

# TREELINE

affordable luxury multifamily



Austin TX

## **SECTION 1 APPLICATION CHECKLIST / INFORMATION FORM**

# APPLICATION CHECKLIST/ INFORMATION FORM

|  |   |
|--|---|
| DEVELOPER NAME: JCI Apartments, LP   | BORROWER ENTITY NAME : Bridge at Treeline, LP |
| DEVELOPMENT NAME : Bridge at Treeline Apartments                                       | FUNDING CYCLE DEADLINE : Q2 2025              |
| 92-3230273   | DUNS NO:                                      |
| PROJECT ADDRESS: 12201 Heatherly Dr  | PROGRAM RHDA / OHDA: RHDA                     |
| CONTACT NAME : Sam Kumar   | AMOUNT REQUESTED:\$ \$8,250,000               |
| CONTACT ADDRESS AND PHONE : 1000 N Lamar Blvd, Ste. 400, Austin, Tx 78703 512-247-7000 |   |

| APPLICATION TABS |  |      |  | INITIALS |
|------------------|--|------|--|----------|
| A 1              | <a href="#">EXECUTIVE SUMMARY/PROJECT PROPOSAL</a> |      |  | SK       |
| A 2              | PROJECT SUMMARY FORM                               |      |  | SK       |
| A 3              | PROJECT TIMELINE                                   |      |  | SK       |
| A 4              | DEVELOPMENT BUDGET                                 |      |  | SK       |
| A 5              | OPERATING PRO FORMA                                |      |  | SK       |
| A 6              | SCORING SHEET                                      |      |  | SK       |
| ATTACHMENT TABS  |  |      |  | SK       |
| 1                | ENTITY INFORMATION                                 | 1.a. | <a href="#">Detailed listing of developer's experience</a> | SK       |
|                  |  | 1.b. | Certificate of Status                                      | SK       |
|                  |  | 1.c. | <a href="#">Statement of Confidence</a>                    | SK       |
| 2                | PRINCIPALS INFORMATION                             | 2.a. | Resumes of principals                                      | SK       |
|                  |  | 2.b. | Resumes of development team                                | SK       |
|                  |  | 2.c. | Resumes of property management team                        | SK       |
| 3                | FINANCIAL INFORMATION                              | 3.a. | Federal IRS Certification                                  | SK       |
|                  |  | 3.b. | <a href="#">Certified Financial Audit</a>                  | SK       |
|                  |  | 3.c. | Board Resolution   | SK       |
|                  |  | 3.d. | <a href="#">Financial Statements</a>                       | SK       |
|                  |  | 3.e. | <a href="#">Funding commitment letters</a>                 | SK       |
| 4                | PROJECT INFORMATION                                | 4.a. | <a href="#">Market Study</a>                               | SK       |
|                  |  | 4.b. | <a href="#">Good Neighbor Policy</a>                       | SK       |
|                  |  | 4.c. | <a href="#">SMART Housing Letter</a>                       | SK       |
|                  |  | 4.d. | <a href="#">MOU with ECHO</a>                              | SK       |
|                  |  | 4.e. | <a href="#">Resident Services</a>                          | SK       |
| 5                | PROPERTY INFORMATION                               | 5.a. | <a href="#">Appraisal</a>                                  | SK       |
|                  |  | 5.b. | <a href="#">Property Maps</a>                              | SK       |
|                  |  | 5.c. | Zoning Verification Letter                                 | SK       |
|                  |  | 5.d. | Proof of Site control                                      | SK       |
|                  |  | 5.e. | <a href="#">Phase I ESA</a>                                | SK       |

The applicant/developer certifies that the data included in this application and the exhibits attached hereto are true and correct. *Unsigned/undated submissions will not be considered.*

SIGNATURE OF APPLICANT



PRINTED NAME

Sam Kumar

TITLE OF APPLICANT

Manager

DATE OF SUBMISSION

10/21/2024

DATE AND TIME STAMP OF RECEIPT

FOR AHFC USE ONLY

## **SECTION 1.1 EXECUTIVE SUMMARY / PROJECT PROPOSAL**



## Bridge at Treeline

### EXECUTIVE SUMMARY

Bridge at Treeline, a planned 330-unit luxury apartment community is located at 12201 Heatherly Dr, a few minutes South of downtown Austin, TX. The developer plans 9 Class A three story buildings.

The site will include a clubhouse, an attractive and lush landscaped resort style pool area, private entrance gate system, and state of the art fitness center. Other site and project attributes include:

- 550 to 950 sf units with an average size of 807 sf
- 100% of units reserved as affordable housing
- 165 units set at 50% MFI, 165 units set at 60% MFI
- Easy access to: Hill Country, Retail, Employers, IH35 and SH45
- Class A finishes including stainless steel appliances, quartz counters, and smart thermostats.
- Daily shuttle service for residents to nearby public transit stops – multiple trips each morning and evening.

The total site is 11.33 acres of flat terrain surrounded by oak trees. Residents will be afforded easy access to major employers, grocery, and award-winning schools.

#### The Sponsor

Bridge at Treeline is sponsored by **JCI Apartments, LP**, an affiliate company of The Journeyman Group whose project team has the experience, organization, and development team in place which we deem necessary for the success of a development of this nature.

The principals of **JCI Apartments** have a proven track record with numerous completed apartment and condominium projects in Texas. **JCI Apartments** has teamed up with **Housing Authority of the City of Austin** to issue 4% LIHTC Bonds and be the GP of the underlying entity and ground lease the land to the Borrower.

JCI Apartments is submitting for Q2 2025 RHDA funding because we already own the site, have proper zoning, and have permits in hand. The project has been submitted for the 2025 bond lottery, and we believe that we can close in mid-late Q2 2025 as soon as an allocation is given in January 2025.

The project when completed will be leased and managed by JCI Management.

## SECTION 2 PROJECT SUMMARY FORM

## Project Summary Form

|  |   |  |
|--|---|--|
| 1) <b>Project Name</b><br>Bridge at Treeline Apartments            | 2) <b>Project Type</b><br>100% Affordable | 3) <b>New Construction or Rehabilitation</b><br>New Construction |
| 4) <b>Address(s) or Location Description</b><br>12201 Heatherly Dr |   | 5) <b>Mobility Bond Corridor</b><br>S. Pleasant Valley Rd        |
| 6) <b>Census Tract</b><br>24.28                                    | 7) <b>Council District</b><br>District 5  | 8) <b>Elementary School</b><br>BLAZIER EL                        |
| 9) <b>Affordability Period</b><br>99 Years                         |   |  |
| 10) <b>Type of Structure</b><br>Multi-family                       | 11) <b>Occupied?</b><br>No                | 12) <b>How will funds be used?</b><br>Construction               |

### 13) Summary of Rental Units by MFI Level

| Income Level       | Efficiency | One Bedroom | Two Bedroom | Three Bedroom | Four (+) Bedroom | Total      |
|--------------------|------------|-------------|-------------|---------------|------------------|------------|
| Up to 20% MFI      |            |             |             |               |                  | 0          |
| Up to 30% MFI      |            |             |             |               |                  | 0          |
| Up to 40% MFI      |            |             |             |               |                  | 0          |
| Up to 50% MFI      | 26         | 31          | 108         |               |                  | 165        |
| Up to 60% MFI      | 25         | 32          | 108         |               |                  | 165        |
| Up to 80% MFI      |            |             |             |               |                  | 0          |
| Up to 120% MFI     |            |             |             |               |                  | 0          |
| No Restrictions    |            |             |             |               |                  | 0          |
| <b>Total Units</b> | <b>51</b>  | <b>63</b>   | <b>216</b>  | <b>0</b>      | <b>0</b>         | <b>330</b> |

### 14) Summary of Units for Sale at MFI Level

| Income Level       | Efficiency | One      | Two      | Three    | Four (+) | Total    |
|--------------------|------------|----------|----------|----------|----------|----------|
| Up to 60% MFI      |            |          |          |          |          | 0        |
| Up to 80% MFI      |            |          |          |          |          | 0        |
| Up to 120% MFI     |            |          |          |          |          | 0        |
| No Restrictions    |            |          |          |          |          | 0        |
| <b>Total Units</b> | <b>0</b>   | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> | <b>0</b> |

### 15) Initiatives and Priorities (of the Affordable Units)

| Initiative                                | # of Units | Initiative              | # of Units |
|---|------------|-------------------------|------------|
| Accessible Units for Mobility Impairments | 6          | Continuum of Care Units | 0          |
| Accessible Units for Sensory Impairments  | 0          |                         |            |

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

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

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

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

19) The property has Healthy Food Access?

### 20) Estimated Sources and Uses of funds

| Sources   |                  |
|---|------------------|
| Debt  | 42,700,000       |
| Equity  | 19,603,370       |
| Grant   |                  |
| Other   |                  |
| Deferred Developer Fee<br>(not applicable for OHDA) | 1,242,804        |
| <b>Previous AHFC Funding</b>                        | -                |
| <b>Current AHFC Request</b>                         | <b>8,250,000</b> |

| Uses            |            |
|-----------------|------------|
| Acquisition     | 8,000,000  |
| Off-Site        | -          |
| Site Work       | -          |
| Sit Amenities   | -          |
| Building Costs  | 38,285,500 |
| Contractor Fees | 5,357,130  |
| Soft Costs      | 3,651,600  |
| Financing       | 8,611,944  |
| Developer Fees  | 7,890,000  |

**Total \$ 71,796,174**

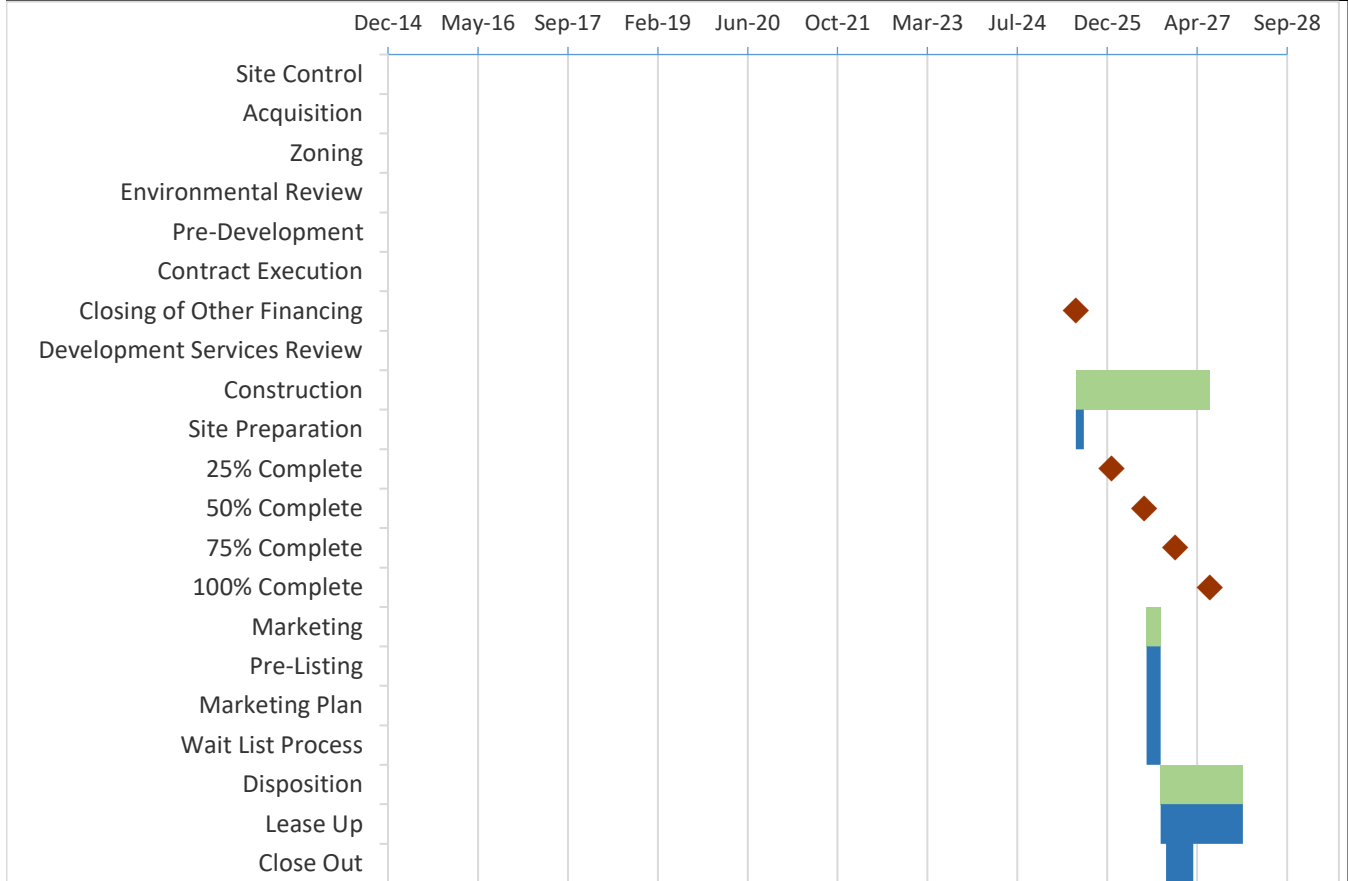
**Total \$ 71,796,174**

## SECTION 3 PROJECT TIMELINE



## Development Schedule

|                             | Start Date | End Date |
|-----------------------------|------------|----------|
| <b>Site Control</b>         | Jan-00     | Jan-00   |
| Acquisition                 | Complete   |          |
| Zoning                      | Complete   |          |
| Environmental Review        | Complete   |          |
| <b>Pre-Development</b>      | Jun-25     | Jan-00   |
| Contract Execution          | Complete   |          |
| Closing of Other Financing  | Jun-25     |          |
| Development Services Review | Complete   |          |
| <b>Construction</b>         | Jun-25     | Jun-27   |
| Site Preparation            | Jun-25     | Jul-25   |
| 25% Complete                | Dec-25     |          |
| 50% Complete                | Jun-26     |          |
| 75% Complete                | Dec-26     |          |
| 100% Complete               | Jun-27     |          |
| <b>Marketing</b>            | Jul-26     | Oct-26   |
| Pre-Listing                 | Jul-26     | Oct-26   |
| Marketing Plan              | Jul-26     | Oct-26   |
| Wait List Process           | Jul-26     | Oct-26   |
| <b>Disposition</b>          | Oct-26     | Dec-27   |
| Lease Up                    | Oct-26     | Dec-27   |
| Close Out                   | Nov-26     | Mar-27   |



## SECTION 4 DEVELOPMENT BUDGET

## Development Budget

|   | Total Project Cost | Requested AHFC Funds | Description  |
|---|--------------------|----------------------|--|
| <b>Pre-Development</b>                    |                    |                      |  |
| Appraisal                                 | 7,500              |                      |  |
| Environmental Review                      | 20,600             |                      |  |
| Engineering                               | 320,000            |                      |  |
| Survey                                    |                    |                      |  |
| Architectural                             | 585,000            |                      |  |
| <b>Subtotal Pre-Development Cost</b>      | \$933,100          | \$0                  |  |
| <b>Acquisition</b>                        |                    |                      |  |
| Site and/or Land                          | 8,000,000          |                      |  |
| Structures                                |                    |                      |  |
| Other (specify)                           |                    |                      |  |
| <b>Subtotal Acquisition Cost</b>          | \$8,000,000        | \$0                  |  |
| <b>Construction</b>                       |                    |                      |  |
| Infrastructure                            | 2,233,128          |                      |  |
| Site Work                                 | 1,488,752          |                      |  |
| Demolition                                | 0                  |                      |  |
| Concrete                                  | 3,721,880          | 485,294              |  |
| Masonry                                   | 2,605,316          | 485,294              |  |
| Rough Carpentry                           | 8,932,511          | 485,294              |  |
| Finish Carpentry                          | 1,860,940          | 485,294              |  |
| Waterproofing and Insulation              | 372,188            | 485,294              |  |
| Roofing and Sheet Metal                   | 1,116,564          | 485,294              |  |
| Plumbing/Hot Water                        | 2,233,128          | 485,294              |  |
| HVAC/Mechanical                           | 1,860,940          | 485,294              |  |
| Electrical                                | 1,860,940          | 485,294              |  |
| Doors/Windows/Glass                       | 372,188            | 485,294              |  |
| Lath and Plaster/Drywall and Acoustical   | 2,233,128          | 485,294              |  |
| Tiel Work                                 | 372,188            | 485,294              |  |
| Soft and Hard Floor                       | 372,188            | 485,294              |  |
| Paint/Decorating/Blinds/Shades            | 1,116,564          | 485,294              |  |
| Specialties/Special Equipment             | 1,555,456          | 485,294              | Fire Alarm, Fire Sprinkler, Low Voltage, Mirrors, Fencing  |
| Cabinetry/Appliances                      | 2,605,316          | 485,294              | Includes Countertops                                       |
| Carpet                                    | 372,188            | 485,294              |  |
| Other (specify)                           | 5,357,130          |                      | Contractor General Requirements, Overhead and Profit       |
| Construction Contingency                  | 1,000,000          |                      |  |
| <b>Subtotal Construction Cost</b>         | \$43,642,630       | \$8,250,000          |  |
| <b>Soft &amp; Carrying Costs</b>          |                    |                      |  |
| Legal                                     | 1,450,000          |                      |  |
| Audit/Accounting                          | 15,000             |                      |  |
| Title/Recordin                            |                    |                      |  |
| Architectural (Inspections)               | 277,750            |                      |  |
| Construction Interest                     | 4,582,898          |                      | Includes Loan Origination Fees, Performance Bonds, MIP     |
| Construction Period Insurance             | 150,000            |                      |  |
| Construction Period Taxes                 |                    |                      |  |
| Relocation                                |                    |                      |  |
| Marketing                                 | 150,000            |                      |  |
| Davis-Bacon Monitoring                    |                    |                      |  |
| Developer Fee                             | 7,890,000          |                      |  |
| Other (specify)                           | 4,704,796          |                      | Market Analysis, FF&E, Other Mortgageable. Costs, PCNA,    |
| <b>Subtotal Soft &amp; Carrying Costs</b> | \$19,220,444       | \$0                  | Permit Fees, Placement Fees, Admin Fee                     |
|   |                    |                      | Start up Costs, Operating Loss Allocation, Tax Credit Fees |
| <b>TOTAL PROJECT BUDGET</b>               | \$71,796,174       | \$8,250,000          |  |

## SECTION 5 OPERATING PRO FORMA



## 15 Year Rental Housing Operating Pro Forma (RHDA)

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

| INCOME                                   | YEAR 1      | YEAR 2      | YEAR 3      | YEAR 4      | YEAR 5      | YEAR 10     | YEAR 15      |
|--|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| POTENTIAL GROSS ANNUAL RENTAL INCOME     | \$5,380,956 | \$5,488,575 | \$5,598,347 | \$5,710,314 | \$5,824,520 | \$6,430,741 | \$7,100,057  |
| Secondary Income                         | \$79,200    | \$80,784    | \$82,400    | \$84,048    | \$85,729    | \$94,651    | \$104,503    |
| POTENTIAL GROSS ANNUAL INCOME            | \$5,460,156 | \$5,569,359 | \$5,680,746 | \$5,794,361 | \$5,910,248 | \$6,525,392 | \$7,204,560  |
| Provision for Vacancy & Collection Loss  | -\$409,512  | -\$417,702  | -\$426,056  | -\$434,577  | -\$443,269  | -\$489,405  | -\$540,342   |
| Rental Concessions                       | \$0         | \$0         | \$0         | \$0         | \$0         | \$0         | \$0          |
| EFFECTIVE GROSS ANNUAL INCOME            | \$5,050,644 | \$5,151,657 | \$5,254,690 | \$5,359,784 | \$5,466,979 | \$6,035,987 | \$6,664,217  |
| <b>EXPENSES</b>                          |             |             |             |             |             |             |              |
| General & Administrative Expenses        | \$235,000   | \$242,050   | \$249,312   | \$256,791   | \$264,495   | \$306,622   | \$355,459    |
| Management Fee                           | \$202,026   | \$206,067   | \$210,188   | \$214,392   | \$218,679   | \$241,440   | \$266,569    |
| Payroll, Payroll Tax & Employee Benefits | \$520,000   | \$535,600   | \$551,668   | \$568,218   | \$585,265   | \$678,482   | \$786,547    |
| Repairs & Maintenance                    | \$210,000   | \$216,300   | \$222,789   | \$229,473   | \$236,357   | \$274,002   | \$317,644    |
| Electric & Gas Utilities                 | \$150,000   | \$154,500   | \$159,135   | \$163,909   | \$168,826   | \$195,716   | \$226,888    |
| Water, Sewer & Trash Utilities           | \$180,000   | \$185,400   | \$190,962   | \$196,691   | \$202,592   | \$234,859   | \$272,266    |
| Annual Property Insurance Premiums       | \$225,000   | \$231,750   | \$238,703   | \$245,864   | \$253,239   | \$293,574   | \$340,333    |
| Property Tax                             | \$0         | \$0         | \$0         | \$0         | \$0         | \$0         | \$0          |
| Reserve for Replacements                 | \$82,500    | \$84,975    | \$87,524    | \$90,150    | \$92,854    | \$107,644   | \$124,789    |
| Other Expenses                           | \$103,200   | \$106,296   | \$109,485   | \$112,769   | \$116,153   | \$134,653   | \$156,099    |
| TOTAL ANNUAL EXPENSES                    | \$1,907,726 | \$1,962,938 | \$2,019,765 | \$2,078,256 | \$2,138,460 | \$2,466,991 | \$2,846,593  |
| NET OPERATING INCOME                     | \$3,142,918 | \$3,188,719 | \$3,234,925 | \$3,281,528 | \$3,328,520 | \$3,568,996 | \$3,817,624  |
| <b>DEBT SERVICE</b>                      |             |             |             |             |             |             |              |
| First Deed of Trust Annual Loan Payment  | \$2,557,861 | \$2,557,861 | \$2,557,861 | \$2,557,861 | \$2,557,861 | \$2,557,861 | \$2,557,861  |
| Second Deed of Trust Annual Loan Payment | \$0         | \$0         | \$0         | \$0         | \$0         | \$0         | \$0          |
| Third Deed of Trust Annual Loan Payment  | \$0         | \$0         | \$0         | \$0         | \$0         | \$0         | \$0          |
| Other Annual Required Payment            | \$0         | \$0         | \$0         | \$0         | \$0         | \$0         | \$0          |
| Other Annual Required Payment            | \$0         | \$0         | \$0         | \$0         | \$0         | \$0         | \$0          |
| <b>ANNUAL NET CASH FLOW</b>              | \$585,057   | \$630,858   | \$677,064   | \$723,667   | \$770,659   | \$1,011,135 | \$1,259,763  |
| <b>CUMULATIVE NET CASH FLOW</b>          | \$585,057   | \$1,215,915 | \$1,892,979 | \$2,616,646 | \$3,387,305 | \$7,841,788 | \$13,519,033 |
| <b>Debt Coverage Ratio</b>               | 1.23        | 1.25        | 1.26        | 1.28        | 1.30        | 1.40        | 1.49         |

## SECTION 5.5 UNIT SQUARE FOOTAGE

| Bedroom Type | Income Level | Unit Square Footage | # of Units | Total Sq Footage |
|--------------|--------------|---------------------|------------|------------------|
| Efficiency   | 50% MFI      | 550                 | 26         | 14,300           |
| Efficiency   | 60% MFI      | 550                 | 25         | 13,750           |
| 1-bdrm       | 50% MFI      | 625                 | 31         | 19,375           |
| 1-bdrm       | 60% MFI      | 625                 | 32         | 20,000           |
| 2-bdrm       | 50% MFI      | 900                 | 63         | 56,700           |
| 2-bdrm       | 50% MFI      | 950                 | 45         | 42,750           |
| 2-bdrm       | 60% MFI      | 900                 | 63         | 56,700           |
| 2-bdrm       | 60% MFI      | 950                 | 45         | 42,750           |
|              |              |                     |            |                  |
|              |              |                     |            |                  |
|              |              |                     |            |                  |
|              |              |                     |            |                  |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
|              |              |                     |            | -                |
| Total        |              |                     | 330        | 266,325          |

| Average Square Foot AHFC Units at or Below 50% MFI |        |        |        |        |
|--|--------|--------|--------|--------|
| Efficiency   | 1-bdrm | 2-bdrm | 3-bdrm | 4-bdrm |
| 550  | 625    | 921    | -      | -      |

## SECTION 6 SCORING SHEET



|  |                             |  |
|--|-----------------------------|--|
| <b>Project Name</b>                              | Edge at Treeline Apartments |  |
| <b>Project Type</b>                              | 100% Affordable             |  |
| <b>Council District</b>                          | District 5                  |  |
| <b>Census Tract</b>                              | 24.28                       |  |
| <b>Prior AHFC Funding</b>                        | \$0                         |  |
| <b>Current AHFC Funding Request Amount</b>       | \$8,250,000                 |  |
| <b>Estimated Total Project Cost</b>              | \$71,796,174                |  |
| <b>High Opportunity</b>                          | No                          |  |
| <b>High Displacement Risk</b>                    | NO                          |  |
| <b>High Frequency Transit</b>                    | No                          |  |
| <b>Imagine Austin</b>                            | Yes                         |  |
| <b>Mobility Bond Corridor</b>                    | S. Pleasant Valley Rd       |  |
| <b>SCORING ELEMENTS</b>                          |                             | Description  |
| <b>UNITS</b>                                     |                             |  |
| < 20% MFI  | 0                           | # of rental units at < 20% MFI   |
| < 30% MFI  | 0                           | # of rental units at < 30% MFI   |
| District Goal                                    | 7%                          | % of City's affordable housing goal  |
| High Opportunity                                 | FALSE                       | % of City's affordable housing goal for high opportunity areas                         |
| Displacement Risk                                | 0%                          | % of City's affordable housing goal to reduce displacement                             |
| High Frequency Transit                           | 0%                          | % of City's affordable housing goal near high frequency transit                        |
| Imagine Austin                                   | 9%                          | % of City's affordable housing goal in imagine austin corridors                        |
| Geographic Dispersion                            | 10%                         | % of City's affordable housing goal to increase geographic dispersion                  |
| Mobility Bond Corridor                           | 8%                          | % of City's affordable housing goal within mobility bond corridors                     |
| <b>SCORE</b>                                     | <b>0</b>                    | <b>% of annual goal * units * 50%, max of 75</b>                                       |
| < 40% MFI  | 0                           | # of rental units at < 40% MFI   |
| < 50% MFI  | 165                         | # of rental units at < 50% MFI   |
| District Goal                                    | 7%                          | % of City's affordable housing goal  |
| High Opportunity                                 | FALSE                       | % of City's affordable housing goal for high opportunity areas                         |
| Displacement Risk                                | 0%                          | % of City's affordable housing goal to reduce displacement                             |
| High Frequency Transit                           | 0%                          | % of City's affordable housing goal near high frequency transit                        |
| Imagine Austin                                   | 9%                          | % of City's affordable housing goal in imagine austin corridors                        |
| Geographic Dispersion                            | 10%                         | % of City's affordable housing goal to increase geographic dispersion                  |
| Mobility Bond Corridor                           | 8%                          | % of City's affordable housing goal within mobility bond corridors                     |
| <b>SCORE</b>                                     | <b>14</b>                   | <b>% of annual goal * units * 25%, max of 75</b>                                       |
| < 60% MFI  | 0                           | # of units for purchase at < 60% MFI   |
| District Goal                                    | 7%                          | % of City's affordable housing goal  |
| High Opportunity                                 | FALSE                       | % of City's affordable housing goal for high opportunity areas                         |
| Displacement Risk                                | 0%                          | % of City's affordable housing goal to reduce displacement                             |
| High Frequency Transit                           | 0%                          | % of City's affordable housing goal near high frequency transit                        |
| Imagine Austin                                   | 9%                          | % of City's affordable housing goal in imagine austin corridors                        |
| Geographic Dispersion                            | 10%                         | % of City's affordable housing goal to increase geographic dispersion                  |
| Mobility Bond Corridor                           | 8%                          | % of City's affordable housing goal within mobility bond corridors                     |
| <b>SCORE</b>                                     | <b>0</b>                    | <b>% of annual goal * units * 50%, max of 75</b>                                       |
| < 80% MFI  | 0                           | # of units for purchase at < 80% MFI   |
| District Goal                                    | 7%                          | % of City's affordable housing goal  |
| High Opportunity                                 | FALSE                       | % of City's affordable housing goal for high opportunity areas                         |
| Displacement Risk                                | 0%                          | % of City's affordable housing goal to reduce displacement                             |
| High Frequency Transit                           | 0%                          | % of City's affordable housing goal near high frequency transit                        |
| Imagine Austin                                   | 9%                          | % of City's affordable housing goal in imagine austin corridors                        |
| Geographic Dispersion                            | 10%                         | % of City's affordable housing goal to increase geographic dispersion                  |
| Mobility Bond Corridor                           | 8%                          | % of City's affordable housing goal within mobility bond corridors                     |
| <b>SCORE</b>                                     | <b>0</b>                    | <b>% of annual goal * units * 25%, max of 75</b>                                       |
| <b>Unit Score</b>                                | <b>14</b>                   | <b>MAXIMUM SCORE = 300</b>   |
| <b>INITIATIVES AND PRIORITIES</b>                |                             |  |
| Continuum of Care                                | 0                           | Total # of units provided up to 100 per year   |
| <b>Continuum of Care Score</b>                   | <b>0</b>                    | <b>(total CoC Units/100 + HF Units/50)*20</b>  |
| <b>Access to Healthy Food</b>                    | <b>No</b>                   | <b>Within 1 Mile of Healthy Food (City GIS)</b>  |
| <b>Continuum of Care Weighted Score</b>          | <b>0</b>                    | <b>Mobility, Access to Jobs, Community Institutions, Social Cohesion</b>               |
| 2 Bedroom Units                                  | 108                         | Total Affordable 2 Bedroom units   |
| 3 Bedroom Units                                  | 0                           | Total Affordable 3 Bedroom units   |
| 4 Bedroom Units                                  | 0                           | Total Affordable 4+ Bedroom units  |
| <b>Multi-Generational Housing Score</b>          | <b>13</b>                   | <b>Multi-bedroom Unit/Total Units * 20</b>   |
| <b>TEA Grade</b>                                 | <b>86</b>                   | <b>Elementary School Rating from TEA</b>   |
| <b>Multi-Generational Housing Weighted Score</b> | <b>8</b>                    | <b>Educational Attainment, Environment, Community Institutions, Social Cohesion, E</b> |
| Accessible Units                                 | 6                           | mobility and sensory units   |
| Non-PSH, Non-Voucher Under 20% MFI               | 0                           | Total units under 20% MFI  |
| <b>Accessibility Score</b>                       | <b>1</b>                    | <b>Accessible Unit/Total Units * 20</b>  |
| <b>Metro Access Service</b>                      | <b>Yes</b>                  | <b>Within 3/4 mile of fixed route transit</b>  |
| <b>Accessibility Weighted Score</b>              | <b>0</b>                    | <b>Housing Stability, Health, Mobility, Community Institutions</b>                     |
| <b>Initiatives and Priorities Score</b>          | <b>22</b>                   | <b>MAXIMUM SCORE = 200</b>   |
| <b>UNDERWRITING</b>                              |                             |  |
| AHFC Leverage                                    | 23%                         | % of total project cost funded through AHFC request                                    |
| <b>Leverage Score</b>                            | <b>18</b>                   | <b>3 points per 5% reduction in leverage below 50% (max 30)</b>                        |
| AHFC Per Unit Subsidy (including prior amounts)  | \$50,000                    | Amount of assistance per unit  |
| <b>Subsidy per unit score</b>                    | <b>19</b>                   | <b>(\$200,000 - per unit subsidy)*25/\$200,000</b>                                     |
| AHFC Per Bedroom Subsidy                         | \$30,220                    | Amount of assistance per bedroom   |
| <b>Subsidy per Bedroom Score</b>                 | <b>21</b>                   | <b>(\$200,000 - per bedroom subsidy)*25/\$200,000</b>                                  |
| Debt Coverage Ratio (Year 5)                     | 1.30                        | Measured at the 5 Year mark  |
| <b>Debt Coverage Ratio Score</b>                 | <b>19.87097119</b>          | <b>Minimum = 1.0; Maximum = 1.5; 1.25 = best score</b>                                 |
| <b>Underwriting Score</b>                        | <b>78</b>                   | <b>MAXIMUM SCORE = 100</b>   |
| <b>APPLICANT</b>                                 |                             |  |
| <b>FINAL QUANTITATIVE SCORE</b>                  | <b>114</b>                  | <b>THRESHOLD SCORE = 50</b>  |
| Previous Developments                            |                             |  |
| Compliance Score                                 |                             |  |
| Proposal   |                             |  |
| Supportive Services                              |                             |  |
| Development Team                                 |                             |  |
| Management Team                                  |                             |  |
| Notes  |                             |  |

## ATTACHMENT 1 ENTITY INFORMATION

### 1a. Detailed Listing of Developer's Experience



Journeyman Group is a family of companies dedicated to the development, finance, design, construction, and management of diverse properties. Our vast experience includes affordable multi-family properties, premium market-rate apartments, senior living communities, office spaces, and hotels.

Our affiliated companies include JCI Apartments, LP, JCI Residential, LLC, JCI Management, LLC, and Journeyman Construction, LLC. Our group of companies are vertically integrated to uphold accountability across all project phases - Development, Construction, and Management. With an entrepreneurial spirit and a commitment to collaboration, we consistently deliver groundbreaking solutions and set industry benchmarks across Austin and its neighboring metropolitan area.

Journeyman Group, alongside its affiliated general contractor, Journeyman Construction, Inc, boasts an impressive track record of successfully delivering over 200 projects, surpassing a combined expenditure exceeding \$2 billion. Central to our achievement is our commitment to ensuring a guaranteed construction price and schedule, achieved through meticulous management of the design process and in-house construction services, thus effectively mitigating risk for our shareholders. Our team members are dedicated to achieving project completion with the utmost integrity and uncompromising quality standards.

Combining deep-rooted local insights with specialized expertise, Journeyman Group crafts environments and experiences that redefine the essence of community. Our team is deeply committed to the well-being of the residents, occupants, and guests within our communities and strives to enhance their lives by providing environments that are both comfortable and enriched. Our communities offer supportive services to the residents such as financial literacy courses, an annual health fair, tax prep courses, onsite notary services, and weekly activities for children. Additionally, our properties consistently deliver exceptional value and returns for our valued shareholders.



| Rank | Business name (Prior rank)<br>Website                                | Austin area:<br>No. of<br>multifamily<br>units under<br>development or<br>delivered | Nonlocal:<br>No. of<br>multifamily<br>units under<br>development or<br>delivered | No. of planned<br>units in the<br>Austin area | Representative multifamily properties  | Top local development executive                 |
|------|--|---|--|---|--|---|
| 1    | <b>Journeyman Group</b> ①<br>journeymangroup.com                     | 3,944   | 0  | 1,613   | Water Oak Apartments (292 units, South); Bluebonnet Preserve Apts. (330 units, NE); High Point Preserve (454 units, Central); all delivered                              | Kurt Goll, president, JCI Residential           |
| 2    | <b>Alliance Residential</b> ②<br>allresco.com                        | 3,089   | n/a  | 381   | Broadstone: North Ridge (339 units); Frontera Ridge (376 units, North); East End (307 units); North ATX (369 units, N. Central); North Lamar (305 units)                 | Jeff Diltz, managing director                   |
| 3    | <b>The NRP Group</b> ③<br>nrpgroup.com                               | 2,442   | n/a  | 667   | Bridge at Estancia (318 units, delivered); under construction: Airport Crossing (256 units); Alameda at Oak Hill (334 units); Centro35 (330 units)                       | Jason Arechiga, SVP<br>Christopher O'Neill, EVP |
| 4    | <b>Wilson Capital</b> ⑤<br>wilson-capital.com                        | 2,135   | 0  | 906   | Delivered: Jovie Pflugerville (182 units, NE); Brio (336 units, NE); Sommersy (300 units, NE); Jovie Belterra (150 units, West, under construction)                      | Taylor Wilson, president                        |
| 5    | <b>Endeavor</b> ④<br>endeavor-re.com                                 | 2,119   | 1,071  | 2,188   | Citizen House MLK (288 units, East, delivered); Citizen House Blue Bluff (354 units, East, under construction); Solomon (369 units, East Central, under construction)    | Jason Thumlert, managing principal              |
| 6    | <b>Trammell Crow Co.</b> ⑧<br>trammellcrow.com/austin                | 1,433   | n/a  | 1,930   | Alder at the Grove (268 units, Central, delivered); under construction: The Blockyard (344 units, East); 700 River (377 units, CBD); The Merle on Howard (444 units, NE) | Brad Maples, managing director                  |
| 7    | <b>Presidium</b> ⑬<br>presidiumre.com                                | 1,322   | n/a  | 2,769   | Presidium: 183 (374 units); River Park (427 units); Tech Ridge (358 units); Velocity Crossing: (307 units); Waterford Phase I (283 units); all under construction        | Cross Mocer, CEO, Austin<br>John Griggs, Co-CEO |
| 8    | <b>Roers Companies</b> ⑥<br>roerscompanies.com                       | 895   | 782  | 392   | The Narrows (300 units, Hutto, delivered); Ryder Ridge (224 units, Austin, under construction); Wixby House (371 units, McKinney Falls, under construction)              | Shane LaFave, EVP                               |
| 9    | <b>Stonelake Capital Partners</b> ⑦<br>stonelake.com                 | 847   | 490  | 1,419   | 415 Colorado (328 units, CBD); Trailhead East (221 units, East); The Met (297 units, The Domain); all under construction   | Travis Eickenhorst,<br>Will Jenkins, partners   |
| 10   | <b>LV Collective</b> ①<br>lvcollective.com                           | 772   | 2,346  | 1,035   | Rambler (West Campus, 215 units, delivered); Paseo (Rainey Street, 557 units, under construction)  | David Kanne, president                          |
| 11   | <b>Sabot Development LTD</b> ⑪<br>sabotdevelopment.com               | 741   | n/a  | n/a   | The Goodwin (363 units, East, under construction); Tisdale at Lakeline Station (378 units, under construction)   | Jim Young, president                            |
| 12   | <b>Kairoi Residential</b> ⑫<br>kairoi.com                            | 701   | 0  | 3,313   | Sixth and Guadalupe (349 units, CBD, under construction); Waterline (352 units, CBD, under construction)   | Tony Curp, SVP development                      |
| 13   | <b>Mill Creek Residential Trust</b> ④<br>millcreekplaces.com         | 695   | n/a  | 220   | Modera EaDo (377 units, Domain area, Q1 2024 delivery); Modera Georgetown (318 units, Georgetown, Q1 2024 delivery)  | Matt Bunch, managing director,<br>development   |
| 14   | <b>Pearlstone Partners LLC</b> ⑩<br>pearlstonepartners.com           | 676   | n/a  | 698   | Parkside in Mueller (209 units, deliver spring 2024); Vesper (284 units, Rainey Street, deliver spring 2024); Montage South Lamar (182 units, deliver Q2 2025)           | Bill Knauss, president/principal                |
| 15   | <b>United Properties</b> ⑭<br>uproperties.com                        | 576   | 423  | 1,773   | Bishop Momo (274 units, S. Congress, under construction); Shelby Ranch (302 units, S. Austin, under construction)  | Victor Young, SVP, commercial development       |
| 16   | <b>Intracorp Texas</b> ⑧<br>intracorphomes.com                       | 564   | n/a  | 280   | 44 East Avenue; One Oak; Congress Lofts at St. Elmo  | Brad Stein, president                           |
| 17   | <b>Transwestern Development Co.</b> ⑨<br>transwesterndevelopment.com | 546   | n/a  | 294   | The Shoal (140 units, CBD, delivered); Windsor Commons (406 units, NE, under construction)   | Ty Puckett, regional partner                    |
| 18   | <b>Stratus Properties Inc.</b> ⑤<br>stratusproperties.com            | 498   | n/a  | 3,902   | The Saint June (82 units, SW, delivered); The Saint George (316 units, N. Burnet, under construction)  | William Armstrong, CEO/president                |
| 19   | <b>Brandywine Realty Trust</b> ⑥<br>brandywinerealty.com             | 341   | n/a  | 0   | Solaris House at Uptown ATX (341 units; NW, under construction)  | Leon Shadowen, VP of development                |
| 20   | <b>CSW Development LLC</b> ⑮<br>cswdevelopment.com                   | 338   | 0  | 910   | Lirica (338 units, East Central, 4Q 2025 delivery)   | Todd Wallace, CEO                               |
| 21   | <b>Galesi Group</b> ⑩<br>galesi.com                                  | 300   | n/a  | 0   | Hillside on Parmar Lane (300 units, Harris Branch, under construction)   | Ryan Buicko, VP                                 |
| 22   | <b>W2 Real Estate Partners</b> ⑮<br>W2REP.com                        | 264   | 0  | 264   | Avelyn San Marcos (264 units)  | Steve Freche, managing partner                  |
| 23   | <b>Industry ATX</b> ⑮<br>industryatx.com                             | 23  | n/a  | 500   | Industry SOMA (23 units, S. Austin, under construction)  | Megan Etz,<br>Michael Winningham, principals    |
| 24   | <b>LT Development</b> ⑥<br>ltcommercialgroup.com                     | 15  | 0  | 0   | Kramer Heights Condominiums (6 units delivered, 9 units under construction)  | Tram Le, owner                                  |

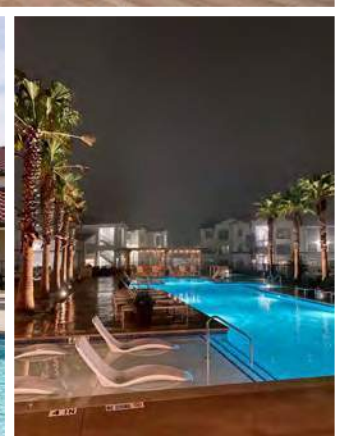
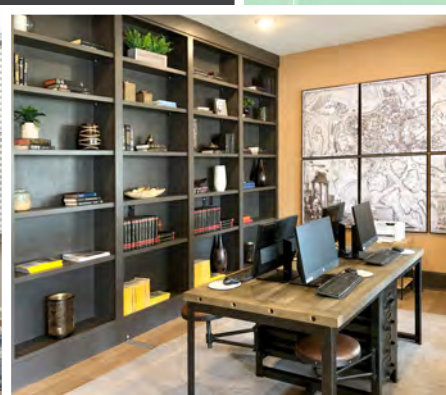
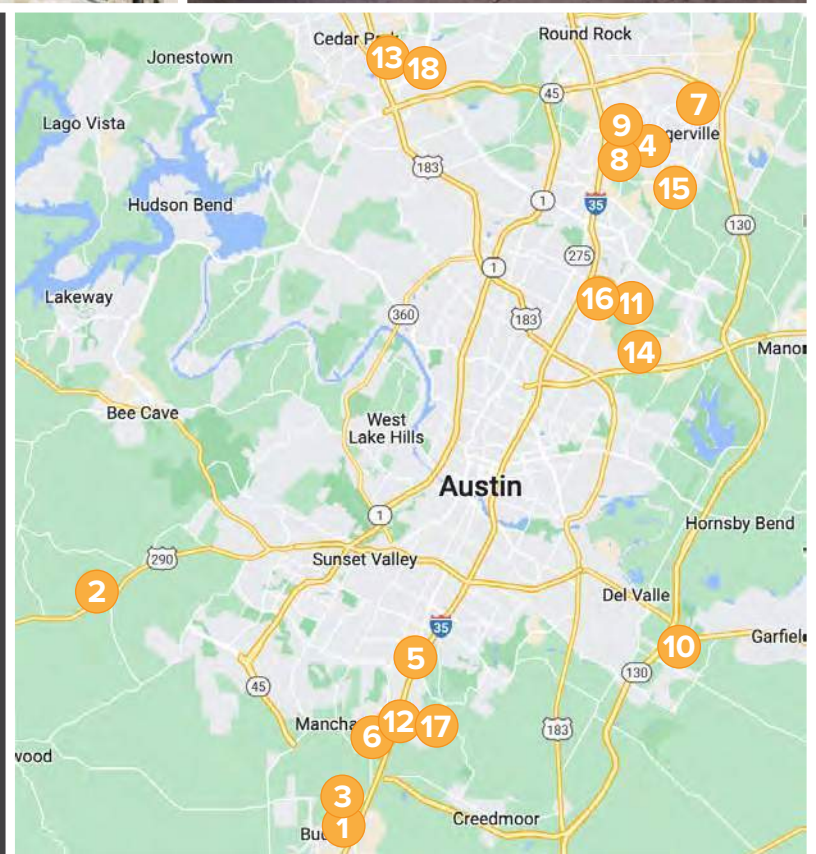
<sup>1</sup> LV Collective fka Lincoln Ventures

<sup>2</sup> Kairoi Residential and Lincoln Property co-own 6th and Guadalupe tower. Lincoln Property is handling the commercial component with 589,112 s.f.





| #  | PROJECT NAME        | UNITS | FINISHED |
|----|---------------------|-------|----------|
| 1  | Silverado Crossing  | 300   | 2013     |
| 2  | Belterra Springs    | 152   | 2015     |
| 3  | Carrington Oaks     | 303   | 2015     |
| 4  | The Highlands       | 292   | 2017     |
| 5  | Southpark Crossing  | 308   | 2017     |
| 6  | Estancia Villas     | 312   | 2018     |
| 7  | Stone Hill          | 300   | 2019     |
| 8  | Santa Clara         | 300   | 2020     |
| 9  | Palo Alto           | 300   | 2020     |
| 10 | Eastridge           | 300   | 2020     |
| 11 | Pioneer Hill        | 300   | 2021     |
| 12 | Water Oak           | 292   | 2022     |
| 13 | Avery Oaks          | 294   | 2022     |
| 14 | High Point Preserve | 454   | 2022     |
| 15 | Bluebonnet Preserve | 330   | 2023     |
| 16 | Paloma              | 300   | 2023     |
| 17 | Three Hills         | 280   | 2023     |
| 18 | Avery Ranch         | 288   | 2023     |



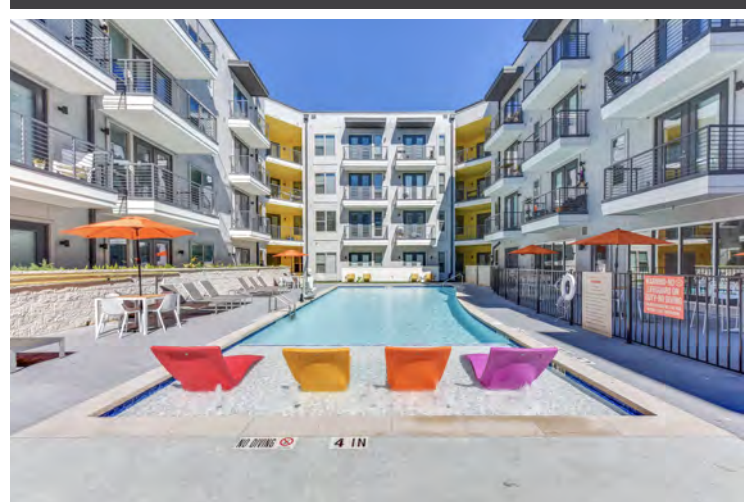
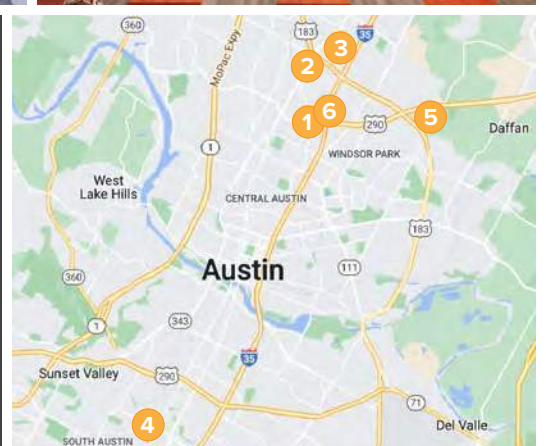




# URBAN INFILL



| # | PROJECT NAME           | UNITS | FINISHED |
|---|------------------------|-------|----------|
| 1 | FLORA                  | 194   | 2019     |
| 2 | St Johns West          | 297   | 2020     |
| 3 | Bridge at Granada      | 258   | 2021     |
| 4 | Bridge at Turtle Creek | 307   | 2023     |
| 5 | Delco Flats            | 186   | 2023     |
| 6 | Windsor Park Towers    | 308   | 2023     |





**Journeyman Group and its Affiliated Companies**  
**Units Developed and Constructed**



| Property                                     | Units | Year Completed     | Development                       |
|--|-------|--------------------|-----------------------------------|
| Silverado Crossing                           | 300   | 2013               | Market Rate                       |
| Seville Apartments                           | 27    | 2014               | Market Rate                       |
| Beltera Springs Apartments                   | 152   | 2015               | Market Rate                       |
| Carrington Oaks Apartments                   | 303   | 2015               | Market Rate                       |
| Legacy Oaks Assisted Living & Memory Care    | 82    | 2015               | N/A                               |
| The Highlands Apartments                     | 292   | 2017               | Market Rate                       |
| Silverado 48 Apartments                      | 48    | 2017               | Market Rate                       |
| Southpark Crossing Apartments                | 308   | 2017               | Market Rate                       |
| Estancia Villas Apartments                   | 312   | 2018               | Market Rate                       |
| Techridge Oaks Assisted Living & Memory Care | 86    | 2018               | N/A                               |
| Double Creek Assisted Living & Memory Care   | 86    | 2018               | N/A                               |
| Double Creek Independent Living              | 28    | 2018               | N/A                               |
| Stone Hil Apartments                         | 300   | 2019               | Market Rate                       |
| FLORA Apartments                             | 194   | 2019               | Market Rate                       |
| The Philomena Assisted Living & Memory Care  | 86    | 2019               | N/A                               |
| St John's West Apartments                    | 297   | 2020               | Market Rate                       |
| Santa Clara Apartments                       | 300   | 2020               | Market Rate                       |
| Buda Oaks AL & MC                            | 86    | 2020               | N/A                               |
| Palo Alto Apartments                         | 300   | 2020               | Market Rate                       |
| Soco Assisted Living & Memory Care           | 85    | 2020               | N/A                               |
| Eastridge Apartments                         | 300   | 2020               | HUD / Market Rate                 |
| Bridge at Granada Apartments                 | 258   | 2021               | HUD / Affordable w/4% Tax Credits |
| Pioneer Hill Apartments                      | 300   | 2021               | Market Rate                       |
| Water Oak Apartments                         | 292   | 2023               | Market Rate                       |
| Avery Oaks Apartments                        | 294   | 2022               | Market Rate                       |
| Bridge at Turtle Creek Apartments            | 307   | 2023               | Affordable w/4% Tax Credits       |
| High Point Preserve Apartments               | 454   | 2023               | Affordable Housing                |
| Bluebonnet Preserve                          | 330   | 2023               | Market Rate                       |
| Bridge at Paloma                             | 300   | 2023               | Affordable Housing                |
| Bridge at Delco Flats                        | 186   | 2023               | Affordable Housing                |
| Bridge at Windsor Park Tower                 | 308   | 2024               | Affordable Housing                |
| Bridge at Three Hills Apartments             | 280   | 2024               | Affordable Housing                |
| Bridge at Avery Ranch Apartments             | 288   | 2024               | Affordable Housing                |
| Park South Apartments                        | 280   | Under Construction | Workforce Housing                 |
| The Matador                                  | 285   | Under Construction | Workforce Housing                 |
| Park at Speyside                             | 309   | Under Construction | Market Rate                       |
| Cantarra Apartments                          | 325   | Under Construction | Workforce Housing                 |
| Augustine Apartments                         | 343   | Under Construction | Workforce Housing                 |
| Kyle Springs Apartments                      | 302   | Under Construction | HUD / Market rate                 |
| Total Units Developed                        | 9413  |                    |                                   |
| <b>COMING SOON</b>                           |       |                    |                                   |
| Bridge at Saffron                            | 337   | 2024               | Workforce Housing                 |
|  |       |                    |                                   |
|  |       |                    |                                   |
| Total Including Upcoming Units               | 9750  | 2024               |                                   |

## ATTACHMENT 1 ENTITY INFORMATION

### 1b. Certificate of Status

## ATTACHMENT 1 ENTITY INFORMATION

### 1c. Statement of Confidence

## Statement of Confidence

The Journeyman Group and our consultant team are pleased to have submitted our qualifications for RHDA Funding for affordable housing.

The Journeyman Group's vertically integrated approach to real estate development makes designing, permitting, financing, constructing, and operating projects seamless. With built-in development, property management, and construction arms, the Journeyman Group can perform all stages of the project from concept to operation.

Aside from our numerous capabilities, the Journeyman Group also has 14 years of specific multifamily experience in the greater Austin area upon which to draw. The Journeyman Group has developed over 7,569 units across the Austin MSA and has another 1,844 under development for a total of 9,413 units under Journeyman's belt. The Journeyman Group is currently managing and operating 2,990 units. Of those 2,990 units, 565 are Low Income Housing Tax Credit projects and 1,816 are workforce housing projects with rent limits in place. These affordable multifamily properties are partnerships with HFC entities such as Travis County Housing Finance Corporation and Housing Authority of the City of Austin.

Our mission is to provide people living in our community access to high-quality affordable housing. We are excited to fulfill our vision of a vibrant community that welcomes South Austin's workforce.

For this project, we are proposing 330 residential apartments which will all be reserved as affordable housing. 165 units will be at 50% MFI, 165 units will be at 60% MFI.

If you have any questions, please do not hesitate to reach out. We look forward to continuing the conversation. **This submission is compliant with the application requirements.**

Thank you for your consideration,



**Kurt Goll**  
President Multifamily

**JOURNEYMAN** GROUP

**Statement of Confidence**

## ATTACHMENT 2 PRINCIPALS INFORMATION

### 2a. Resumes of Principals

# Principals



## **Sam Kumar** - President, CEO, Journeyman Group

Sam Kumar is the CEO and founder of the Journeyman Group which includes Journeyman Construction and JCI Residential. Establishing Journeyman Construction in 1996 and JCI Residential in 2011, with a background in commercial project management, Mr Kumar has successfully led his company with simple standards of integrity and compassion. Under his leadership and guidance the Journeyman Group has built and or developed well over \$1billion in projects and is currently recognized as a leader in the multifamily and construction industry in Austin. Journeyman provides housing of all income levels ranging from market rate garden apartments to affordable urban infill. The Austin Business Journal has recently recognized Journeyman as the # 1 Multifamily Developer in Central Texas. Mr Kumar is a distinguished alumni of The University of Texas.



## **Kurt Goll** - President, Multifamily

Kurt Goll brings over 34 years of multifamily experience to the Journeyman Group as President of the Multifamily division. As a former Architect, Mr Goll helped establish the Multifamily development division of the Journeyman Group and adds a unique ability to blend design and construction knowledge into a development project while relying on years of experience delivering built projects to the marketplace. The Journeyman Group develops and manages multifamily properties in Austin, Texas and surrounding communities. Under Mr . Golls guidance The Journeyman Group has developed and managed a variety of successful multifamily project types including HUD 221-D4, Workforce, Affordable, and Class A garden and Midrise properties. Mr Goll graduated in 1990 with a 5 year degree in Architecture from Texas Tech University and currently resides in Austin , Texas.



## **David Gregorcyk** - Vice President & General Counsel

David Gregorcyk leads all legal functions at the Journeyman Group including real estate development, financing transactions, acquisitions, dispositions, insurance, and risk management. He has closed over a billion dollars of transactions and also oversees all legal matters for the group's general contracting firm, Journeyman Construction, LLC. Prior to joining the Journeyman team, David was an attorney with a top-rated construction law firm, representing some of the largest commercial building contractors in Texas. He graduated with special honors from the University of Texas at Austin and received his law degree from St. Mary's University in San Antonio. David is Board Certified in Construction Law by the Texas Board of Legal Specialization and has been a member of the Board's advisory commission since its inception. He is also a member of the governing council of the Construction Law Section of the State Bar of Texas and the Texas Construction Law Foundation.



## **ATTACHMENT 2 PRINCIPALS INFORMATION**

### **2b. Resumes of Development Team**

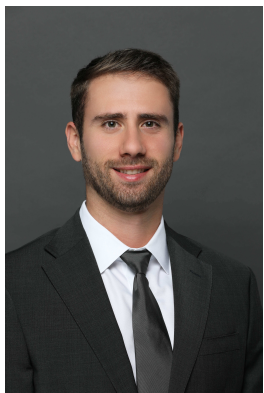
# Development Team

| Development Team for Bridge at Treeline Apartments |   |
|--|---|
| Developer  | JCI Apartments, LP<br>Kurt Goll<br>1000 N. Lamar Blvd, Ste. 400,<br>Austin, Texas 78703<br>512-431-9187<br>Kgoll@journeymangroup.com          |
| Architect  | Cross Architects, PLLC<br>Brian Rumsey, LEED AP, AIA<br>879 Junction Dr,<br>Allen, TX 75013<br>469-393-1125<br>BRumsey@crossarchitects.com    |
| Civil Engineer                                     | Quiddity Engineering, LLC<br>Ryan Lamarre, PE<br>3100 Alvin Devane Blvd, Ste 150,<br>Austin, TX 78741<br>512-685-5137                         |
| Landscape Architect                                | Blu Fish Collaborative, Inc.<br>Mike Fishbaugh, PLA, ASLA, LEED AP, CLARB<br>107 Leland Steet, Ste. 2,<br>Austin, TX 78704                    |
| General Contractor                                 | Journeyman Construction<br>Cannon Kilde<br>1000 N. Lamar Blvd, Ste. 400,<br>Austin, Texas 78703<br>512-247-7000<br>CKilde@journeymangroup.com |



**Garrett Gill**  
Development Manager

Garrett attended the University of Texas, where he received a degree in Real Estate Finance. He has been with the Journeyman Group since 2020, and has helped propel projects forward as a Development Manager. Garrett has successfully guided multiple projects through design, development and eventual sale. Recently Garrett has been involved in converting two 300 unit multifamily properties from market rate to affordable workforce housing partnerships .



**Nick LaDuca**  
Development Manager

Nick represents Journeyman throughout the development cycle from project identification to disposition. He joined Journeyman in 2018 and has a M.B.A. in Real Estate Finance from UTSA



**Cole Wuestenberg**  
Development Manager

Cole has been with Journeyman since 2022. He graduated from University of Texas with a degree in Accounting & Finance before studying Real Estate Finance during his MBA at UT Dallas. Cole has successfully represented Journeyman on a variety of projects during his tenure.



**Ben Hines**  
Development Manager

Benjamin attended the University of Texas, and graduated with degrees in Film and Business. He started at Journeyman in 2020 and has overseen the development of a variety of multifamily products.



**Uri Suvalsky**  
Development Manager

Uri joined Journeyman in 2022. He graduated Architecture School from Universidad de Monterrey, Mexico. He is a licensed architect in Mexico and Associate AIA member, underway to become a Texas licensed Architect - providing unique experience to our team.



**Kaleigh Wallace**  
Marketing Coordinator

Kaleigh handles each multifamily projects' branding and advertising. She graduated with a B.A. from UT Austin and has managed the marketing of over 4,000 units since joining the Journeyman Group in 2018.



**Paayal Gupta**  
Development Manager

Paayal graduated from Harvard University. She joined Journeyman in 2021 and previously worked in investment banking and private equity investing. She manages a variety of multifamily projects.

## **ATTACHMENT 2 PRINCIPALS INFORMATION**

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



**JCI Management**  
1000 N Lamar Blvd. Suite 400  
Austin, TX 78703

# JCI Management Management Resume Table of Contents

1. Executive Summary
2. Key Principals
  - Sam Kumar, President
  - Kurt Goll, Vice President
  - Leah Richter, CPA
  - Jennifer Smyth, Regional Property Manager
  - Isis Stolle, Regional Property Manager
  - Jodi Vayo, Property Manager
3. Property Portfolio
  - Previously Managed Properties
  - Currently Managed Properties
  - Future Managed Properties



**JCI Management**  
1000 N Lamar Blvd. Suite 400  
Austin, TX 78703



**JCI Management** was formed in May 2012 to manage our multifamily and hospitality development properties. Sam Kumar is the company President followed by Kurt Goll, the Vice President in charge of Property Management. He oversees all aspects of the company, including staffing, training, lease agreements, and amendments.

At **JCI Management**, each project begins with a management and marketing plan, which identifies procedures and policies. All new employees go through Fair Housing Act training. All leasing and management activities are outlined to comply with Fair Housing and each employee receives regular training both online and in person by upper-level management staff.

Gracehill webinars, Texas Apartment Association webinars, Austin Apartment Association webinars and seminars and hands on training via Property Manager and Assistant Manager are used for training at **JCI Management**. All staff members are required to take one class per month on Gracehill. Examples of courses are:

- Leasing - Customer Relationship Management, Business Ethics, and Sexual Harassment
- Maintenance - Mold Awareness, Ladder Safety I and II, Preventative Maintenance, Preparing Perfect Market Ready Apartments

**JCI Management** utilizes Yardi property management accounting software. All Managers and Assistant Managers are required to take part in a 3-day accounting software training conducted by a Yardi Training Specialist. Follow-up training sessions are scheduled annually. Controller and Corporate Accountants are also required to take part in the annual training sessions. Controller is required to complete 40 hours of CPE to maintain CPA license. Controller trains Corporate Accountants on an ongoing basis.

**JCI Management** employs highly talented leasing professionals and property managers.

Kurt Goll brings over 34 years of multifamily property management and development experience to **JCI Management**. He oversees all properties as well as regional and property managers and has successfully managed over 2500 units in the last 4 years. Kurt has experience in both conventional and affordable multifamily properties.



As Vice President of Property Accounting, Leah has a proven track record in overseeing accounting, financial operations, and internal controls while generating optimal, mutually beneficial results and business outcomes by establishing and strengthening collaborations with other departments and stakeholders. Leah is responsible for monitoring and ensuring compliance with relevant accounting standards and legal requirements, as well as planning and managing overall accounting operations of the Journeyman Group portfolio in compliance with the accounting policies of both the Journeyman Group and its affordable housing partners.

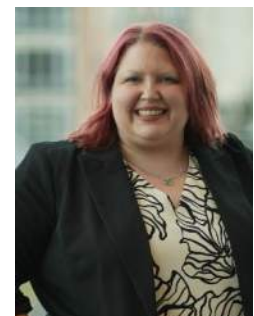


Jennifer Smyth brings 15 years of experience in both conventional and affordable multifamily property management to **JCI Management**. She has been with our firm for 5 years and has served as one of our regional managers for 1 year. Jennifer began her tenure with us as one of our fastest and highest-grossing lease-up managers, making her promotion to regional manager an obvious choice. She currently oversees 1,485 units, including 3 lease-up properties. Jennifer excels in rapidly and effectively leasing up properties while achieving their fullest market pricing potential. She is a tremendous asset to our firm. Her current JCI Management properties include:



- Avery Ranch
- Bridge at Paloma
- Bridge at Three Hills
- Bridge at Windsor Park
- The Park at Speyside

Isis Stolle brings 16 years of experience in both conventional and affordable multifamily property management to **JCI Management**. She has been with our firm for 4 years and has served as one of our regional managers for 2 years. Isis oversees our two tax credit properties, Bridge at Turtle Creek and Bridge at Granada, demonstrating the expertise of a seasoned regional manager. Currently, she manages a portfolio of 1,785 units. Her proficiency in strategic planning, team leadership, and operational efficiency consistently results in employee and property satisfaction as well as improved financial performance. Her current JCI Management properties include:



- Bridge at Delco Flats
- Bridge at Granada



- Bridge at Turtle Creek
- Eastridge
- High Point Preserve
- Park South

Jodi Vayo joined **JCI Management** in 2022 as Property Manager at Eastridge Apartments in Del Valle, and currently oversees the daily operations as Property Manager at Bridge at Three Hills in South Austin. Jodi started her career in property management in 1997 with Littlefield in San Antonio, TX. Jodi brings almost 27 years of knowledge derived from multiple roles in the management industry, as well as her work with the Austin Apartment Association as an instructor for the CAM and NALP designations. Prior to her career in Property Management, she attended UTSA, receiving her Bachelor of Music in Vocal Performance.



**JCI Management**  
1000 N Lamar Blvd. Suite 400  
Austin, TX 78703

**JCI Management** previously managed the following properties:

- Silverado Crossing
- Carrington Oaks
- Belterra Springs
- Southpark Crossing
- The Highlands
- Estancia Villas
- FLORA
- St Johns West
- Stone Hill
- Santa Clara
- Palo Alto
- Pioneer Hill
- Avery Oaks
- Bluebonnet Preserve
- Water Oak

**JCI Management** is currently managing the following properties:

- Avery Ranch
- Bridge at Delco Flats
- Bridge at Granada
- Bridge at Paloma
- Bridge at Three Hills
- Bridge at Turtle Creek
- Bridge at Windsor Park
- Eastridge
- High Point Preserve
- The Park at Speyside

**JCI Management** will manage the following future properties:

- Park South
- The Matador
- Cantarra
- Saffron at Avery Ranch
- Augustine
- Parmer North
- Treeline

| JCI MANAGEMENT - LIST OF MANAGED ASSETS |           |       |       |            |                  |
|---|-----------|-------|-------|------------|------------------|
| Property Name                           | City      | State | Units | Completion | AAHC partnership |
| Bridge at Paloma                        | Austin    | TX    | 300   | Jun-23     | yes              |
| Bridge at Three Hills                   | Austin    | TX    | 280   | Feb-24     | yes              |
| Windsor Park Towers                     | Austin    | TX    | 308   | Apr-24     | yes              |
| Avery Ranch                             | Austin    | TX    | 288   | Nov-23     | yes              |
| Bridge at Delco Flats                   | Austin    | TX    | 186   | Aug-23     | yes              |
| Bridge at Granada                       | Austin    | TX    | 258   | May-21     | yes              |
| Bridge at Turtle Creek                  | Austin    | TX    | 307   | May-23     | yes              |
| High Point Preserve                     | Austin    | TX    | 454   | Mar-23     |                  |
| Eastridge                               | Del Valle | TX    | 300   | Sep-20     |                  |
|   |           | Total | 2681  |            |                  |

## ATTACHMENT 3 FINANCIAL INFORMATION

### 3a. Federal IRS Certification

## **ATTACHMENT 3 FINANCIAL INFORMATION**

### **3b. Certified Financial Audit**

**The Journeyman Group and its affiliates, JCI Residential, JCI Apartments, and JCI Multifamily will be the Special Limited Partners in the transaction. To demonstrate our diverse financial portfolio, we have submitted financials for all 3 affiliate companies, as well as Journeyman Group.**

## ATTACHMENT 3 FINANCIAL INFORMATION

### 3c. Board Resolution



**RESOLUTION NO. 00258**

**A Resolution by the Board of Directors of Austin Affordable Housing Corporation (“AAHC”) authorizing AAHC to execute any and all documents, or take any other action, that is necessary or desirable to participate in the housing tax credit application for Bridge at Treeline**

**WHEREAS**, AAHC will be the sole member of AAHC Treeline GP, LLC, a Texas limited liability company (the “**General Partner**”);

**WHEREAS**, the General Partner shall be the sole general partner of Bridge at Treeline, LP, a Texas limited partnership (the “**Partnership**”);

**WHEREAS**, the Partnership will be formed for the purpose of owning, developing, managing, and otherwise dealing with Bridge at Treeline Apartments, a multifamily affordable apartment complex containing approximately 324 units (the “**Project**”) to be developed on a parcel of land located at approximately 12201 Heatherly Drive in Austin, Travis County, Texas 78747 (the “**Land**”), and intended as affordable housing for rental to persons of low and moderate income;

**WHEREAS**, in connection with the development of the Project, the Partnership plans to submit or has submitted a 4% housing tax credit application to the Texas Department of Housing and Community Affairs (the “**Application**”);

**WHEREAS**, in connection with the Partnership’s preparation and submission of the Application, AAHC desires to participate as nonprofit sponsor, developer, and as sole member of the General Partner;

**NOW, BE IT RESOLVED**, that all of the documents, instruments, or other writing executed by AAHC (both individually and in a representative capacity as identified in these resolutions), in consummation of the transactions herein described (both individually and in a representative capacity as identified in these resolutions), including, but not limited to, (i) the Application and (ii) any and all such additional documents executed to consummate the transactions contemplated herein (collectively, the “**Application Documents**”) shall be in form and substance approved by the Executing Officer (as such term is hereinafter defined), both individually and in a representative capacity as identified in these resolutions, his/her approval of each such instrument to be conclusively evidenced by his execution thereof; and it is further,

**RESOLVED** that the authorization of AAHC, Partnership and/or General Partner to enter into the Application Documents and that execution and delivery in the name and on behalf of AAHC and/or General Partner and/or the Partnership, by any of the officers of AAHC of the

Application Documents, in the form as so executed and delivered is hereby approved, ratified and confirmed; and it is further

**RESOLVED**, that Ron Kowal, Vice President of AAHC, and any other officer of AAHC (each an “**Executing Officer**”), acting alone without the joinder of any other officer, is hereby authorized and directed for and on behalf, and as the act and deed of AAHC and/or General Partner and/or the Partnership, to execute and deliver all other documents and other writings of every nature whatsoever in connection with the development of the Project, including but not limited to, the Application Documents, as the Executing Officer deems necessary in order to carry into effect the intent and purposes of these resolutions, and any other instruments approved by the Executing Officer (acting in a representative capacity as identified in these resolutions, acting individually and on behalf of the General Partner), executing same, his/her approval of each such instrument to be conclusively evidenced by his/her execution thereof, and to take such other action in the consummation of the transactions herein contemplated as the Executing Officer acting shall deem to be necessary or advisable, without the necessity of attestation by the secretary or other officer or director, and any and all acts heretofore taken by the Executing Officer to such end are hereby expressly ratified and confirmed as the acts and deeds of AAHC and/or General Partner and/or Partnership, effective as of the date such action was taken; and it is further

**RESOLVED**, that the Board of Directors finds the actions authorized by these resolutions may reasonably be expected to directly or indirectly benefit AAHC; and it is further

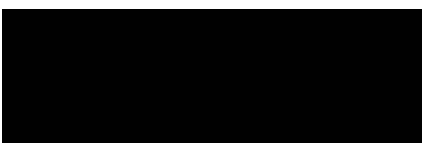
**RESOLVED**, that the Partnership be promptly notified in writing by the Secretary or any other officer of AAHC or any change in these resolutions, and until it has actually received such notice in writing, the Partnership is authorized to act in pursuance of these resolutions.

*[End of Resolution]*

**PASSED, APPROVED AND ADOPTED** this 19th day of September, 2024.

  
EDWINA CARRINGTON, CHAIRPERSON

ATTEST:





## **ATTACHMENT 3 FINANCIAL INFORMATION**

### **3d. Financial Statements**

**Financial Statements To Be Provided  
Separately**

## **ATTACHMENT 3 FINANCIAL INFORMATION**

### **3e. Funding Commitment Letters**

**We have provided a funding commitment letter from Berkadia. The loan amount in our model is lower than that of the commitment letter because we have removed our 70% AMI units, which required us to lower the loan amount to comply with the DSCR minimums.**

## ATTACHMENT 4 PROJECT INFORMATION

### 4a. Market Analysis

## ATTACHMENT 4 PROJECT INFORMATION

### 4b. Good Neighbor Policy

## **Good Neighbor Policy**

Bridge at Treeline Apartments

12201 Heatherly Dr, Austin, TX 78747

Contact:

Garrett Gill

Journeyman Group

1000 N Lamar Blvd, Ste 400

Austin, TX 78703

512-247-7000 | ggill@journeymangroup.com

### **COMMUNICATIONS PLAN FOR NEIGHBORHOOD ENGAGEMENT**

Before any other facets of a development are pursued, Journeyman Group will approach the neighborhood and talk to key stakeholders about the project, target population and share examples of the future development.

The following steps have already or will soon be taken to communicate with the neighborhood surrounding the proposed development located at 12201 Heatherly Dr, Austin, TX 78747.

**Preliminary Research:** Using the City of Austin's Community Registry site and general Internet searches, Journeyman Group researched the neighborhood organizations that contain the proposed site and identified the following active organizations:

- Onion Creek HOA

**Neighborhood Plan** - The development is located outside of an established COA neighborhood plan area.

- 1) Neighborhood Contact** - Journeyman Group will reach out to the priority neighborhood organizations to share information on plans for the development of Bridge at Treeline Apartments. Onion Creek HOA will be updated once those meetings have occurred.

# JOURNEYMANGROUP

- 2) Neighborhood Notification** - The organizations above will be notified as part of the TDHCA notification process. In addition, a rezoning of our property was successfully approved in January 2019– surrounding neighbors and organizations were notified appropriately during this process.
  
- 3) Neighborhood Engagement** - At any upcoming neighborhood meetings, Journeyman Group will present information about their firm, plans for design of the building and talk about who will live at the property and what services will be offered.
  - After initial phone contact, meetings will be scheduled with any organization that should request such.
  - Journeyman Group will invite neighborhood members to volunteer events to get more involved with the project.
  
- 4) Implementation/Ongoing Relations** – Journeyman Group will implement the following processes to encourage ongoing relations with neighborhood members:
  - Neighborhood members will be invited to the Ground Breaking and Ribbon Cutting events that will be held for the property. Neighborhoods will be given recognition for their support.
  - The property will invite neighborhood members to participate in services programs being offered at our community.
  - The property will invite and educate neighborhood members on the many ways to volunteer with the property.
  - Journeyman Group will establish an open-door policy so that neighborhood members will feel comfortable communicating any concerns with either the on-site property management or the single point of contact.

## City of Austin Good Neighbor Checklist

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

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

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

### (1) Preliminary Research

- ☐ Review the Neighborhood Plan (if applicable)

### (2) Neighborhood Notification

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

### (3) Pre-Application Engagement

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

### (4) Application requirements

- ☐ Provide communications plan
- ☐ Provide documentation showing the content of the notice, and proof of delivery
- ☐ Provide signed copy of this checklist.

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

Suruth Sin  
Signed

Garrett Gill  
printed name

7/22/24  
date

July 2024

Treeline Apartments – Introduction

To Whom It May Concern,

This letter is meant to serve as an introduction and notice regarding Bridge at Treeline Apartments, an upcoming Class A apartment community project located at 12201 Heatherly Dr, Austin, Texas 78747. Our hope is to establish a general channel of communication early in the development process to answer questions and to provide a forum for community feedback. Please feel free to reach out to the contacts below and we will respond as soon as possible. Our goal is to provide the area, and Austin as a whole, with quality affordable housing to meet the ever-growing need.

Thanks,

*Garrett Gill*

Treeline Apartments – 12201 Heatherly Dr, Austin, TX 78747

Contact: Garrett Gill

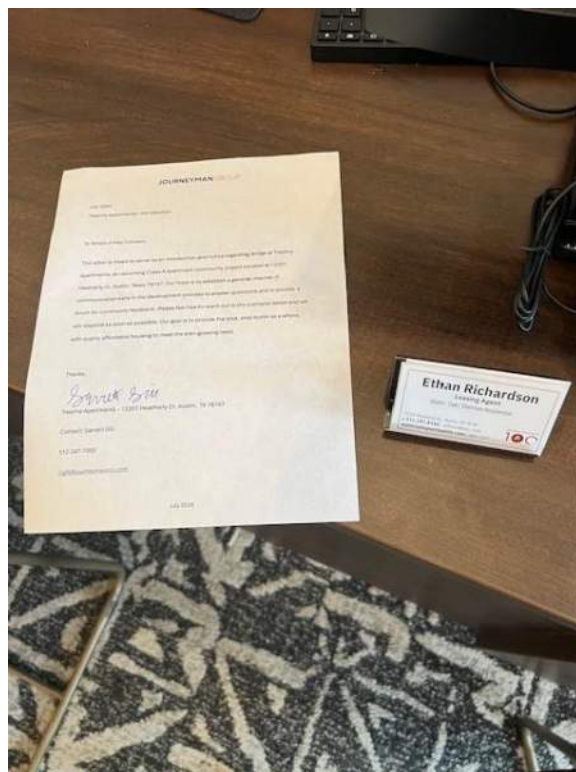
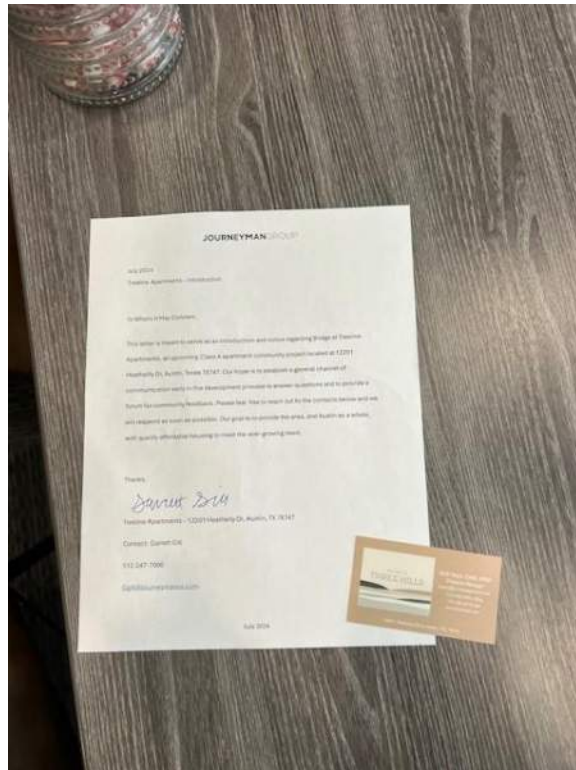
512-247-7000

[Ggill@journeymanco.com](mailto:Ggill@journeymanco.com)

July 2024



# Bridge at Treeline GOOD NEIGHBOR PROOF of DELIVERY



JOURNEYMAN GROUP

## ATTACHMENT 4 PROJECT INFORMATION

### 4c. Smart Housing Letter



# City of Austin

P.O. Box 1088, Austin, TX 78767  
[www.austintexas.gov/department/housing-and-planning](http://www.austintexas.gov/department/housing-and-planning)

## Housing Department S.M.A.R.T. Housing Program

October 14, 2024

**S.M.A.R.T. Housing Certification**  
**Three Hills Land, LLC**  
**12201 Heatherly Dr (ID 965-6072)**

TO WHOM IT MAY CONCERN:

Three Hills Land, LLC (Sam Kumar; [skumar@journeymangroup.com](mailto:skumar@journeymangroup.com); 512.247.7000) is planning to develop Treeline Apartments, a 330-unit multifamily development at 12201 Heatherly Dr, Austin, Texas 78747.

**The purpose of this revision is to increase the total unit count of the project to 330 units, increased from 294 units.**

**The project is now eligible for a 100% waiver of fees, with 330 of the units eligible to receive Austin Water Utility Capital Recovery Fee (CRF) waivers. The project was previously certified for a 100% waiver of fees, with 294 of the units eligible to receive CRF waivers.**

| <b>S.M.A.R.T. Housing – Rental - 12201 Heatherly Dr, Austin, Texas 78747</b>                        |   |
|---|---|
| <b>Total units:</b> 330 units   |   |
| <u>Minimum Required:</u><br>40% (132 units) at or below 80% MFI<br>Requirements for 100% fee waiver | <u>Proposed unit mix:</u><br>40% (132 units) at or below 50% MFI<br>40% (132 units) at or below 60% MFI<br>20% (66 units) at or below 70% MFI |
| <b>Affordability Period (S.M.A.R.T. units):</b> 5 Years   |   |
| <b>Fee waiver level:</b> 100%   |   |
| <b>AWU Capital Recovery Fees:</b> 330/330 units eligible  |   |

Note: This certification letter only reflects the minimum requirements for the relevant program (S.M.A.R.T. Housing). Should the owner choose to participate in other affordability programs, the development may be subject to additional affordability restrictions and/or a longer affordability period.

Because the applicant has proposed a unit mix that meets the minimum program thresholds, the development will be eligible for a waiver of fees listed in Land Development Code, Chapter 25-1-704, as amended or other fees waived under a separate ordinance except for Austin Water Utility Capital Recovery Fees (see below). The fee waiver level is listed above. The project will be subject to its minimum affordability period after issuance of a certificate of occupancy, unless funding requirements are longer.

Based on the requirements under the Texas Local Government Code, Chapter 395.16(g) and 42 U.S.C. Section 12745 (A)(1) as it relates to how housing qualifies as affordable housing, only a certain number of units may be eligible to receive Austin Water Utility Capital Recovery Fee (CRF) waivers. The table above list the number of units which are eligible to receive CRF fee waivers.

The Housing Department certifies the proposed project meets the S.M.A.R.T. Housing standards at the pre-submittal stage. The expected fee waivers include, but are not limited to, the following fees:

AWU Capital Recovery Fees  
Building Permit  
Site Plan Review  
Construction Inspection  
Demolition Permit Fee

Concrete Permit  
Electrical Permit  
Subdivision Plan Review  
Parkland Dedication Fee  
(by separate ordinance)  
Regular Zoning Fee

Mechanical Permit  
Plumbing Permit  
Zoning Verification  
Land Status Determination  
Building Plan Review

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

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

**Before a Certificate of Occupancy will be granted, the development must:**

- ◆ Pass a final inspection and obtain a signed Final Approval from the Green Building Program. (Separate from any other inspections required by the City of Austin or Austin Energy).
- ◆ Pass a final inspection to certify that the required accessibility or visitability standards have been met.
- ◆ An administrative hold will be placed on the building permit, until the following items have been completed: 1) the number of affordable units have been finalized and evidenced through a sealed letter from project architect and/or engineer, 2) a Restrictive Covenant stating the affordability requirements and terms has been filed for record at the Travis County Clerk Office.

The applicant must demonstrate compliance with S.M.A.R.T. Housing standards after the certificate of occupancy has been issued or repay the City of Austin, in full, the fees waived for this S.M.A.R.T. Housing certification.

Please contact me by phone 512.978.1594 or by email at [deadra.johnson@austintexas.gov](mailto:deadra.johnson@austintexas.gov) if you need additional information.

Sincerely,

*DeAdra Johnson*

DeAdra Johnson, Project Coordinator  
Housing Department

Cc: Kristin Martinez, AE

Jonathan Orenstein, AWU

Mashell Smith, ORS

## ATTACHMENT 4 PROJECT INFORMATION

### 4d. MOU with ECHO

**NOT APPLICABLE**

## **ATTACHMENT 4 PROJECT INFORMATION**

### **4e. Resident and Supportive Services**

# **Supportive Services at JCI Management**

Supportive services play a pivotal role in fostering thriving communities within our Tax Credit communities. These services go beyond providing affordable housing; they address the diverse needs of residents, ranging from healthcare access to educational opportunities. This summary of our supportive services program shows the significance of supportive service in all of our affordable community and highlights the benefits for residents and communities alike.

## **Facilities:**

At our tax credit properties, we provide a classroom that is utilized for all types of services. They include, comfortable seating, desks, as well as a large tv for presentations.

## **Services Provided**

**Notary Services:** We provide free notary services within properties. Our notary service helps our residents have access to a service they may not be able to afford or find.

**Recreational Activities:** Recreation is crucial for mental and physical well-being. Offering recreational activities such as sports, arts and crafts, and gardening fosters a sense of community, reduces stress, and promotes social interaction among residents of all ages.

**Social Events:** Social events create opportunities for residents to connect, build relationships, and participate in community life. Events like potlucks, movie nights, and holiday celebrations promote a sense of belonging and strengthen community bonds.

**Scholarship Program:** Education is a pathway to upward mobility. A scholarship program within communities supports residents, especially youth, in pursuing higher education or vocational training, empowering them to achieve their academic and career aspirations.

**Health Fair:** Health fairs provide valuable resources and information on preventive healthcare, wellness initiatives, and access to medical services. These events promote health awareness, encourage healthy lifestyle choices, and address healthcare disparities within the community.

**Fitness Classes:** Regular physical activity is essential for maintaining overall health and well-being. Offering fitness classes such as yoga, aerobics, and dance not only promotes physical fitness but also encourages camaraderie and motivation among residents.

**Tax Preparation Assistance:** Tax preparation can be daunting for many individuals. Providing assistance and resources for tax preparation helps residents navigate the process, maximize tax refunds, and ensure compliance with tax laws.

**On-Site Supportive Services Coordinator:** We feel that if we have one person dedicated to our supportive services program, we can have the best results. It also gives our residents someone on whom they can depend.

## **Marketing**

In addition to all the services we provide within our communities, we do outreach marketing to our local veteran community. Weekly we visit area VFW's as well as VA clinics. Our mission is to provide a luxurious home at an affordable rate to give back to our community, especially veterans.



## JCI MANAGEMENT RESIDENT GUIDEBOOK

Welcome to our community. We are proud to be able to provide our residents with modern and efficient facilities and we hope you are as excited about living in them.

This community was designed and built under the Austin Energy Green Building Multifamily Rating. Below are green features of the building as well as ways that you can utilize the building to enhance the sustainable nature of the facility.

### **Transportation:**

The property will provide a shuttle service for residents from the property to the nearest bus stop. The shuttle will make multiple trips in the morning and evening.

### **Recycling:**

Recycling is an easy way to contribute to minimizing the proliferation of waste and growth of landfills. We encourage residents to separate recyclables from other trash and deposit the recyclables in the labeled containers located adjacent to the trash compactor in the parking lot. If you have any questions please contact 311. The current recycling program accepts the following items:

- Mixed Paper
  - o Newspaper/magazines
  - o Home office paper
  - o Junk mail/envelopes
  - o Catalogs
  - o Cardboard (break down and flatten)
- Plastic
  - o Plastic soda/water bottles
  - o Plastic milk jugs
  - o Plastic food containers (with food particles washed off)
  - o Rigid plastic items (#1 thru #7)
- Metals
  - o Aluminum cans
  - o Tin/Steel cans
- Glass
  - o Glass bottles

Reduce waste even further:

Stop unwanted mail

<http://www.consumer.ftc.gov/articles/0262-stopping-unsolicited-mail-phone-calls-and-email>

<http://stopjunkmail.org/sample/kit.pdf>

<https://www.catalogchoice.org/>

### **Transportation Options:**

We provide the following alternative transportation options to automobile use for residents.

- Secured Bicycle storage and covered bicycle racks are provided and residents are encouraged to make use of the wide array of bike lanes and trails provided by the City of Austin. A map of the bike routes is available at most local bike shops or online at [www.ridethecity.com/austin](http://www.ridethecity.com/austin)

### **Green Building Features**

Below are some of the components that contribute to the energy savings and additional ways that tenants can use the components to save even more energy.



## HVAC (Air Conditioning/Heating)

- The HVAC system provides an energy efficient 15 SEER unit for each apartment meaning that every apartment has individual control over their environment. Additionally, every apartment has a programmable thermostat.
  - o Be sure to adjust the thermostat settings if your unit will be vacant during vacations, holidays, etc.
  - o In the winter, wear a sweater instead of turning up the heat. In the summer, use the ceiling fan before turning down the temperature.
  - o The thermostats are pre-programmed to follow the Energy Star recommended schedule:

| Factory Program<br>Temperatures Recommended by ENERGY STAR®<br>Cooling & Heating Schedule |        |                     |      |                     |      |                   |      |
|---|--------|---------------------|------|---------------------|------|-------------------|------|
|   | PERIOD | WEEKDAYS<br>(5-DAY) |      | SATURDAY<br>(1-DAY) |      | SUNDAY<br>(1-DAY) |      |
|   |        | Start Time          | Temp | Start Time          | Temp | Start Time        | Temp |
| COOL  | MOR    | 6:00 am             | 78F  | 6:00 am             | 78F  | 6:00 am           | 78F  |
|   | DAY    | 8:00 am             | 85F  | 8:00 am             | 85F  | 8:00 am           | 85F  |
|   | EVE    | 5:00 pm             | 78F  | 5:00 pm             | 78F  | 5:00 pm           | 78F  |
|   | NHT    | 10:00 pm            | 82F  | 10:00 pm            | 82F  | 10:00 pm          | 82F  |
| HEAT  | MOR    | 6:00 am             | 70F  | 6:00 am             | 70F  | 6:00 am           | 70F  |
|   | DAY    | 8:00 am             | 62F  | 8:00 am             | 62F  | 8:00 am           | 62F  |
|   | EVE    | 5:00 pm             | 70F  | 5:00 pm             | 70F  | 5:00 pm           | 70F  |
|   | NHT    | 10:00 pm            | 62F  | 10:00 pm            | 62F  | 10:00 pm          | 62F  |

## Lighting

- The lighting system throughout most apartments and common areas utilizes high efficiency compact fluorescent lighting (CFL) or LED lighting.
  - o Residents are encouraged to create additional energy savings by turning off lights in any room that is not immediately occupied. Turning off lights regularly can save 8%-20% on lighting energy consumption.
  - o Keep lights clean. Why? Dust can cut a bulb's light output by 25%.
  - o Disposing CFLs. Like paint, batteries, and other household chemicals, CFLs should be disposed of properly. DO NOT THROW AWAY IN YOUR HOUSEHOLD TRASH. Ask the property manager where the battery and bulb disposal station is located onsite (if available), or deposit it at a hazardous waste facility in your community or at stores that sell bulbs, such as Home Depot, IKEA, etc.

## Ceiling Fans

- Every apartment has ceiling fans in the living room and bedrooms. During the summer, ceiling fans provide air movement that creates a feeling of as much as a 5 degree temperature drop and reduces the need for more cooling from the air conditioning system. During the winter, the ceiling fans can be switched to run in reverse pushing air up against the ceiling which pushes the hot air at the top of the room down to the occupied level and reducing the need for heating from the HVAC system.

- Residents are encouraged to manage energy consumption by running ceiling fans in immediately occupied rooms and to setting thermostats to the Energy Star recommended temperatures. Don't forget to turn the ceiling fans off when leaving any room.

### **Appliances**

- The following appliances in each living unit are Energy Star rated for energy efficiency and/or low-water use, including the dishwasher and refrigerator. Tenants can assist in additional energy and water usage reductions with the following tips:
  - Only run washing machines/dryers and dishwashers with full loads. Partial loads, even with adjusted settings, wastewater and electricity.
  - Wash laundry with cold water, instead of hot. Hot water is only necessary for very dirty laundry.
  - Keep refrigerators set at the minimum setting necessary to maintain the proper temperature for food storage. Keep your fridge between 36- and 38-degrees F. Set your freezer between 0- and 5-degrees F.
  - Limit the opening of the doors and avoid leaving the doors open longer than a few seconds. It is better to open the door multiple times than to leave it open for an extended period.
  - Keep the freezer full. It works more efficiently when full than empty.
  - Use the air-dry option on dishwashers.
  - Scrape dishes instead of pre-rinsing them. Dishwashers made in the past 5-10 years can clean even heavily soiled dishes without pre-rinsing them.
  - Use microwaves and crock pots to cook small meals.
  - Keep the inside of your microwave clean. It improves the efficiency of your microwave.
  - Use lids when cooking. They keep steam in and help food cook more quickly, which saves energy.

The design of the overall building includes water-use efficiencies that equate to using 30% less water than the City of Austin baseline standard. Below are some of the components that contribute to the water-use savings and additional ways that tenants can use the components to save even more water.

- Low-Flow Plumbing Fixtures
  - Low-flow fixtures are installed and are designed to use less water and be equally functional. Residents shall refrain from replacing these fixtures.
  - Take short showers. Why? They use less water than baths. You pay twice for water. You pay one bill for the cost of the water itself. Then you pay a second bill for the cost of heating the water.
  - If dual flush toilets are installed, when the handle is lifted, only 1 gallon of water is used. Use this setting with liquid waste. If the handle is pushed down, 1.6 gallons of water are used. Use this setting with solid waste.
  - Report Leaks. A dripping faucet can cost over \$10 a month and a leaky toilet flapper can also add up fast.

Each living unit is equipped with a ventilation hood over the range/cooktop as well as a ventilation fan in each bathroom and are ducted directly to the exterior of the building.

- Residents should utilize the ventilation hood any time the range/cooktop is used to exhaust heat directly to the exterior and reduce the load on the air conditioning system. Additionally, the hood will exhaust smoke directly to the exterior improving the indoor air quality of the apartment. Be sure to turn the hood off at the same time as the range/cooktop.
- Residents should utilize the ventilation fan in the bathroom anytime the shower is used to exhaust heat and humidity directly to the exterior and reduce the load on the air conditioning system as well as minimizing humidity damage within the apartment.



In addition to the above items, below are additional passive design/construction features that contribute to the sustainable nature of the building.

- Construction Waste Management – over 50% of the construction waste from the project was recycled and diverted from a landfill.
- Low VOC paints and coatings – products used for painting within the building were chosen specifically to ensure that the fumes/off-gassing is minimal to non-existent to provide the highest level of indoor air quality.
- Interior doors, trim and cabinets utilize recycled wood products.

**Monitor Your Energy Usage:** Did you know Austin Energy has a tiered rate structure? The more you consume, the higher (more expensive) the rate tiers are that are used to calculate your bill. This tiered rate structure is designed to encourage energy conservation. The less you use, the cheaper your power becomes! Austin Energy has a free app that allows you to monitor your usage and set up alerts to let you know when you may be entering a new rate tier online. Follow the link below to register and for more information. <https://austinenergyapp.com>

**Laundry:** Each apartment home has washer dryer hook-ups, and a resident can bring their own machines or rent a pair directly from management. All machines provided are High Efficiency machines.

**Pet Policies:** You must clean up after your pets. Bag/trash stations are provided for your convenience at numerous locations on the property. City ordinance requires you to clean up after your pet and to keep dogs on leashes. Pets are only allowed off-leash in the onsite Bark Park or designated areas of city parks. Please see and follow the pet rules posted on the entrance to the Bark Park. There are also numerous apartment homes on the ground floor with attached pet yards available. These pet yards are maintained by management on a weekly basis if pet waste is cleared by the resident.

**Integrated Pest Management:** The property provides regular organic pest control at all building exteriors and within each apartment home. – More information regarding chemicals used and schedules is available to residents upon request.

**Practice Good Housekeeping:** Deter insects by practicing good housekeeping. Keep windows and doors closed and keep food and water in tightly sealed containers.

**Bulbs and Batteries:**

Your community has a recycling station for bulbs and batteries located in the leasing office. There are also several locations around town to drop off household batteries free of charge, including alkaline, nickel cadmium (Nicad), rechargeable, watch, camera, cell phone, laptop and other, similar batteries. Because these locations change on a regular basis, please call the Household Hazardous Waste Facility at 512-974-4343. We do not want any of these items to be thrown into any of the waste bins on the property. If you see anyone placing these types of items into an onsite waste receptacle, please notify office personnel.

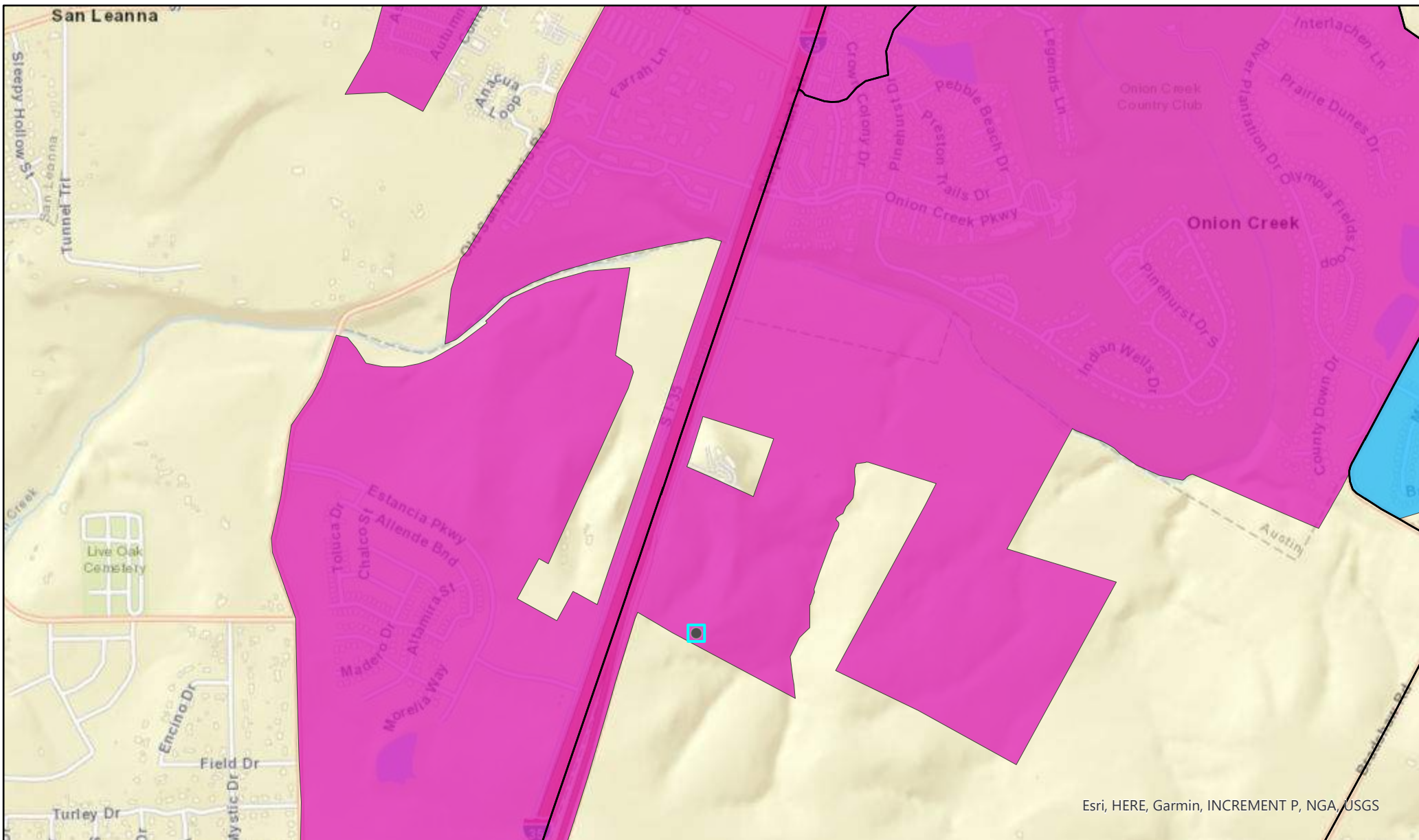
## **ATTACHMENT 5 PROPERTY INFORMATION**

### **5a. Appraisal**

**Will be provided once bank engagement is finalized and an official appraisal is ordered. We have included the TCAD Notice of Appraised Value with this application submission.**

## ATTACHMENT 5 PROPERTY INFORMATION

### 5b. Property Maps



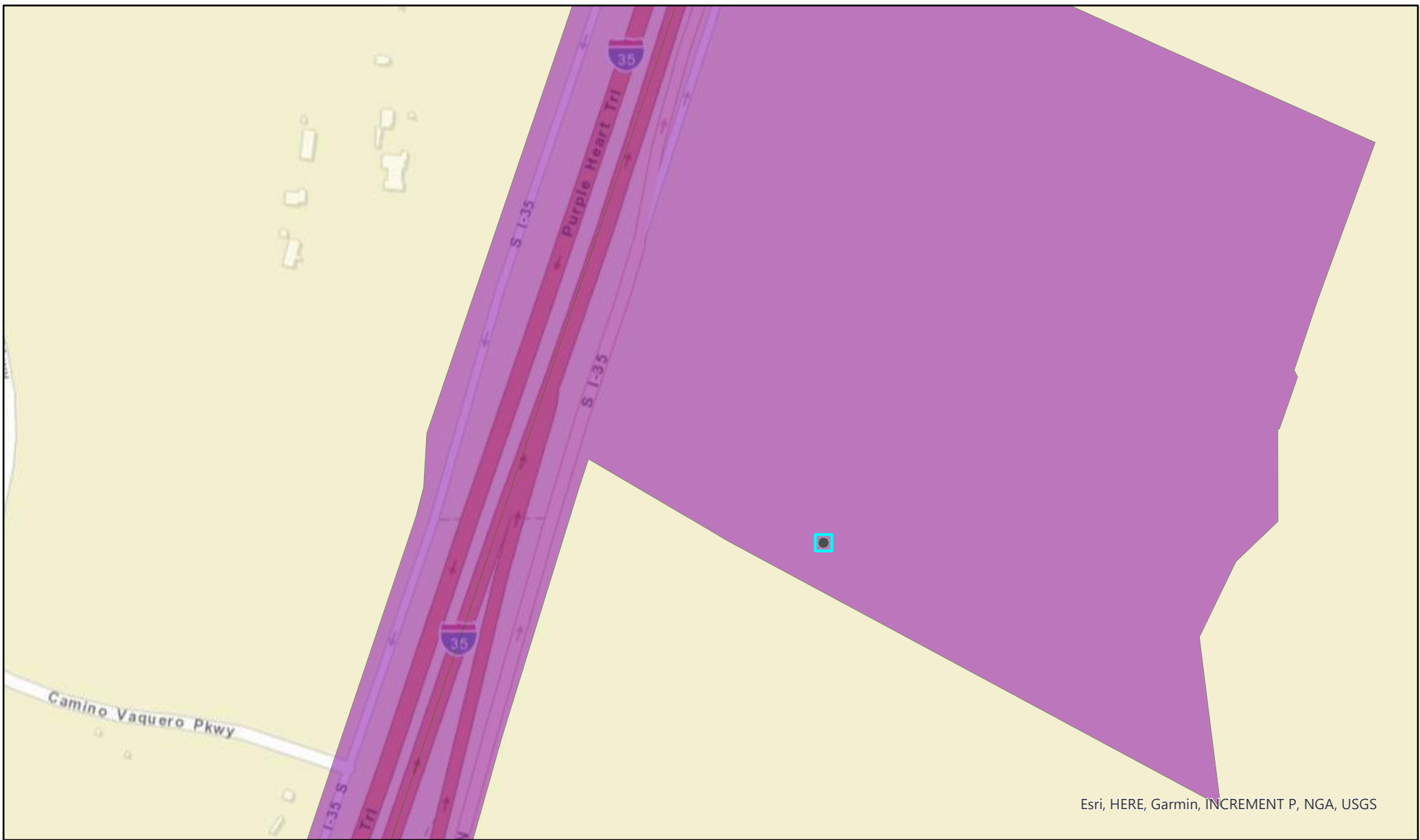
16 July 2024

## Council Districts and Census Tracts



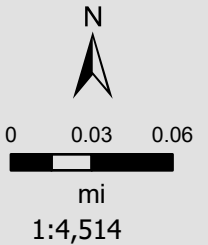
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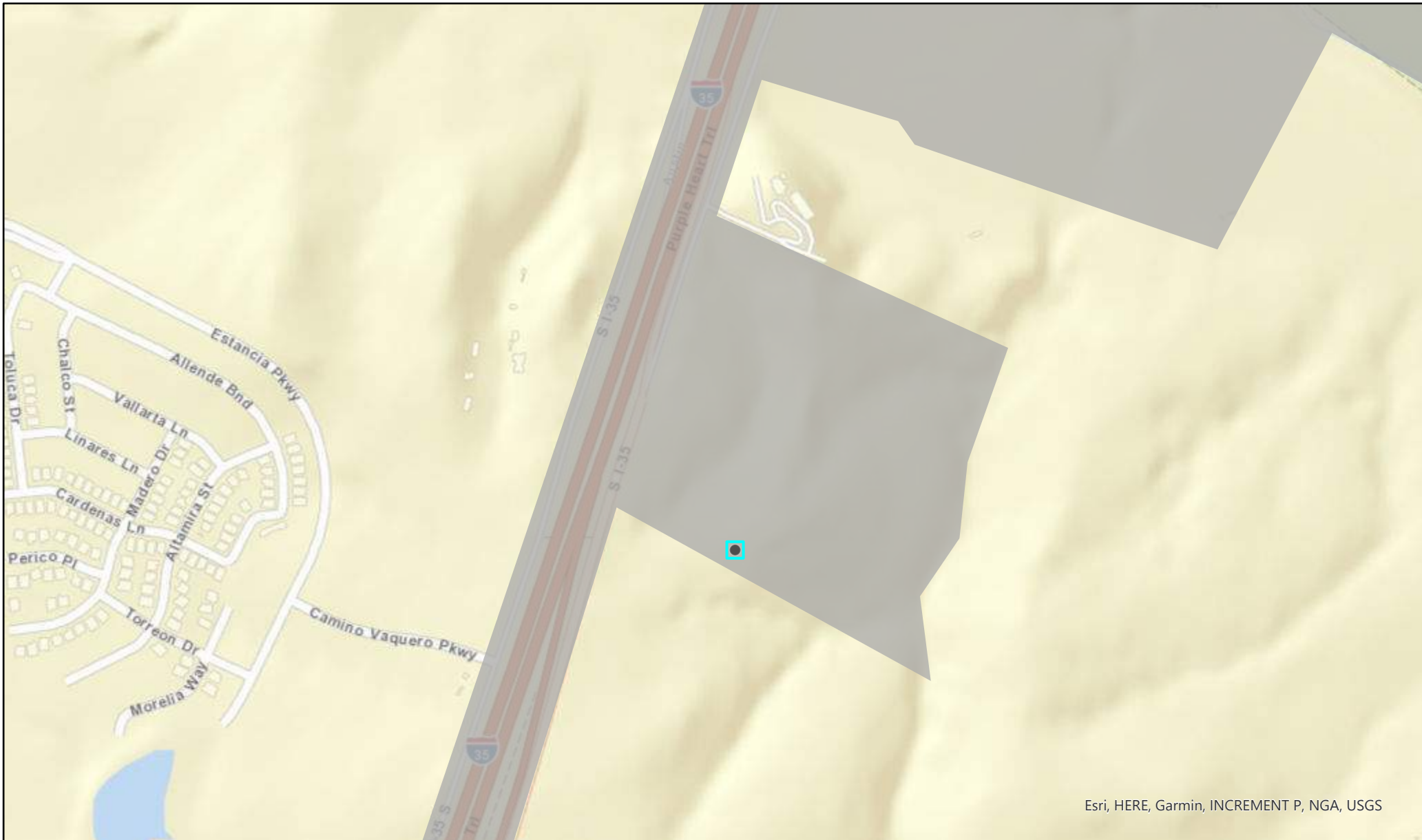
16 July 2024

## Opportunity Values



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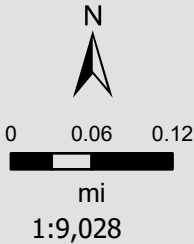


Esri, HERE, Garmin, INCREMENT P, NGA, USGS

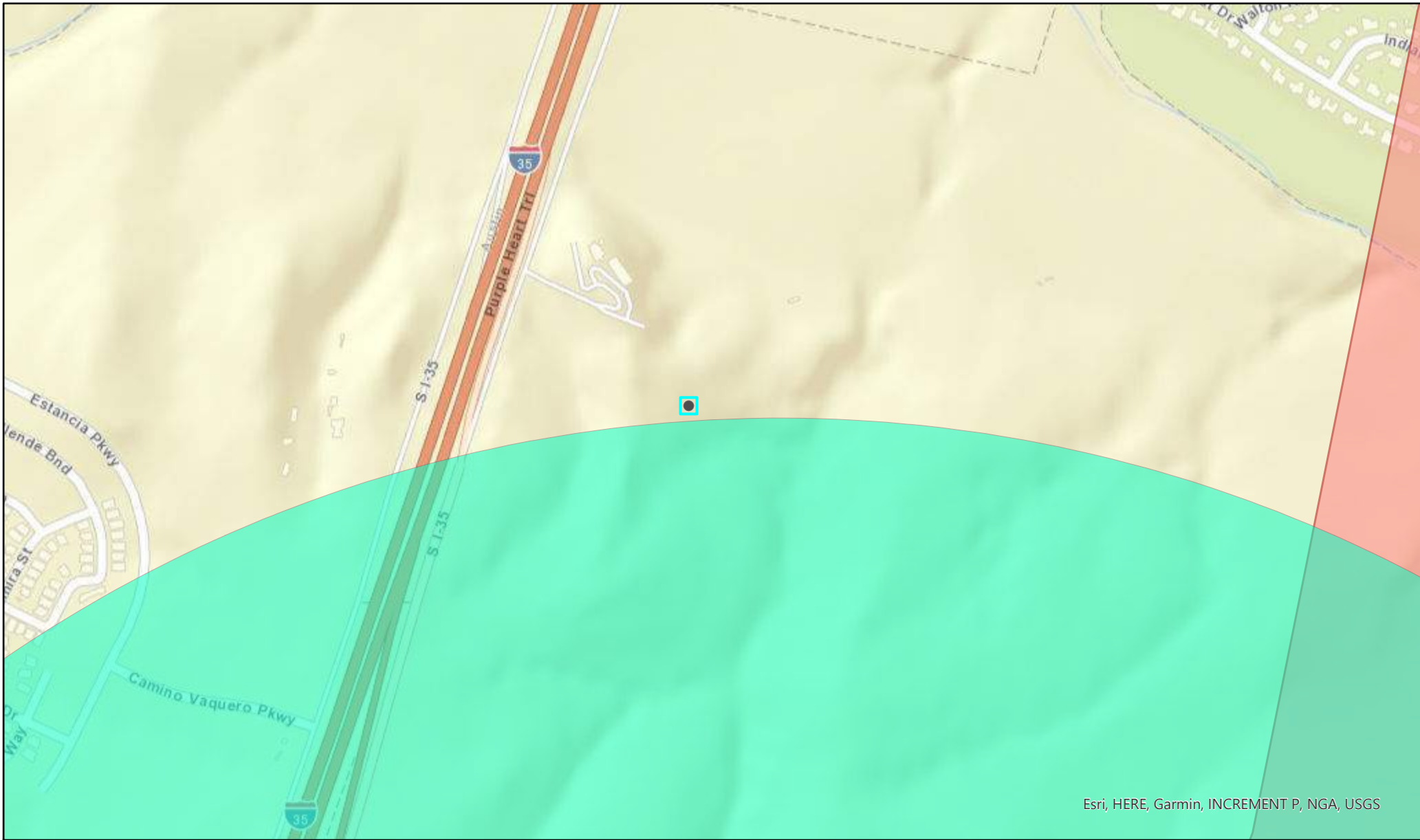


16 July 2024

# Gentrification Values



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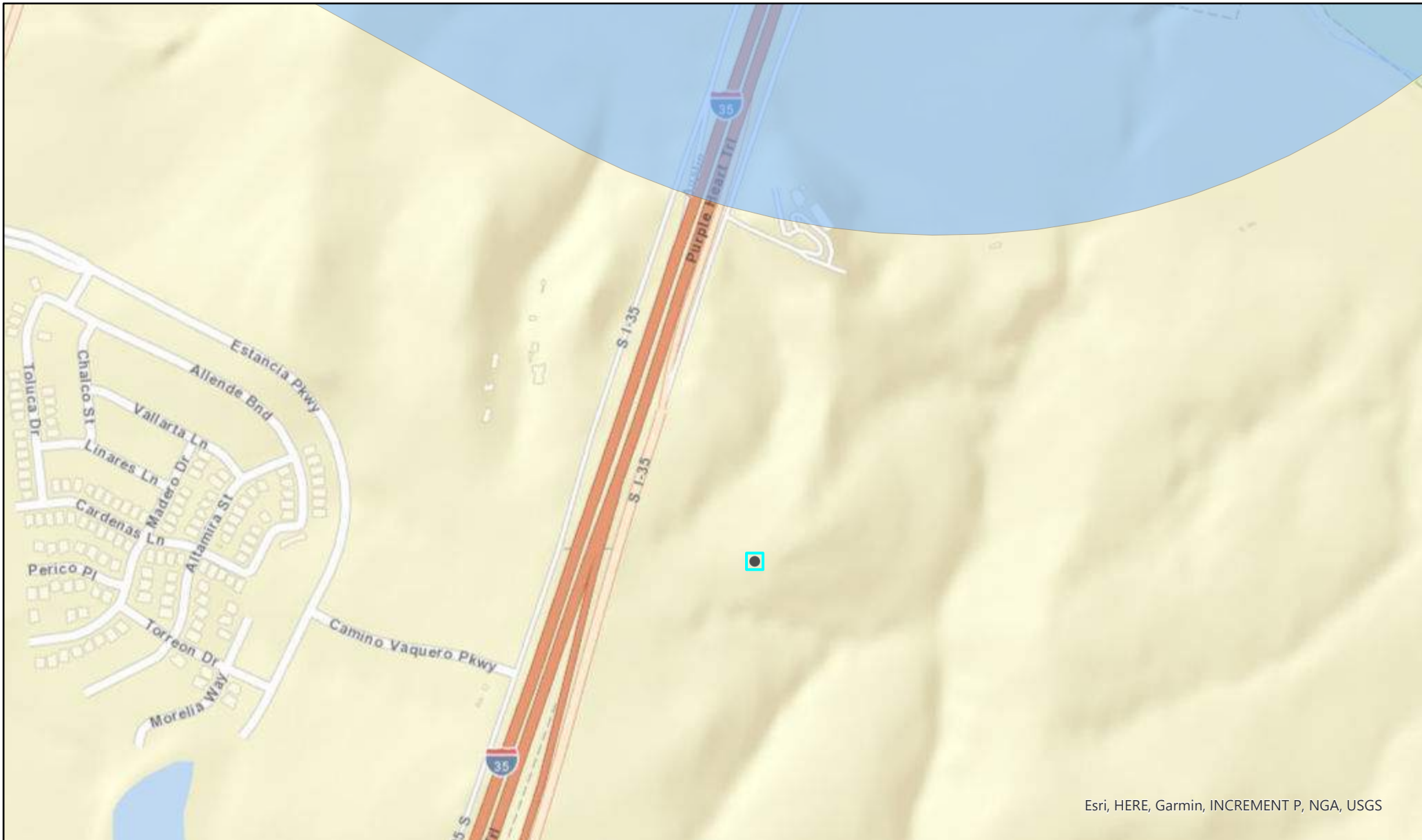


# Imagine Austin Centers, Corridors & Mobility Bond Corridors

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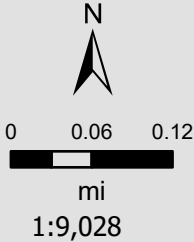


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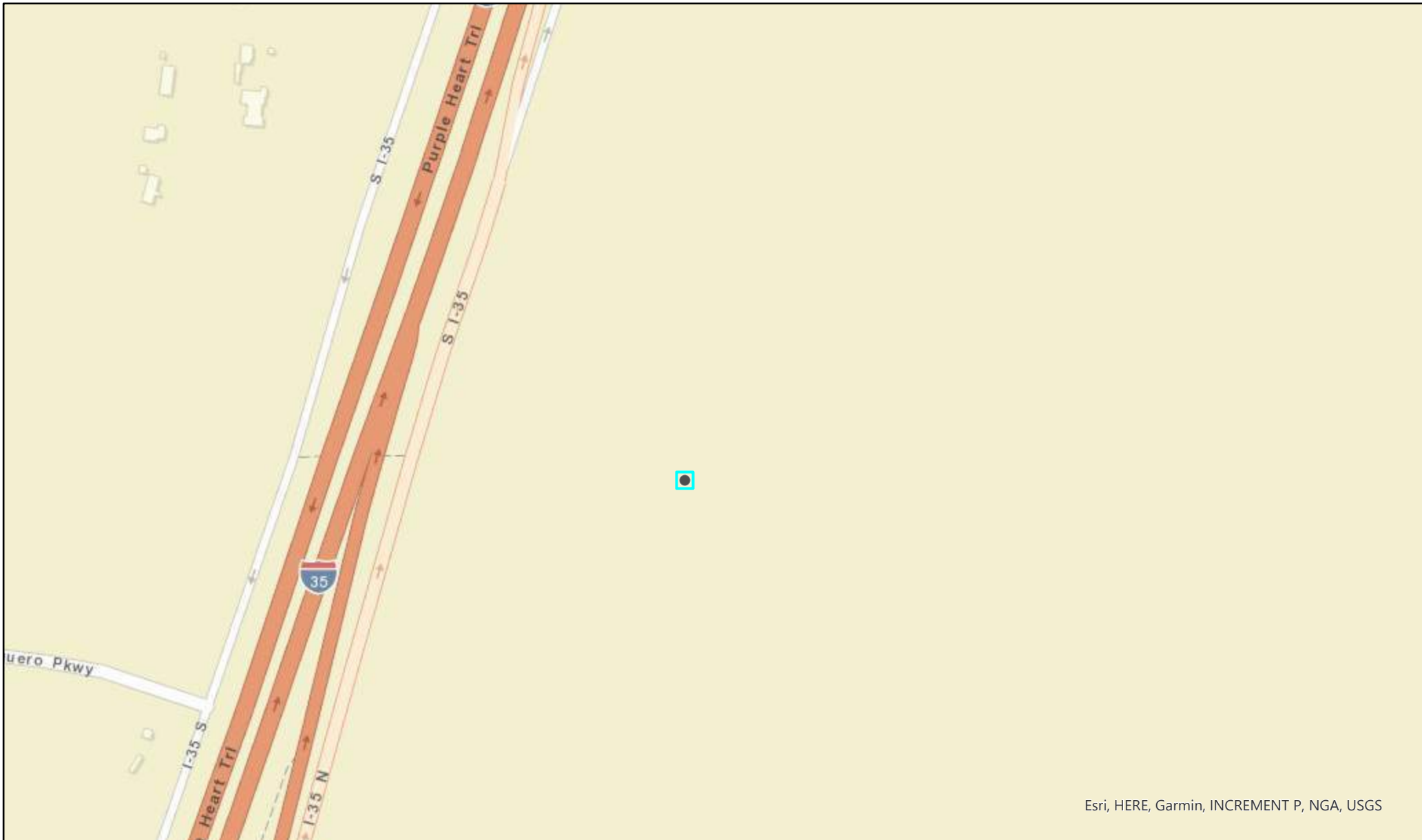


16 July 2024

# Transit

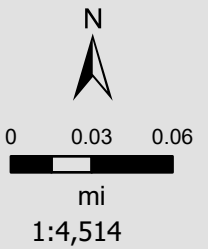


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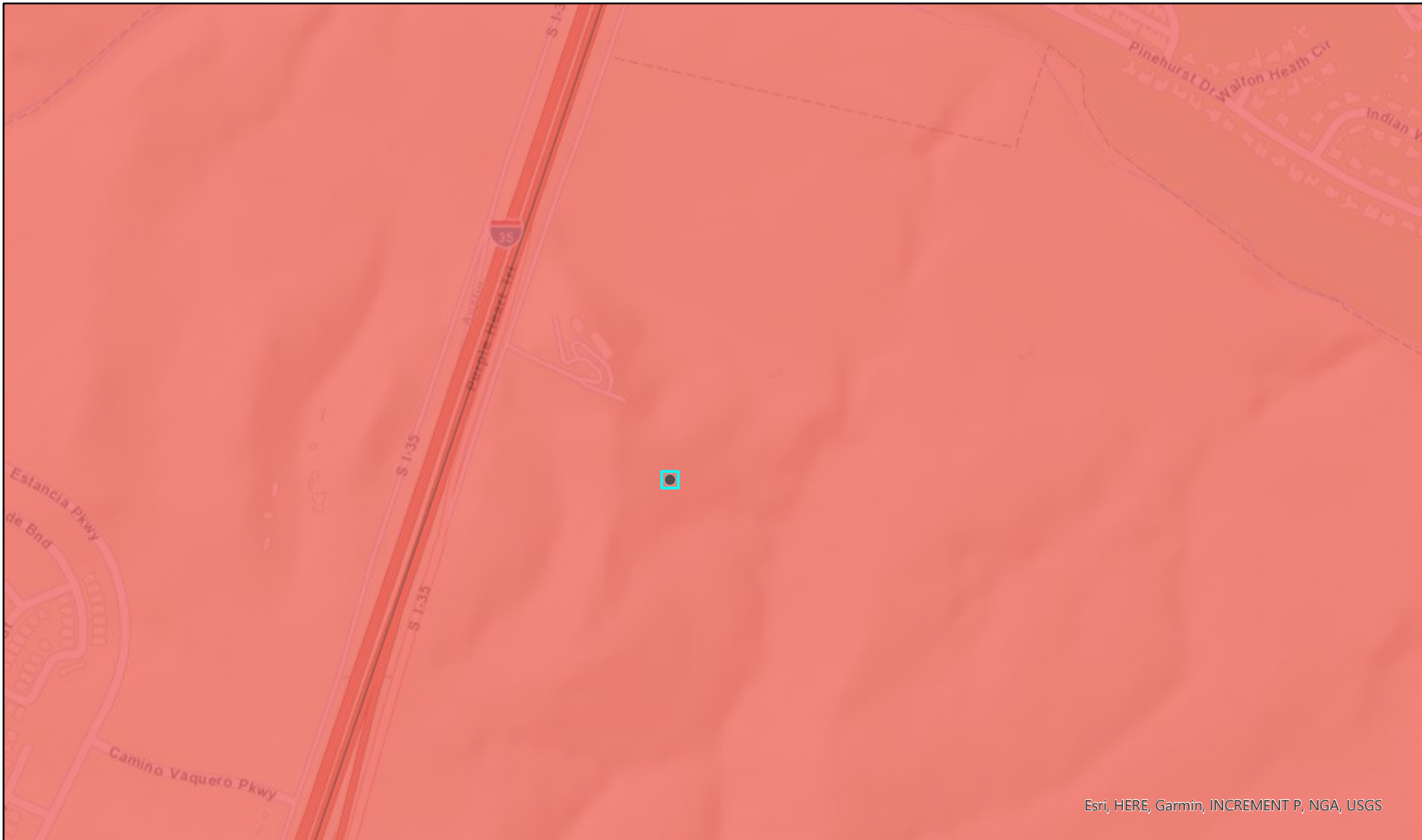


16 July 2024

## Healthy Food

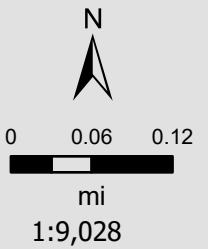


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## Elementary Schools



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Layers

All Available Layers

flood

☒ Environmental

☒ Floodplain

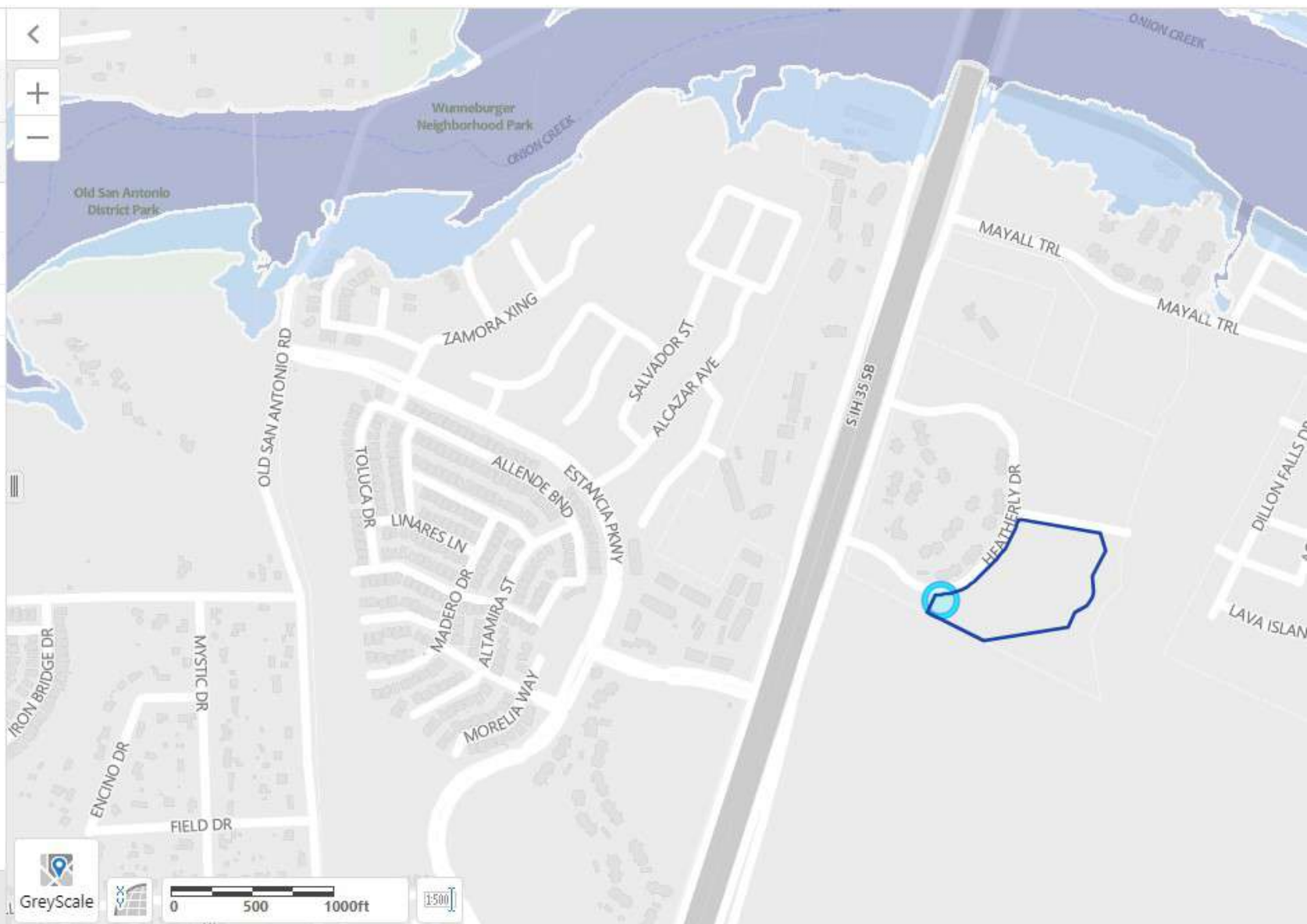
☒ FEMA Floodplain

☒ Fully Developed Floodplain

Home

Layers

Address



## **ATTACHMENT 5 PROPERTY INFORMATION**

### **5c. Zoning Verification Letter**





# CITY OF AUSTIN - ZONING VERIFICATION LETTER

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

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

## Party Requesting Verification

Name: Garrett Gill  
Mailing Address:  
1000 N Lamar Blvd Ste 400  
Austin, TX 78717

## Tax Parcel Identification Number

Agency: TCAD  
Parcel ID: 937680

## Zoning Classification(s)

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

MF-4

## Zoning Case Number(s)

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

C14-2008-0221, C14-2014-0081, C14-2018-0127, C7A-09-001

## Zoning Ordinance Number(s)

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

20090402-014, 20090402-051, 20141106-107, 20190131-074

For Address Verification visit:

<http://austintexas.gov/addressverification>

To access zoning ordinance documentation visit:

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

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

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

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

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

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

A handwritten signature in black ink, appearing to read "Stacy Meeks".

7/28/2022

937680

## ATTACHMENT 5 PROPERTY INFORMATION

### 5d. Proof of Site Control

## ATTACHMENT 5 PROPERTY INFORMATION

### 5e. Phase I ESA