

Sincerely,

A handwritten signature in blue ink, appearing to read "Emerson Prosser".

Emerson Prosser
 T: (407) 626-3663
 Emerson.Prosser@wyn.com



9-23-20

Mr. Cass Brewer
Legacy MCS Construction
205 Wild Basin Rd South
Austin Texas 78746

Cass,

I would like to commend your company on finishing successfully our project in Austin, Flats of Mariposa. This was an extremely difficult project as it was situated next to our existing Easton Hills complex, with Mariposa being a six story, 122 unit project with very tight quarters being constructed on one acre. The material storage and parking was handled very efficiently so that our Easton Hills projects maintained a 98% occupancy during the 16 months of construction.

As with all construction projects there were challenges but Legacy MCS rose to handle these with speed and efficiency. As we know dealing with the City of Austin and Austin Energy presented most of our challenges but your experience proved invaluable to the overall success of our project. When finished our project was a beautiful six story building, exceeding our expectations. We are approaching 90% occupancy since we started in January of this year and with the Covid19 situation we feel blessed. I would feel confident recommending Legacy MCS to any of your future clients and look forward to using your firm on our next project.

Thanks Again,

Steve Pagura
Managing Partner
Flats on Mariposa



August 2, 2021

To Whom It May Concern:

It is with great pleasure that I submit my unconditional recommendation for Legacy DCS, all of its subsidiaries, Carrie Brewer and Cass Brewer (hereafter collectively referred to as "Legacy").

I have had the fortune to include Legacy as a client since 2008. During this time, I have originated over 120 loans to Legacy that total tens of millions of dollars. In addition to lending activity, Legacy is also a depositor.

At this time, Legacy's relationship includes a multi-million dollar Guidance Line of Credit and dozens of deposit accounts. All loans and deposit accounts have been well maintained and are in good standing.

My loan history to Legacy has been primarily related to construction. The projects have typically been in the Greater Austin area but also include the Texas Gulf Coast. These include:

- single family residential properties (typical lot/block designation and condo regime)
- attached single family residential
- multi-family residential
- residential rehabilitation
- land development
- commercial

Throughout the years, Legacy has exemplified professionalism, dependability and has demonstrated a high quality of character. Examples include:

- all projects completed on time and within budget
- property taxes paid on time
- insurance has been adequate with no lapse in coverage
- deposit accounts properly maintained with zero insufficient items
- construction advances supported by work that has already been completed
- on-site supervision of their projects
- delivery of a quality product
- environmentally thoughtful
- community focused

Legacy and I have a long history. The group has continuously exemplified quality product, high character and community focus. It is my honor to provide Legacy with my highest level of support.

Respectfully,

Ronnie Shoemaker
Relationship Manager/Senior Vice President
Independent Bank
rshoemaker@ibt.com
(512) 931-0077

3.5 Developer Team Previous Litigation

Legacy Impact Housing, Legacy MCS, Legacy DCS, Brewer Design Studio, Bowman Engineering, True Casa Consulting, and Alice Glasco Consulting have not been party to litigation during the previous five years. Mark Odom Studio explains a legal case to which it is party in its company experience bio in Section 3.2. The parent business of HomeBase, the Austin Habitat for Humanity, has been party to two cases of litigation related to its retail operation, ReStore. HomeBase does not have an operational role in ReStore; therefore, this is should not be considered an HomeBase issue. Alpha Barnes Real Estate Services has been subject to litigation typical to what every property management company experiences for incidents such as slip and fall, fair housing, and ADA compliance; issues of design or construction execution rather than management.

3.6 Development Team Operational Capacity

Legacy Impact Housing, Legacy MCS, and Legacy DCS possess the staff and business resources to manage the full breadth of assignments to address and manage the Altitude East housing development scope of work. By placing the Altitude East development into the firm's development pipeline, critical resources will be identified and reserved to execute the development plan. Craig Alter will engage and manage the consultants previously presented to prepare the project design, seek all governmental approvals needed to construct the project, secure the financing, close the land acquisition and financing, and provide owner's representation construction oversight.

Simultaneously, Andy Brewer and Greg Cole (Legacy MCS) will provide project design guidance to the architect and civil engineer to achieve the target project budget, bid the construction plans, enter into a contract with the project owner partnership to construct the project, award the construction contract sub-contracts, and perform all general contractor functions through construction acceptance and warranty.

Carrie Brewer and Brewer Design Studio staff will assist Legacy Impact Housing and Legacy MCS in establishing the project design vision, reviewing the architectural plans and specifications, and selecting finish materials. The land development experts within Legacy DCS will be made available as needed for issues arising in the areas of zoning, subdivision, site plan, and permitting processes. The Legacy team of financial personnel led by CFO, Jack Johannesmeyer, will administer the tax credit equity installment and construction loan requests and from which produce, process, and pay all construction draws while maintaining the project partnership financial records.

Simply put, development of housing communities such as Altitude East is exactly what the Legacy family of companies was created to do and accomplishes every day.

4.0 FINANCIAL FEASIBILITY

4.1 Development Financial Spreadsheets

The requested development financial spreadsheets provided within the RFP are included on the following pages. The apartment and home ownership development components of the overall development plan are presented separately because separate development financing will support each activity.

Development Budget - Apartments

Acquisition	\$	1,980,000
Pre-development Budget	\$	2,347,236
Site Work	\$	2,450,000
Infrastructure (in site work)	\$	-
Hard Costs	\$	38,433,225
Soft Costs	\$	9,199,754
Developer Fee	\$	6,904,747

Total Development Budget	\$	61,314,962
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Development Budget - Home Ownership

Acquisition	\$	980,000
Pre-development Budget	\$	515,655
Site Work	\$	2,200,000
Infrastructure	\$	278,250
Hard Costs	\$	4,590,000
Soft Costs	\$	887,211
Developer Fee	\$	438,593

Total Development Budget	\$	9,889,709
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15-yr Rental Housing Operating Proforma

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.

Revenue	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5	YEAR 10	YEAR 15
Gross Annual Income (less vacancy loss and concessions)	\$3,238,821	\$3,301,303	\$3,367,329	\$3,434,675	\$3,503,369	\$3,868,002	\$4,270,587
Revenue Subtotal	\$3,238,821	\$3,301,303	\$3,367,329	\$3,434,675	\$3,503,369	\$3,868,002	\$4,270,587
Operating Expenses & Reserves							
General & Administrative Expenses	\$100,000	\$103,000	\$106,090	\$109,273	\$112,551	\$130,477	\$151,259
Management Fee	\$129,553	\$132,144	\$134,787	\$137,483	\$140,232	\$154,828	\$170,942
Payroll, Payroll Tax & Employee Benefits	\$342,720	\$353,002	\$363,592	\$374,499	\$385,734	\$447,172	\$518,395
Repairs & Maintenance	\$158,500	\$163,255	\$168,153	\$173,197	\$178,393	\$206,807	\$239,745
Electric & Gas Utilities	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Water, Sewer & Trash Utilities	\$225,000	\$231,750	\$238,703	\$245,864	\$253,239	\$293,574	\$340,333
Annual Property Insurance Premiums	\$112,500	\$115,875	\$119,351	\$122,932	\$126,620	\$146,787	\$170,166
Property Tax	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Reserve for Replacements	\$75,000	\$77,250	\$79,568	\$81,955	\$84,413	\$97,858	\$113,444
Other Expenses	\$42,450	\$43,724	\$45,035	\$46,386	\$47,778	\$55,388	\$64,209
Expenses Subtotal	\$1,185,723	\$1,219,999	\$1,255,278	\$1,291,588	\$1,328,961	\$1,532,890	\$1,768,494
Net Operating Income	\$2,053,098	\$2,081,304	\$2,112,051	\$2,143,087	\$2,174,408	\$2,335,112	\$2,502,093
Debt Service							
First Deed of Trust Annual Loan Payment	\$1,682,821	\$1,682,821	\$1,682,821	\$1,682,821	\$1,682,821	\$1,682,821	\$1,682,821
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	\$83,885	\$83,885	\$83,885	\$83,885	\$83,885	\$83,885	\$83,885
Other Annual Required Payment		\$0	\$0	\$0	\$0	\$0	\$0
Annual Net Cash Flow	\$286,392	\$314,598	\$345,345	\$376,381	\$407,702	\$568,406	\$735,387
Cumulative Net Cash Flow	\$286,392	\$600,990	\$946,335	\$1,322,716	\$1,730,418	\$4,170,688	\$7,430,169
Debt Coverage Ratio	1.16	1.18	1.20	1.21	1.23	1.32	1.42

Affordable Homes Sale Data

	Unit Model 1	Unit Model 2	Unit Model 3	Unit Model 4	Unit Model 5	Unit Model 6
Number of Units	4	23	17			
Number of Bedrooms	1	2	3			
Square Footage	900	1100	1300			
Anticipated Sale Price	\$211,400	\$249,400	\$285,000	\$0	\$0	\$0
Borrower Contribution	\$5,000	\$5,000	\$5,000	\$0	\$0	\$0
Homebuyer Down Payment	\$21,140	\$24,940	\$28,500	\$0	\$0	\$0
Total Principal Amount of Mortgage	\$185,260	\$219,460	\$251,500	\$0	\$0	\$0
Anticipated Interest Rate	4.50%	4.50%	4.50%	0.00%	0.00%	0.00%
Estimated Annual Property Taxes	\$2,875	\$4,025	\$5,175	\$0	\$0	\$0
Estimate Annual HOA Fees	\$750	\$750	\$750	\$0	\$0	\$0
Estimated Annual Insurance	\$750	\$850	\$950	\$0	\$0	\$0
Estimated Annual PITI	\$11,962	\$14,751	\$17,442	\$0	\$0	\$0

NOTES:

1. Borrower Contribution is the average down payment assistance paid by Legacy Impact Housing for persons needing assistance.
2. Property tax assumes \$100,000/home property value reduction generated by the Community Land Trust ownership of the underlying land.
3. Estimated home market value based on \$250/sf market comparable value.

4.2 Proposed Funding Sources

4.2.1 Apartment Development Funding

The apartment building, parking garage, and associated site improvements will be financed with a construction to permanent mortgage loan from FHA using the 221(d)(4) insured loan program, a construction bridge loan provided by another lender, tax credit equity installments from the investor partner, and deferred developer fee that is eventually paid through cash flow proceeds. Each of the following financing entities is committed to providing project financing subject to performing their typical underwriting due diligence after the project construction plans have been finalized; however, they cannot guarantee the terms will remain as presented in the following term sheets and letters of interest and must retain their ability to adjust to future market conditions prior to committing to final terms for closing. The attached anticipated FHA mortgage loan process timeline has been prepared by Berkadia Commercial Mortgage. The overall project schedule timing is also attached showing the tax credit and project design approval steps leading to closing all the financing at one time. All of the financing term sheets follow the lending and project schedules.

Berkadia Commercial Mortgage, LLC (A division of Berkshire Hathaway)

Construction Loan Amount (max): \$35,966,500

Permanent Loan Amount (max): \$35,966,500

The Richman Group Affordable Housing Corp.

Tax Credit Equity: \$24,077,701

Merchant's Bank

Construction Equity Bridge Loan \$17,700,000

Deferred Developer Fee \$3,394,570

4.2.2 For-Sale Home Development Funding

The for-sale homes' site and vertical construction financing will be separately sourced from the apartment development. All construction cost will be paid through a construction loan

provided by Bank of the Ozarks and builder equity. The projected construction loan amount is \$9,415,000. The Bank of the Ozarks loan term sheet will be found after the apartment financing term sheets.



TANNEHILL LANE APARTMENTS
ESTIMATED SCHEDULE FOR PROCESSING & COSTS
PREPARED 07/30/2021

Contact: Carolyn Whatley
Mobile: (561) 758-3171
Email: carolyn.whatley@berkadia.com

DIRECT TO FIRM - IF APPROVED BY HUD & UNDERWRITING

ENGAGEMENT & CONCEPT MEETING ESTIMATES						
Task	Est. Time	Start	Completion	Est. Cost	Est. Expiration	Comment
Engage Lender	3 Days	01/01/23	01/04/23	\$5,000		Lender engagement occurs upon completion of loan analysis and commitment to proceed.
Concept Meeting	30 Days	01/04/23	02/03/23	\$0		Includes time for collecting exhibits, preparing/submitting concept package, holding meeting and receiving response from HUD. Market study if determined necessary for Concept is estimated between \$8k - \$10k.

NOTE: If one item is delayed, it may cause a domino affect on the balance of the timeline. Timing based on calendar days.

DIRECT TO FIRM - 4% Bond Transaction						
Task	Est. Time	Start	Completion	Est. Cost	Est. Expiration	Comment
Phase I ESA & 4128	35 Days	02/10/23	03/17/23	\$5,000	08/16/23	Need final site plan to avoid possible updates to Environmental. Conditions may require additional reports as each site is unique.
8 Step Process	0 Days			\$0		TBD - only required if flood plain or wetlands.
Historical				\$0		TBD by Phase I ESA
Demo, Asbestos, Lead				\$0		TBD by Phase I ESA
Market Study	35 Days	03/05/23	04/09/23	\$10,000	06/26/23	Requires final unit mix within a week of engagement or it could cause delays.
Architectural Review	60 Days	03/20/23	05/19/23	\$15,000		80-90% complete plans and specs are required to start the architectural review. This schedule assumes they will be ready 45 days from receipt of the Concept Meeting approval to proceed. Final costs will also be required in order to begin the cost review. The GC may be able to start cost review with 80% complete plans, but typically needs to review final plans to finalize. Plans should also be submitted to the municipality for approval as soon as possible as the reviewer likes to see at least the first round of comments to confirm no material changes are required. This schedule includes time for initial plan review, response from your architect and final plan review to be issued.
Cost Review	14	04/10/23	05/19/23	\$10,000		See above notes. Initial cost review can be completed in approx. 2 weeks; however, plans must be finalized before final cost review can be approved.
Appraisal - Full	35 Days	03/05/23	05/19/23	\$13,000	06/26/23	Requires final unit mix within a week of engagement or it could cause delays. Draft appraisal typically issued in 30-35 days, but report typically isn't finalized until cost review is complete.
Finalize 3rd Party Reports & Complete Underwriting	21 Days	05/19/23	06/09/23			NOTE: Just prior to submitting the Application, Lender will need to verify availability of the cash & escrows required for the loan.
Submit to HUD / Firm Commitment	75 Days	06/11/23	08/25/23	\$33,554		HUD Application Fee. \$3/\$1000 of Mortgage Amount. Non-refundable. FIRM COMMITMENT EXPECTED Assumes HUD expedites review. OZ 0.10%. NOTE: HUD's standard review time is 60 days, excluding an intake review completed prior to underwriter assignment. HUD is currently experiencing a queue for underwriter assignment. Please check back with us for current queue estimates, not in this schedule.
Good Faith Deposit	1	08/25/23	08/26/23	\$167,770		Due upon Commitment & at rate lock. Returned after closing, non-refundable if not closed.
Rate Locked	1	08/26/23	08/27/23			All critical items for all parties must be resolved prior to locking rate.
Bond Resolution Adopted						
Reprocess Final L/A Forms w/HUD	5	08/27/23	09/01/23			
1st Draw w/Support to Lender	-25		08/28/23			Call for invoices to be paid at Initial Endorsement
Closing Package Submitted to HUD	3	08/27/23	08/30/23			Title & Survey long lead items!
Bond Validation						
Post Bonds	7		09/02/23			Week before pricing bonds.
Confirm Closing Date w/HUD ("pencil in date")	10	08/27/23	09/06/23			This is not the closing date, just when HUD will tell us what day we will close. Subject to satisfaction of all requirements.
Price Bonds	3		09/09/23			Need HUD to confirm closing date prior to pricing.
Clear to Close by HUD Legal & Housing	21	08/30/23	09/20/23			Assumes HUD review of closing package complete in 3 weeks.
Bonds Pre Closing	1		09/21/23			
Pass Papers at HUD	1		09/22/23			
Close on Bonds	1 Days	09/22/23	09/23/23			Legal Retainer to start early - 15 days prior to receiving Commitment.
				\$254,324	Sub Total Funds Required For Application Process	
				\$259,324	Total Funds Required for Concept Meeting, Pre-Application & Application	
				\$167,770	Less Good Faith Deposit to be returned after closing.	
				\$91,554	Estimated Costs For Processing & Underwriting (Excluding Good Faith)	

APPLICATION MUST BE SUBMITTED BY: 06/26/23
ESTIMATED LOAN AMOUNT: \$ 33,554,000

Based only on these assumptions. May be submitted earlier if plans & costs completed earlier.

09/01/23 Deadline to Submit based on Concept Green Light 120 days.

NOTE 1: BORROWER MUST PROVIDE BUILDING PERMITS AT LEAST 1 WEEK PRIOR TO EXPECTED CLOSING DATE.

NOTE 2: ALL ABOVE COSTS ARE ESTIMATES AND ARE INCLUDED IN THE MORTGAGE WITH THE EXCEPTION OF THE GOOD FAITH DEPOSIT WHICH IS RETURNED UPON SETTLEMENT OF THE GINNIE MAE SECURITY. THE GOOD FAITH DEPOSIT NON-REFUNDABLE IF THE LOAN DOES NOT CLOSE FOR ANY REASON. THE OTHER EXPENSES MAY BE REIMBURSED FROM MORTGAGE PROCEEDS BUT ARE NON-REFUNDABLE IF THE LOAN DOES NOT CLOSE.

Legacy Impact Housing - 3811 Tannehill Lane Development Schedule

Key	
	- Austin HFC RFP and development incentive approval processes
	- City of Austin zoning and permitting steps
	- Private activity bond sequence
	- Tax credit application process
	- Architectural construction plan development & approval
	- Project construction & mortgage loans and tax credit equity
	- Project construction progress
<i>Critical path items</i>	

<u>Date</u>	<u>Activity</u>
5-Aug-21	RFP response due date
8-Sep-21	RFP Response scores released by AHFC
10-Sep-21	RFP's available for public review
4-Oct-21	AHFC Executive Team Recommended RFP announced
2-Nov-21	AHFC Board selects RFP Proposal. Start Development Agreement Negotiation
1-Feb-22	Execute Development Agreement
Feb-22	Submit Affordability Unlocked Application
Feb-22	Request SMART Housing designation/obtain certification letter
Feb-22	Zoning meeting with neighborhood org prior to submitting zoning application
Mar-22	Hold SMART Housing project applications pre-submittal meeting
Mar-22	Follow-up neighborhood zoning request meeting
Apr-22	Initiate zoning request & neighborhood plan amendment
Jun-22	Submit AHFC partnership and bond inducement application
Jul-22	Negotiate & finalize AHFC partnership MOU
Aug-22	AHFC Bond inducement
Aug-22	Request State Rep and City Council resolutions of support
Oct-22	Submit Priority 1b or 2 bond lottery application to TBRB
Oct-22	Zoning change approved by City Council
Oct-22	Start tax credit application preparation

Nov-22	Participate in bond lottery
Nov-22	Start site plan civil engineering
Nov-22	Start architectural design
Dec-22	Start subdivision civil engineering
Jan-23	Submit tax credit application
Jan-23	Start FHA 221d4 loan application process
Feb-23	Submit civil site plan to COA for review
Feb-23	Submit subdivision plat to City of Austin
Mar-23	<i>Start FHA construction plan and cost review</i>
Mar-23	Solicit tax credit equity letters of interest
01-Apr-23	<i>Receive bond reservation</i>
Apr-23	Submit architectural construction plans for building permits
May-23	Apply for construction loan
May-23	Tax credit application approved by TDHCA Bd
May-23	Start tax credit investor due diligence
Aug-23	Subdivision plat approved by City of Austin
Aug-23	Site plan approved by City of Austin
Aug-23	Building Permits issued by City of Austin
Aug-23	HUD sets FHA loan closing date
22-Sep-23	<i>Close bond & project financing</i>
Oct-23	Start development construction
Sep-24	Apartment occupancy begins
Oct-24	Home sales begin
Mar-25	Home sales completed
Apr-25	Apartment construction completed
Jul-25	Achieve apartment occupancy stabilization



July 30, 2021

Mr. Craig Alter
Legacy Impact Housing
3101 Bee Cave Rd., Suite 305
Austin, Texas 78746

Subject: Tannehill Lane – Section 221(d)(4) New Construction (“Property”)

Dear Mr. Alter:

Berkadia Commercial Mortgage LLC (“Berkadia”) is pleased to present you with this proposal to provide financing for Tannehill Lane, a proposed 250-unit affordable multifamily development supported by 4% Low Income Housing Tax Credits. The insured loan will be processed under Section 221(d)(4), providing construction and permanent financing for the Property. This is an estimate of the terms and conditions that will be offered subject to final underwriting and approval of Berkadia’s credit committee and HUD.

BORROWER: TBD. A to-be-formed single asset entity formed for the development and ownership of the Property

FHA/HUD PROGRAM HUD 221(d)(4) – New Construction utilizing 4% LIHTC

LOAN AMOUNT: Construction: \$35,966,500
Permanent: \$35,966,500

LOAN TO COST: Not to exceed 87% of HUD Mortgageable Costs

DEBT SERVICE: Minimum ratio of 1:1.15x.

INTEREST RATE: 3.00% Note Rate estimate, determined at time of rate lock, plus 0.35% mortgage insurance premium.

TERM/AMORTIZATION: 40 year amortized term + interest only Construction period; or 75% of estimated remaining useful life determined by HUD.

FINANCING FEE: 1.00% of the Insured Loan Amount, payable at close to Berkadia.

PERM. PLACEMENT FEE: 0.30% of the Insured Loan Amount, payable at close to Berkadia; includes all lender legal, closing, and processing costs.

HUD FEE: Application Fee of 0.30% of the Insured Loan Amount, payable to HUD prior to Application + MIP and inspection at closing and during construction.

ASSUMPTIONS: Property must receive 4% LIHTC Allocation. LIHTC investor will approve final HUD underwriting guidelines related to loan to cost and debt service constraints. LIHTC installments will meet HUD underwriting guidelines.

The above is subject to final approval by HUD and Berkadia's Loan Committee, as well as final review of the updated scope of work by a third party architectural and cost reviewer performed by Berkadia/HUD approved vendors. Please note that the interest rate stated above is the current market rate. The actual rate is locked in prior to closing and may be more or less than the above, and may impact the loan amount stated above.

We are pleased to offer this financing and appreciate the opportunity to work with Legacy Impact Housing on this transaction. If you have any questions, I can be reached at (770) 286-6446 or via email at heather.olson@berkadia.com.

SIGNED:



By:

Berkadia Commercial Mortgage LLC
Heather Olson
Managing Director

SUMMARY OF TERMS AND INDICATIVE PRICING AS OF July 29, 2021

On behalf of Merchants Bank of Indiana ("MBI"), I am pleased to present you with the following financing Letter of Intent (LOI) proposal.

PROJECT NAME:	Tannehill Lane Apartments
PROJECT LOCATION:	3811 Tannehill Lane Austin, TX 78721
PROJECT DETAILS:	Units: 250 Affordability Information: 100% Affordable (30%, 40%, 50%, 60%, and 70% AMI units). New Construction
SPONSOR:	Legacy Impact Housing
BORROWER:	LIH Tannehill, LLC
PURPOSE:	MBI Provides Bridge Loan of Tax Credit Equity
LOAN AMOUNT:	\$17,700,000
INTENDED LOAN TAKEOUT:	N/A. This is a LIHTC Bridge Loan. Tax Credit Group is the Richman Group. Anticipated to be paid back by Equity Installments #2 and #3 is over \$18.25 MM. 4 th LIHTC Equity Installment will also be tied to this loan, but loan anticipated to be paid in full at stabilization (anticipated in month 24).
COLLATERAL:	Deal secured by Tax Credits (a) Assignment of LIHTC equity installments. (b) Assignment of GP interest. (c) Any additional collateral as determined by MBI.
TERM (Including any extensions):	30 Months.
AMORTIZATION:	Interest Only
PRICING:	Floating. 1 Month SOFR* + 3.10% *SOFR requires floor of 0.65%.
FINANCE FEE:	1.25%
EXIT FEE:	N/A

GUARANTY STRUCTURE:	<p>Guarantors to be Legacy Impact Housing, Legacy MCS, Legacy DCS</p> <p>Unlimited and unconditional guarantee.</p>
RESERVE/ESCROW REQUIREMENTS:	N/A
COVENANTS	<p><u>Distributions:</u> No distributions on Construction Loans (HVCRE requirement)</p> <p><u>Performance Covenant:</u> None Anticipated. To Be Fully Reviewed as this is new construction.</p>
OTHER LOAN CONDITIONS:	<ol style="list-style-type: none"> 1. Full underwriting information including but not limited to: <ul style="list-style-type: none"> - Finalized Draw Schedule - Flow of Funds - Executed LOI for LIHTC purchase - All required due diligence items including but not limited to: Appraisal, Phase I, PCR, and survey. 2. Guarantor(s) acceptable to Bank 3. Additional loan conditions as determined by Merchants Bank

This is not a commitment to make a loan but a summary of proposed terms for a loan to Borrower. All terms are subject to final approval of the MBI's loan committee and credit approval process. This Summary of Terms does not contain every condition that will be imposed by MBI such as late charges, default rates, insurance requirements, and other protective covenants. The loan documents shall contain representations and warranties; affirmative and negative covenants and defaults customarily found in MBI's credit agreements for similar financings and others appropriate in the judgment of MBI for this transaction.

At the time this Summary of Terms is accepted for application, Borrower will deliver to MBI a \$8,000 application deposit.

(a) \$2,000 of which is a non-refundable processing fee, deemed to be earned by MBI upon receipt thereof, for the purpose of reimbursing MBI for certain Loan costs such as credit checks, zoning confirmations, travel expenses, and other miscellaneous processing expenses; and

(b) \$6,000 of which is a deposit for anticipated legal expenses (the "Legal Deposit"); and

(c) the remaining \$0* of which (the "Reports Deposit") will be used to reimburse MBI for the costs to obtain third-party reports deemed by MBI to be necessary or appropriate. These third-party reports currently are expected to include but are not limited to an appraisal, an environmental report, and a Plan Cost/Physical Risk report. MBI will require reliance language on third party reports but will not require any separate third-party reports as long as required reports are provided for review.

*It is anticipated that MBI will be able to rely on third party reports ordered by the construction lender and/or the tax credit equity provided. Third party reports will be required to be reviewed.

Borrower agrees to reimburse MBI for its third-party fees (none anticipated) and costs incurred in conjunction with the Loan, including, but not limited to, legal fees, regardless of whether the Loan closes. Any costs above and beyond the aforementioned estimated amount will be due from Borrower. If the total costs of such reports are less than the Legal Deposit and Reports Deposit and no other sums are due from Borrower to MBI hereunder or in connection with the loan, then the remainder will be refunded to Borrower at the closing of the loan. MBI shall not be liable or accountable in any way if, after MBI's analysis of the appraisal, engineering report and other third-party reports, MBI is unable to provide the loan terms set forth above or other loan terms acceptable to Borrower.

MBI, at its sole discretion, may solicit other lenders to participate in the loan or to become co-lenders in a loan syndication led by MBI (each, a "Potential Lender"). In connection therewith, Borrower acknowledges that MBI may be asked to provide to each Potential Lender all information in MBI's possession regarding the loan including, without limitation, the collateral that will secure the loan and financial information relating to the borrower and guarantors (collectively, the "Loan Package Information"). The undersigned person or party executing this Summary of Terms, on its behalf, and on behalf of each guarantor, consents to MBI providing the Loan Package Information to any Potential Lender.

If the provisions hereof are acceptable to you, please confirm Summary of Terms. This Summary of the Letter of Intent expires 30 days from the date of issuance.

Sincerely,

By: 

Marsha Goff, Executive Vice President

By: 

Joseph Krengel, Senior Vice President

By: _____

Kevin Magli, Vice President



410 Monon Blvd.
Carmel, IN 46032
Phone: 317-324-4660
merchantsbankofindiana.com

ACCEPTED:

By: _____

Date: _____

Name: _____

Title: _____





410 Monon Blvd.
Carmel, IN 46032
Phone: 317-324-4660
merchantsbankofindiana.com

Money Transfer Instructions:

ACH Instructions:

Merchants Bank of Indiana

ABA# 074909153

Account # 54193

Merchants Capital Corp.

Attn: Kim Coar (317) 805-4316

Ref: [Tannehill Lane Apartments](#)

Wire Transfer Instructions:

Merchants Bank of Indiana

3737 E. 96th Street

Indianapolis, IN 46240

ABA# 074909153

Account # 54193

Merchants Capital Corp.

Attn: Kim Coar (317) 805-4316

Ref: [Tannehill Lane Apartments](#)





*777 West Putnam Avenue
Greenwich, CT 06830
(p) 203.869.0900*

July 29, 2021

Mr. Craig Alter
Legacy Impact Housing Inc.
3100 Bee Cave Road
Suite 305
Austin, TX 78746

Re: Tannehill Lane Apartments

Dear Mr. Alter:

The Richman Group Affordable Housing Corporation ("TRG") is the sponsor of investment partnerships which provide equity capital for multi-family apartment complexes that are eligible for low-income housing tax credits ("Low-Income Housing Tax Credits") pursuant to Section 42 of the Internal Revenue Code of 1986 (the "Tax Code") by investing in limited liability companies that own such apartment complexes.

You have advised us that LIH Tannehill MM LLC, (the "Managing Member"), a to-be-formed, single-purpose, for-profit entity, will form LIH Tannehill, LLC a Texas limited liability company (the "Company"), which intends to construct a project located in Austin, Texas (the "Apartment Complex").

TRG is pleased to provide you with this non-binding letter of intent for the acquisition by an affiliated limited partnership, which will be sponsored by TRG ("Investor"), of a 99.98% membership interest in the Company, subject to the terms and conditions hereof. Upon the execution of this letter, TRG will commence its due diligence review and will hold an initial investment committee meeting. Upon approval of the initial investment committee, TRG may continue its due diligence and will seek an investor to acquire the membership interest. Receipt of initial investment committee approval is not, and should not be construed as, an indication that the transaction will receive final investment committee approval. Only upon (i) the receipt of final investment committee approval, (ii) negotiation and execution of documentation acceptable to both parties, and (iii) receipt of opinions of counsel (including corporate, tax and real estate) acceptable to the Investor, will the parties execute an amended and restated Operating Agreement of the Company in the Investor's standard form (the "Operating Agreement"), admitting the Investor to the Company. Legacy Housing Impact, Inc., Legacy MCS and Legacy DCS (collectively, the "Guarantor") will guarantee the Managing Member's obligations to the Investor.

1. Financing: Financing of the Apartment Complex will be subject to Investor approval. You have informed us that the Apartment Complex is expected to receive financing as follows:

Loan type	HUD 221(d)4	Def Dev Fee
Loan Amount - not to exceed:	33,554,000	2,430,671
Interest rate - not to exceed (excluding MIP)	4.00%	3.00%
Loan term not less than (yrs)	40	15
Amortization period (yrs)	40	Subject to cash flow
Cashflow loan?	n	y

2. Capital Contributions of the Investor: Subject to the terms and conditions set forth in a letter of intent and the Partnership Agreement, the capital contributions are expected to be **\$24,077,701** (the "Capital Contribution") paid in based upon the following milestones:

Installment No. 1: **20.00%** **\$4,815,540**

Paid upon the later of initial closing and admission of the Investor to the Partnership.

Installment No. 2: **40.00%** **\$9,631,080**

Paid upon 100% completion of construction of the Apartment Complex.

Installment No. 3: **35.00%** **\$8,427,196**

Paid upon the latest of 100% qualified occupancy, achievement of stabilization, final closing/ conversion of all permanent financing and funding of the operating reserve.

Installment No. 4: **5.00%** **\$1,203,885**

Paid upon receipt of 8609s.

Total capital contributions to the Partnership: **\$24,077,701**

3. The capital contribution amount stated above is based upon your projection of an annual amount of Low-Income Housing Tax Credits of **\$24,077,701** ("LIHTC") and equity pricing of \$0.88 per LIHTC. The actual amount of Low-Income Housing Tax Credits may in fact change after the determination of eligible and qualified basis. Accordingly, the Capital Contribution shall be adjusted so that the ratio of the Capital Contribution attributable to the Low-Income Housing Tax Credits divided by the Final LIHTC per the 8609s allocable to Investor is equal to **88.00%** ("LIHTC Ratio").
4. The current equity pricing is based in part on the currently projected timeframes below:
- | | |
|---|------------|
| Start of rehab/construction: | 10-01-2023 |
| Substantial completion: | 04-01-2025 |
| 100% qualified occupancy | 07-01-2025 |
| % of a full year's LIHTC delivered in 2024: | 8.33% |
| % of a full year's LIHTC delivered in 2025: | 87.50% |

5. Cash Flow Distributions: Cash flow of the Company after expenses and debt service will be distributed, to the extent available, according to the following priority:

First: to pay any credit adjuster due;

Second: a priority distribution to the Investor in the amount of \$5,000 annually;

Third: to pay any deferred development fee to the developer plus interest compounded annually at the rate shown in Paragraph 1 above;

Fourth: to replenish the Operating Reserve to the amount initial funded if any amounts have been withdrawn;

- Fifth: to repay any operating deficit loans made by the Managing Member; and
- Sixth: remaining amounts split 10% to the Investor and 90% to the Managing Member.

To the extent that the Investor does not receive a minimum distribution of \$5,000 in any one year beginning in 2024, the Managing Member shall pay the shortfall to the Investor.

6. Sale or Refinance: Upon the sale of the Apartment Complex or a refinancing of the permanent mortgage loan, proceeds will generally be allocated in accordance with the following priority:

- First: Expenses of the sale and refinancing and satisfaction of underlying financing plus any other third-party obligations and debts;
- Second: Return of the outstanding balance of any operating deficit loans previously made by the Managing Member (See Guarantees); and
- Third: Balance of proceeds split 10% to the Investor and 90% to the Managing Member.

7. Guarantees: The Managing Member and the Guarantor shall jointly and severally guarantee the obligations of the Managing Member under the Operating Agreement, including, without limitation, the following:

(A) Against recapture of the Low-Income Housing Tax Credits for 15 years except for recapture caused by (i) subsequent changes in the Tax Code or (ii) transfers of the Investor's interest in the Company .

(B) The payment in full of all costs and expenses of the construction of the Apartment Complex in excess of the proceeds of all the construction period sources of funds and any operating deficits prior to the achievement of Breakeven Operations.

(C) To fund operating deficits for a five (5) year period (the "Operating Deficit Period") from the later of Breakeven Operations or funding of the permanent mortgage loan up to a maximum amount equal to six months of operating expenses, replacement reserve deposits and mandatory debt service, currently estimated at \$1,434,272 (the "Operating Deficit Guaranty"). In addition, the Operating Deficit Period shall be deemed extended until (x) the Managing Member has provided the Investor with evidence that the Company has sufficient cash reserves to pay any accrued expenses as of the expiration of the Operating Deficit Period and (y) the Apartment Complex has achieved the "DSC Requirement" as hereinafter defined, and (z) the operating reserve under the Operating Agreement has been fully replenished from net cash flow, if any portion of the operating reserve has been expended. The "DSC Requirement" means that the Apartment Complex has demonstrated a debt service coverage ratio of 1.15:1 for years four and five of the Operating Deficit Period. If the Apartment Complex has not demonstrated a 1.15:1 debt service coverage for such years, then the Operating Deficit Period will be extended until the Apartment Complex demonstrated a 1.15:1 debt service coverage for a 24-month period. For purposes of the Operating Deficit Guaranty, the term "Operating Deficits" shall include amounts withdrawn from the reserve for replacements for non-capital costs during such five (5) year period. A further assurance will be an agreement by the managing agent for the Apartment Complex, typically the Managing Member or an affiliate, (the "Managing Agent") to (i) defer and accrue its management fee, if necessary, to prevent a default under the permanent mortgage loan and (ii) defer its fee to the extent necessary to avoid an Operating Deficit. If the Managing Agent elects not to defer its fee pursuant to subparagraph (ii) above, it must send a notice to the Managing Member and the Investor offering to resign. If no such notice is sent, the Managing Agent will be deemed to have ratified its agreement to defer its fee. If a notice is sent refusing to defer its fee, such refusal shall be grounds for removal of the Managing Agent.

An operating/debt reserve in the amount of not less than six months of operating expenses, replacement reserve deposits and mandatory debt service, currently estimated at \$1,434,272 (collectively, the "Operating Reserve") will be funded at or prior to payment of Installment No. 3. Subject to Investor approval,

any operating deficit reserves and debt service reserves required by the lenders or the Agency may be applied toward the obligation to fund the Operating Reserve described in the previous sentence, however, such other reserves must remain as a Company reserve account for the full term that the Operating Reserve is required with terms acceptable to the Investor.

Withdrawals made from the Operating Reserve will be subject to approval by the Investor. Withdrawals made from the Operating Reserve after achievement of Breakeven Operations will not count toward fulfillment of the Operating Deficit Guaranty described in the preceding paragraph. A minimum balance of half of the original amount must be maintained in the Operating Reserve during the Operating Deficit Period. Amounts withdrawn from the Operating Reserve must be replenished from available cash flow and the Operating Deficit Period shall be extended until such time that the Operating Reserve has been replenished to the original amount.

(D) Repurchase of the Investor's interest in the Company by payment to the Investor of the full amount of the gross Capital Contribution paid to such date, if the Managing Member fails to place the Apartment Complex in service, complete Final Closing, achieve Breakeven Operations or receive 8609s for all building in the Apartment Complex by certain dates as shall be described in the Operating Agreement.

8. Reserve Requirements: The Company will be required to make an annual minimum deposit to a reserve for replacements in an amount equal to the greater of (i) \$300 per unit per year, increasing by no less than 3% per annum, or (ii) the amount utilized in the underwriting of the mortgage loans by the lenders and/or HUD. The Investor may require that additional reserves be funded to cover potential cash deficiencies. The Operating Deficit Guaranty shall be increased by amounts withdrawn from the reserve for replacements for non-capital costs during the Operating Deficit Period.

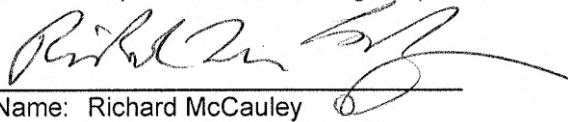
9. Payment and Performance Bond or Letter of Credit: The Contractor shall provide one of the following (i) payment and performance bonds in form and substance satisfactory to Investor, in the full amount of the general contract naming the Company as obligee issued by a bonding company acceptable to Investor, or (ii) a letter of credit in the amount of not less than 15% of the general contract price (excluding builder profit) issued by a bank acceptable to Investor.

The Closing of the acquisition of the membership interest is subject to the availability of funds and the ability of TRG to identify an Investor. The Capital Contributions set forth in Paragraph 2 above may be recalculated or changed prior to the Closing to reflect rising interest rates or other changing market conditions and the Investor's then-current yield requirements. This letter shall be governed by and construed in accordance with the internal laws of the State of Connecticut. This agreement shall not create any liability on the part of TRG or the Investor. All rights and obligation of the Investor shall be set forth in the Operating Agreement and shall not be binding on the Investor until the Investor delivers a fully executed copy of the Operating Agreement to the Managing Member.

Notwithstanding anything to the contrary contained herein, the provisions of this letter represent the entire understandings of TRG, the Investor, the Managing Member and/or the Company with respect to the matter hereof, and all prior understandings, agreements and representations with respect thereto whether written or oral are superseded hereby and merged herein. None of the provisions of this letter may be waived or modified unless such waiver or modification is in writing and signed by the parties hereto and approved by TRG's counsel. No oral agreements shall ever be binding on TRG and/or the Investor.

Sincerely,

The Richman Group Affordable Housing Corporation

By: 
Name: Richard McCauley
Title: Executive Vice President

Agreed to and accepted as of

_____, 2021
by the undersigned

LIH Tannehill, LLC, a to-be-formed Texas limited liability company

By: LIH Tannehill MM, LLC, its to-be-formed managing member

By: _____

Name: Craig Alter

Title:



SUMMARY OF TERMS AND INDICATIVE PRICING AS OF August 3, 2021 On behalf of Bank OZK, I am pleased to present you with the following financing Letter of Interest (LOI) proposal.

PROJECT NAME:

Tannehill Lane Homes

PROJECT DETAILS:

Construction of four (4) - one bedroom, 23-two bedroom and 17- three bedroom attached homes. All homes to be priced for individuals with income not exceeding 80% AMI.

PURPOSE:

Attached Residential Construction Loan:
Four building types are proposed, nine total:

Bldg A x 2- 7 units/bldg.

Bldg B x 4- 5 units/bldg.

Bldg C x 1- 4 units/bldg.

Bldg D x 2- 3 units/bldg.

SPONSOR:

Legacy Impact Housing

BORROWER:

LIH Tannehill, LLC

LOAN AMOUNT:

\$9,415,000

INTENDED LOAN TAKEOUT:

Homebuyers mortgages will pay down loan

COLLATERAL:

Improvements, materials & leasehold

TERM (Including any extensions):

30 Months.

AMORTIZATION:

Interest Only & floating daily

PRICING:

WSJ Prime + 1.25% floor of 4.5%

FINANCE FEE:

1.00%

EXIT FEE:

N/A

GUARANTY STRUCTURE:

Guarantors to be Legacy Impact Housing, Legacy MCS, Legacy DCS

Unlimited and unconditional guarantee.

RESERVE/ESCROW REQUIREMENTS:

Interest, Insurance & Tax

COVENANTS

Distributions:

- No distributions on Construction Loans (HVCRE requirement)

Performance Covenant:

- Minimum pre-sale requirement to be determined by Bank OZK

OTHER LOAN CONDITIONS:

1. Full underwriting information including but not limited to:
 - Finalized Draw Schedule
 - Flow of Funds
 - All required due diligence items including but not limited to: Appraisal, Phase I, PCR, and survey.
2. Guarantor(s) acceptable to Bank
3. Additional loan conditions as determined by Bank OZK

This is not a commitment to make a loan but a summary of proposed terms for a loan to Borrower. All terms are subject to final approval of Bank OZK's loan committee and credit approval process. This Summary of Terms does not contain every condition that will be imposed by Bank OZK such as late charges, default rates, insurance requirements, and other protective covenants. The loan documents shall contain representations and warranties; affirmative and negative covenants and defaults customarily found in Bank OZK's credit agreements for similar financings and others appropriate in the judgment of Bank OZK for this transaction

It is anticipated that Bank OZK will be able to rely on third party reports ordered by the Bank Third party reports will be required to be reviewed.

Borrower agrees to reimburse Bank OZK for its third-party fees (none anticipated) and costs incurred in conjunction with the Loan, including, but not limited to, legal fees, regardless of whether the Loan closes. Any costs above and beyond the aforementioned estimated amount will be due from Borrower. If the total costs of such reports are less than the Legal Deposit and Reports Deposit and no other sums are due from Borrower to Bank OZK hereunder or in connection with the loan, then the remainder will be refunded to Borrower at the closing of the loan. Bank OZK shall not be liable or accountable in any way if, after Bank OZK's analysis of the appraisal, engineering report and other third-party reports, Bank OZK is unable to provide the loan terms set forth above or other loan terms acceptable to Borrower.

If the provisions hereof are acceptable to you, please confirm Summary of Terms. This Summary of the Letter of Intent expires 90 days from the date of issuance.

Sincerely,

By: 
Rick Eades, Senior Vice President

4.3 Developer Financial Capacity

The Legacy family of companies engages in the acquisition, development, construction, and sale of single-family homes and stacked flat condos. In addition, we are a for-hire commercial contractor for single family rental and multifamily housing. Over the past 4 years Legacy has undertaken an aggressive strategy to acquire well positioned land assets, raising capital and scaling the company.

We currently have 16 projects in varying stages of preconstruction through closeout. We forecast to start approximately 1,500 homes and condominiums in 2021 – 2023, having over 350 homes and condominiums sold and in backlog. Supporting this increasing business pipeline, Legacy has spent considerable time and resources building the organization including doubling the size of the workforce and upgrading all of its back-office technology.

Legacy receives project development fees of 4-6% of total costs, and a 6%-8% of construction costs builder fee, which we project will equate to approximately \$7 million+ per year in 2021 and thereafter. In addition to fees, Legacy earns profit participation of 17.5% - 25% on every project, paid out after closeout. We are forecasting to close out approximately 6 projects in 2022 and anticipate a realized profit of \$6.5 million, and 7 additional projects or \$10 million in 2023.

Legacy will fund the equity required on the for-sale product out of the profits and fees it generates from its pipeline of projects. We plan on acquiring a bank construction loan with Bank of the Ozarks, with whom we have partnered with on 2 previous construction projects. The equity requirement for the for-sale homes is estimated to be \$500,000 - \$700,000.

Legacy Impact Housing is a newly created division among the Legacy family of businesses for the sole purpose of producing affordable housing developments in which Legacy will have an ownership interest versus the previous Legacy roles in land development, construction, and sales. Financial statements for Legacy Impact Housing have not been prepared because the company was formed in June 2020. The financial strength of Legacy Impact Housing is derived from the combined performances of Legacy Multifamily Construction Services (MCS) and Legacy Development and Construction Services (DCS), the forebearers to Legacy Impact Housing and the entities that will share the Altitude East construction

financial guarantees with Impact Housing. The following 2019 and 2020 Legacy MCS and DCS financial statements and 2021 projected profit/loss statement are presented to demonstrate Legacy Impact Housing has sufficient financial resources to undertake the proposed Altitude East, Tannehill Lane development.