



REQUEST FOR CITY OF AUSTIN SUPPORT
for
2017 LOW INCOME HOUSING TAX CREDIT
APPLICATION



Mueller Apartments
Austin, TX 78723

REQUEST FOR CITY OF AUSTIN RESOLUTIONS
2017 9% Competitive Low Income Housing Tax Credits

This sheet provides a guide for developers requesting resolutions required by the Texas Department of Housing and Community Affairs for 9% Low Income Housing Tax Credit applications for the 2017 Tax Credit Cycle. This form and all attachments will be due no later than close of business on Thursday, December 22, 2016. All resolutions being requested are subject to approval by the Austin City Council. It is anticipated that resolutions will be on the Austin City Council Agenda for the February 9, 2017 meeting.

1. Resolutions. Please indicate which resolutions are being requested from the City of Austin.

- ☒ Resolution of Support from the Local Governing Body
- ☐ Twice the State Average Per Capita
- ☒ One-Mile/Three-Year Rule
- ☐ Limitations on Developments in Certain Census Tracts

2. Commitment of Development Funding by Local Political Subdivision. Funding commitments to developments from the City of Austin will be provided as waived fees through the SMART Housing Program. Letters that comply with the requirements of the QAP will be provided to applicants.

For the request to be considered, please attach the following information:

- 1) Name and address of the Proposed Development
- 2) City Council District Number
- 3) Census Tract Number
- 4) Indicate the type of Development (New Construction, Rehabilitation, Acquisition/Rehabilitation, Replacement)
- 5) Number of Units proposed by type (i.e. Single Room Occupancy, 1BR, 2BR, 3BR, etc.)
- 6) Approximate Size of Units in square feet.
- 7) Number and percentage of units by Median Family Income level.
- 8) Estimated Rents by unit size/type.
- 9) Number and percentage of units dedicated for underserved populations, if any. Underserved populations include: chronically homeless; disabled persons; elderly; veterans; and children aging out of foster care.
- 10) A map (8 1/2" x 11") indicating the property location and the distance a resident would actually have to walk on a paved surface to get to the nearest transit stop.
- 11) A flood plain map generated by www.ATXFloodPro.com with the property parcel identified and the legend displayed showing the various types of FEMA Flood Plain zones, if any.
- 12) Provide a table of proposed Sources and Uses for the project. It should contain all proposed funding sources, including the amount of tax credits to be requested from TDHCA.
- 13) Describe Resident Services that may be provided to tenants.
- 14) Provide information about planned on-site amenities (e.g. recreation facilities, computer lab, Wi-Fi).
- 15) Provide information about the Developer's Experience and Development Background.

Requests should be submitted to Neighborhood Housing and Community Development, 1000 East 11th Street, 2nd Floor, Austin, TX 78702 to the attention of Ellis Morgan. For more information, contact Ellis Morgan at 512-974-3121 or by e-mail at ellis.morgan@austintexas.gov. E-mailed submissions are acceptable in PDF format.

Deadline to Submit: 5:00 pm, Thursday, December 22, 2016.

I certify that, to the best of my knowledge, the attached information provided is true and correct.

Authorized Representative



Date

12/21/16

1) Name and address of the Proposed Development

Mueller Apartments located at the future corner of Philomena Street and Tilley Street in Austin Texas, 78723

2) City Council District Number

District 9

3) Census Tract Number

Census Tract 3.06

4) Indicate the type of Development (New Construction, Rehabilitation, Acquisition/Rehabilitation, Replacement)

New Construction

5) Number of Units proposed by type (i.e. Single Room Occupancy, 1BR, 2BR, 3BR, etc.)

Mueller Apartments will be 129 units of affordable, multifamily rental units serving the general population.

Unit Type	# of Units
1 BR/1 BA	35
2 BR/2 BA	65
3 BR/2 BA	29
TOTAL UNITS	129

6) Approximate Size of Units in square feet.

Unit Type	Square Footage
1 BR/1 BA	794
2 BR/2 BA	1061
3 BR/2 BA	1335
TOTAL Approx. SF	135,470

7) Number and percentage of units by Median Family Income level.

Median Family Income Level	# of Units	% of Total Units
30% MFI	13	10%
50% MFI	64	50%
60% MFI	52	40%
TOTAL UNITS	129	

8) Estimated Rents by unit size/type.

Median Family Income Level	Unit Type	Size	Estimated Rent
30% MFI	1 BR/1 BA	794	\$391
50% MFI	1 BR/1 BA	794	\$683
60% MFI	1 BR/1 BA	794	\$829
30% MFI	2 BR/2 BA	1061	\$464
50% MFI	2 BR/2 BA	1061	\$815
60% MFI	2 BR/2 BA	1061	\$990
30% MFI	3 BR/2 BA	1335	\$533
50% MFI	3 BR/2 BA	1335	\$937
60% MFI	3 BR/2 BA	1335	\$1140
	AVERAGE	1050	\$631

9) Number and percentage of units dedicated for underserved populations, if any. Underserved populations include: chronically homeless; disabled persons; elderly; veterans; and children aging out of foster care.

The target population of Mueller Apartments is families with children. Most of these families will consist of working parents with children. 10% of the property (13 units) will be reserved for families transitioning from homelessness into a stable housing and financial environment as part of FC's Children's HOME Initiative program. Mueller Apartments will have 13 units (10% of the property) that are accessible to persons with Mobility Impairments using Section 504 and Fair Housing Accessibility as guidelines. The property will also have 3 units (2% of the property) that are accessible for persons with hearing and/or visual disabilities.

Mueller Apartments will affirmatively market to veterans.

10) A map (8 ½" x 11") indicating the property location and the distance a resident would actually have to walk on a paved surface to get to the nearest transit stop.

See attached transit map.

11) A flood plain map generated by www.ATXFloodPro.com with the property parcel identified and the legend displayed showing the various types of FEMA Flood Plain zones, if any.

See attached flood plain map.

12) Provide a table of proposed Sources and Uses for the project. It should contain all proposed funding sources, including the amount of tax credits to be requested from TDHCA.

Please see attached Sources and Uses.

13) Describe Resident Services that may be provided to tenants.

Foundation Communities will provide free, supportive service programs that will educate, support and improve financial standing for residents of Mueller Apartments. Supportive Service programs to be offered ON-SITE at community spaces located at Mueller Apartments include:

Afterschool Program – Children living at Mueller Apartments will be able to attend the after-school program in the on-site community learning center. Foundation Communities’ afterschool programs offer academic assistance, enrichment activities, fitness activities, nutrition lessons and provide support services and educational opportunities for parents as well. Our PATHS (Planning Ahead Toward Health and School Success) program helps low-income children address low reading scores and obesity/inactivity/poor nutrition, setting them on a path to lifelong self-sufficiency and success. FC maintains a strong relationship with nearby schools with teachers and after-school staff working together to help each child succeed. Our afterschool programs currently serve over 600 students each year.

Summer-Youth Program – Children living at Mueller Apartments will be able to attend the summer-youth program to be held in the on-site community learning center. The goal of the Summer Youth Program is to provide a structured, supervised environment where youth can gain exposure to a variety of summer learning and enrichment activities, develop important social skills, and work toward a brighter future. In addition, the program will:

- provide free access to rewarding, hands-on educational, cultural, artistic, and recreational activities for youth ages 5-14.
- retain educational gains made during the school year.
- provide a structured, supervised time with caring adults who model and reward positive behavior and interaction.
- supply free, nutritious lunches and snacks five days per week.

Children’s HOME Initiative –Thirteen units (10%) at Mueller Apartments will be set-aside for families participating in FC’s Children’s HOME Initiative. The CHI program provides low-cost transitional housing for up to 18 months to families who are considered Extremely Low Income (at or below 30% of the area’s MFI). By engaging in case management services, families are able to outline their path toward permanent affordable housing and work to achieve an independent and healthy lifestyle.

Health Initiatives – Mueller Apartments will connect residents to local health resources and offer on-site programming including: free health fairs, exercise classes and nutrition and cooking classes.

The following services will be provided for residents participating in the CHI program at Mueller Apartments:

- Computer training
- Intensive Case Management
- Individualized Family Support
- Crisis Management
- Financial Literacy
- Debt Management

- Children's Advocacy
- Educational Support
- Career Awareness & Enrichment
- Long-term Goal Development
- Resource Brokering

Other Supportive Service programs provided by Foundation Communities, but located OFF-SITE include:

- Financial Education
- Financial Coaching
- Matched Savings Accounts
- Microenterprise assistance
- College Savings & Financial Assistance

Supportive Service Experience - Foundation Communities, as the primary supportive service provider at Mueller Apartments, has 20 years experience in the provision of supportive services to its residents. At all of our properties, we enable our residents to increase their personal development, education, safety, and health at one convenient location in their neighborhood. Through strategic partnerships, last year FC gave 600+ children of working parents a safe place to go when school's out right where they live and helped 85% of students maintain or improve grades. Talented volunteers help us increase adults' earning potential through classes in English as a Second Language, GED preparation, and computer skills, as well as employment counseling and social service referrals. Each year, we also empower more than 100 families to become smart consumers through economic education and at least 50% of them to reduce debt. More than 125 families have earned a 2-to-1 match in special savings accounts to purchase a home, attended college, or started a business. We also provide free income tax preparation for 20,000+ low-income workers and retirees with the help of 400 IRS-certified volunteers.

The Children's HOME Initiative Program (CHI) is the only program of its kind in Austin. In 2003, Foundation Communities launched CHI to address the overwhelming need in the community for quality affordable housing for families with incomes of 30% of the Median Family Income. Grants from NeighborWorks America, a national funder, enabled us to pay down mortgages at three of our apartment complexes and permanently set aside apartments to create this program; 10% or more of every new family property we open will be reserved for CHI. Of a dozen national housing organizations that were granted similar funding, FC was the first to get the program up and running and has the longest and most successful track record. We have developed a successful model for helping families with extremely low incomes achieve self-sufficiency by providing stable housing and intensive case management. Since 2003, CHI has supported close to 300 families and more than 600 children in regaining housing and economic stability.

14) Provide information about planned on-site amenities (e.g. recreation facilities, computer lab, Wi-Fi).

Unit features will include ceiling fans, microwave, dishwasher, refrigerator with icemaker, self-cleaning ovens, washer/dryer hook-ups, nine foot ceilings, granite or solid surface countertops, and ceramic flooring. On-site amenities will include a learning center with computer lab,

playground and BBQ/picnic areas. Green features will include high efficiency HVAC and water heaters, energy star rated appliances and ceiling fans, LED lighting, low voc paints and adhesives, and formaldehyde-free cabinets and counters.

15) Provide information about the Developer's Experience and Development Background.

Please see attached Organizational Resume.

Foundation Communities has 20 years of experience contracting for and overseeing the construction and rehabilitation of affordable housing. As the owner and manager of more than 3,200 apartments across 22 properties, Foundation Communities has built a strong development team and has worked together on many projects. Eight of our existing communities were new construction projects financed with tax credits with two additional communities (140 units) currently in design and construction. Fourteen of our communities were purchased as existing properties and greatly improved with renovations, green spaces and playscapes, learning centers, landscaping, signage, lighting and green building features (solar panels and rain water harvesting). Six properties are single room occupancy permanent supportive housing, two properties are duplexes and the remaining 14 properties are multifamily properties.

Funding Experience: Foundation Communities, Inc. has experience utilizing all funding tools available for the development of affordable multifamily housing. We have an excellent track record of securing funding in competitive allocations of the 9% LIHTC. We also have solid relationships with multiple lenders. Three most recently completed projects utilize the following five layers of funding: 9% LIHTCs, City of Austin RHDA funding, FHLB AHP program, construction/permanent loan and private fundraising.

LIHTCs and BONDS

Foundation Communities has applied for and been awarded 9% LIHTCs for 10 developments. Two of these awards were forward commitments by the Texas Department of Housing Board of Directors giving testament to Foundation Communities track record of high-quality developments with compelling missions. FC's development team is well-versed in the LIHTC program and application process. All applications are completed in-house by staff. Staff also closely follows the drafting of the Qualified Allocation Plan and is aware of changes to threshold and scoring items that impact a high-scoring application. FC has a staff team that has over 15 years of tax credit compliance with a record of no significant findings. FC also has relationships with multiple tax credit investors including Enterprise Community Investment and Bank of America.

Foundation Communities built and financed the Southwest Trails Apartments utilizing 4% LIHTC and private activity bonds. Bonds were issued by Austin Housing Finance Corporation.

City of Austin RHDA

The City of Austin has been a major contributor on every project completed by Foundation Communities in the past 10 years. The FC Development team follows the release of the City's application rules and NOFA and has a solid working relationship with City of Austin NHCD/AHFC staff.

Private Mortgages

Foundation Communities has excellent relationships with several lenders that allow for competitive rates and pricing. We currently have private mortgages with Compass BBBVA, Bank of America, Wells Fargo and Greater Texas Federal Credit Union.

Private Fundraising

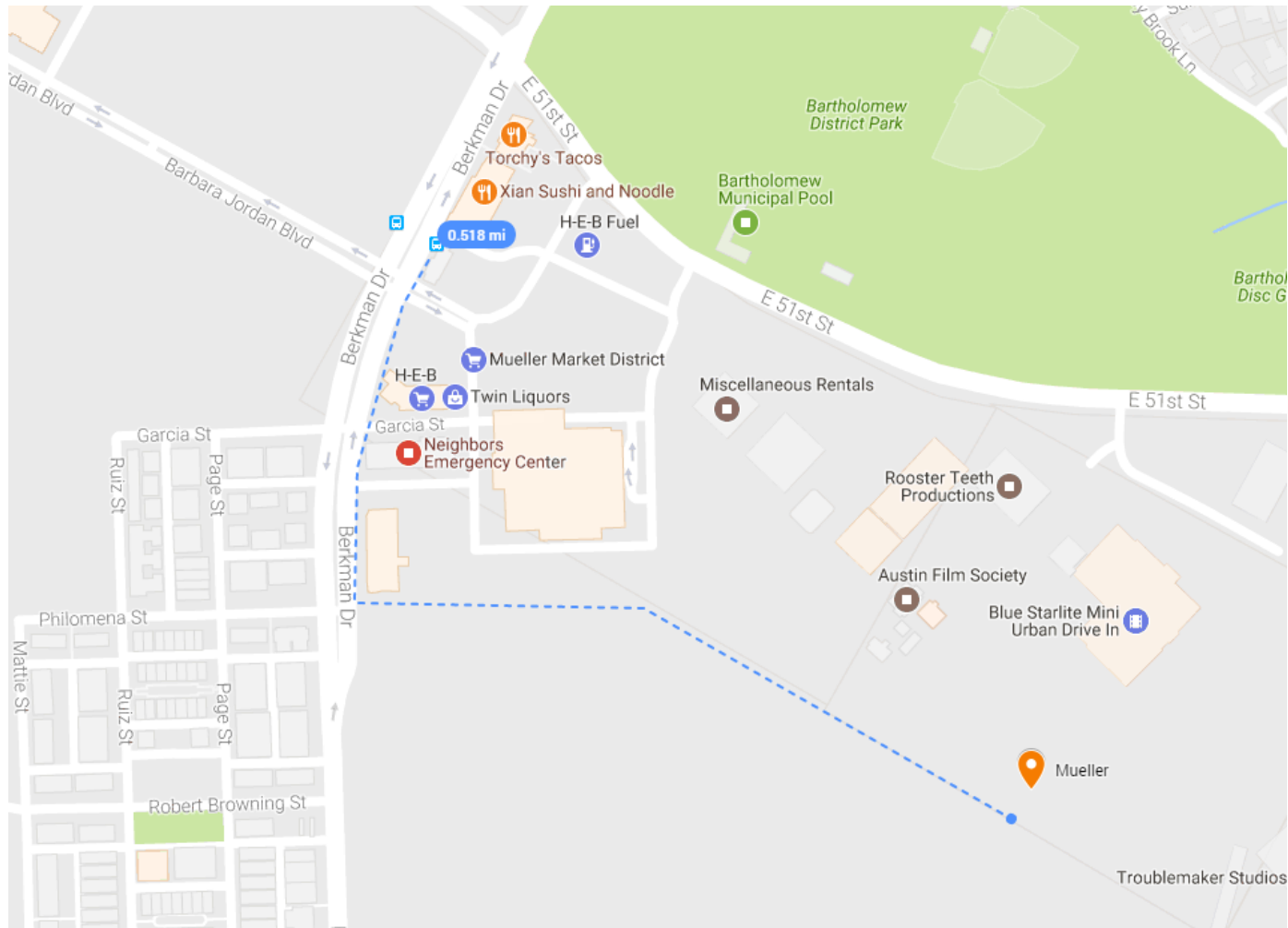
Unlike most affordable housing developers, Foundation Communities has a very strong track record of private fundraising and individual donations. Past large foundation donors include Meadows, Topfer, Kendeda, Enterprise, Home Depot, St. David's, and the Michael & Susan Dell Foundations. FC hosts an annual Welcome Home Luncheon which raises approximately \$1 million from individual donors to fund supportive services and programs.

Transit Map

Route to Nearest Transit Stop



Route to Nearest Transit Stop



Development Resume



FOUNDATION COMMUNITIES RESUME



FOUNDATION COMMUNITIES

At Foundation Communities, we create housing where individuals and families succeed. By combining affordable housing and social services, we empower low-income residents by teaching them the tools and providing the support they need to stabilize and improve their economic standing. Free, on-site programs within our communities eliminate barriers like cost and transportation. **We work in four focus areas:**

1

OPENING DOORS TO HOMES

We own and manage more than 3,200 apartments across 22 properties—19 in Austin and three in the Dallas/Fort Worth area—providing quality homes for both families and individuals. We are committed to having the greenest properties possible, from construction to remodeling to educating residents.

2

HEALTHY COMMUNITIES

All FC residents have access to health amenities, resources, and food pantries. We have 707 supportive housing apartments where single adults who have been homeless, are on fixed incomes, or who have chronic health problems and disabilities can reach their maximum level of self-sufficiency. To support families coming out of homelessness, we created the Children's HOME Initiative. These 135 apartments, integrated throughout our affordable housing communities, provide reduced rents and case management support to help vulnerable families move from crisis and instability to long-term self-sufficiency.

3

LEARNING IN A COMMUNITY

This year, our on-site Learning Centers will give 1,000 children of working parents considerable academic support and a safe place to go when school is out. 85% of these students maintain or improve their grades. Adult education is a priority as well. At these same Learning Centers, adult classes offered include computer skills, English as a Second Language, and financial literacy.

4

SAVING FOR THE FUTURE

We provide free tax preparation in Austin for more than 20,000 low income workers and retirees each year, with the help of 700 IRS-certified volunteers. Refunds amount to more than \$32 million per year, and can equal 25 percent of a family's annual income. More than 600 families annually become smart consumers through financial education and one-on-one financial coaching; at least 50% of them reduce their debt. Matched savings plans assist families in saving to purchase a home, attend college, or start a business. The Cash for College programs assist over 1,000 students annually with federal student aid forms and potential scholarships; most of these students are the first in their families to attend college.

BUILDING/PROPERTIES:

Foundation Communities builds and manages award-winning affordable housing in Austin. FC now has 22 properties and has developed seven new affordable housing communities in the past five years, with another to open in 2017.

Under construction, opening in 2017:

CARDINAL POINT: 120 units of family housing at 11011 ½ Four Points Drive, new learning center.



BLUEBONNET STUDIOS:

107 units of service-enriched permanent supportive housing at 2301 South Lamar Blvd., opening December 2016



LAKELINE STATION:

128 units of family housing at 13635 Rutledge Spur; new learning center, opening December 2016



LIVE OAK TRAILS:

58 units of family housing at 8500 Highway 71; children will use the learning center at Southwest Trails, FC's property right next door, opening December 2016



HOMESTEAD OAKS:

140 units of family housing at 3226 W. Slaughter Lane, new learning center. Opened 2015; full occupancy 2016.



CAPITAL STUDIOS:

135 units of permanent supportive housing at 309 East 11th St.; new construction, opened 2014. The first affordable housing to be built in downtown Austin in more than 40 years. Austin Business Journal's Commercial Real Estate Award for Multi-Family Development (rental).



ARBOR TERRACE:

120 units of permanent supportive housing; opened 2012. Rehab of former extended-stay hotel. ABJ Commercial Real Estate Award/Multi-Family Development (rental).



M STATION:

150 units of family housing; opened 2011. New construction. LEED Platinum certification, Enterprise Green Communities certification, and Austin Energy Green Building 5-Star rated community. Numerous awards, including Austin Green Award; Reader's Choice Award/Affordable Housing Finance Magazine; Affordable Property of the Year/Austin Apartment Association; Social Impact Award/ABJ Commercial Real Estate Awards.





EDUCATION

Foundation Communities has 11 on-site Learning Centers, with two more under construction, that serve 1000 children each year with educational programming. Offerings range from pre-literacy for 3-and 4-year-olds to teen programs. 800 elementary school kids who live in our housing and the surrounding communities attend our year-round afterschool and summer program, where we work with local elementary schools to identify students' needs. This academically-focused program (3 hours each school day, 5-6 hours in the summer) includes reading, homework help, physical activity, and enrichment.

We also serve adults and entire families in our education programs. Free Minds is a year-long cooperative program with UT and ACC, designed for adults who have never attended college or are returning after a long absence; they receive six college humanities credits upon completion. Other adult classes include computer skills, English as a Second Language, exercise classes, and healthy cooking.



FINANCIAL STABILITY

Foundation Communities' Financial Stability programs help more than 25,000 people each year across our community.

- The Community Tax Centers prepare more than 20,000 tax returns each year in Central Texas, totaling more than \$32 million in refunds.
- Incentivized savings allow families to save for emergencies, higher education, home purchase, or starting a business.
- Financial education and financial coaching give individuals and families the resources they need for economic stability and success, including credit repair and budgeting.
- Cash for College helps students with FAFSA forms and figuring out how to apply for college and for scholarships. We work with the Mexican Consulate to administer scholarships to immigrant families.



HEALTH INITIATIVES

Health Initiatives are fundamental to family success and bring healthy living education, activities, and resources to our residents and the community.

- We connect residents to local health resources, in addition to on-site programming: free health fairs, exercise classes (Zumba to yoga), healthy food pantries, gardens, support groups for substance abuse and recovery, and bilingual nutrition and cooking classes.
- Insure Central Texas has enrolled more than 15,000 people in marketplace insurance enrollment under the Affordable Care Act; Community Health Workers and Navigators help patients with complicated medical conditions (cancer, AIDS) find plans that work with their medical providers.
- Green Initiatives are engaged from construction through instruction; whole families benefit from healthier products and cost savings. As lifetime owners of our properties, we create the greenest homes possible, using solar panels and other features to save money in the long run.



FOUNDATION COMMUNITIES

We have an active board made up of residents and community leaders. Staff members are drawn from a wide variety of cultures and skills. The common thread: commitment to Foundation Communities' mission and to serving the community.

Community volunteers tutor students, serve as scholarship mentors, prepare taxes, work as financial coaches, and prepare "Welcome Home" baskets and supper club meals for Foundation Communities' residents.

Financing is fully diversified and, as much as possible, sustainable. 80% of our \$35 million budget comes from apartment rentals. The rest is grants and individual donations. We receive grants from governmental sources (federal, state, county, city), foundations, and corporations. Individual donors include "Homebuilders," who make multi-year pledges.



FOUNDATION COMMUNITIES PARTNERS—Services and Programs

Learning Centers:

Creative Action
Oak Hill Rotary Club
City Square
Any Baby Can
Literacy Coalition
of Central Texas
Breakthrough Austin
College Forward
Boy Scouts & Girl Scouts
of Central Texas
Inner City Outings
Texas Civil Rights Project

(Children's Home Initiative)

CHI Partners:

Assistance League
of Austin
Capital Area Counseling
Capital Area Food Bank
Goodwill Industries
of Central Texas
Travis County Child
Protective Services
Housing Authority
of the City of Austin
The University of Texas
School of Social Work
Ending Community
Homeless Coalition
City of Austin Health
and Human Services
Department
St. David's Foundation
Religious Coalition
to End Homelessness

Financial Programs:

LifeWorks
Round Rock Public Library
Workforce Commission
Housing Authority
of Austin
United Way
Financial Literacy
Coalition of Central Texas
IRS
UT McCombs School
of Business

Health Initiatives:

WeViva
Keep Austin Fed
Sustainable Food Center
Planned Parenthood
University of Texas
School of Public Health
Texas A&M Agrilife
Extension
Capital Area Food Bank
Phoenix House
LiveStrong
Kids Vision for Life
Lifeworks
National Alliance on Mental
Illness
Seton Healthcare
Mobile Mammography
Gilbert's Gazelles

Permanent Supportive Housing:

Passages
Easter Seals
Casey Foundation
Austin Energy
Lone Star Circle of Care
Caritas of Austin
Salvation Army
Austin Recovery
Communities for Recovery
Austin Clubhouse
Family Eldercare
The University of Texas at
Austin School of Nursing
Integral Care (formerly
Austin/Travis Co. MHMR)
YMCA of Austin
Austin Area
Mental Health Consumers
Self Help and Advocacy
Center
Downtown Austin
Community Court
Project Transitions
Veterans Affairs
Supportive Housing program



FOUNDATION COMMUNITIES STAFF RESUMES - Walter Moreau

Walter Moreau

walter.moreau@foundcom.org | 512-610-4016

AREAS OF EXPERTISE

Nonprofit leadership, asset building, asset management, strategic planning, green construction, program design

EXPERIENCE

Executive Director

1997-Present

Foundation Communities
Austin, TX

- Leads the development and growth of Foundation Communities in pursuit of our mission to create housing where families succeed.
- Ensures that FC is a financially self-reliant organization with low debt. 80% of our operating budget is covered by rental income and the balance is raised from a diverse base of institutional investors and individual donors. Oversees annual fundraising of over \$6 million.
- Provides leadership of our growing portfolio of 3,000 units with a market value of over \$200 million. We have a staff of more than 350, an annual operating budget of over \$30 million, and current real estate development projects of over \$100 million.
- Led the creation and funding of 15 new affordable housing communities, overcoming numerous “not in my backyard” opposition efforts.
- Developed our supportive housing model for extremely low income and homeless single adults. We provide a home and wraparound services for 600 SRO residents.
- Maintains green building as a top priority—FC is the largest private producer of solar power in the region.
- Launched our first learning center in 2004, which today has grown to ten centers and over 700 students in free afterschool academic programs. Learning centers have become the heart of each community and offer pre-k, elementary, teen and adult programming.
- Created an array of health programs for residents and surrounding neighborhoods, ranging from Zumba to psychiatric nurse teams and everything in between.
- Created our “Community Financial Centers,” which offer free tax prep (over 30,000 returns and \$45 million in refunds), IDA savings accounts, college financial aid, financial coaching, and health insurance enrollment (over 11,000 clients enrolled in the last two years).

Private Consultant

1992-1994

Austin, TX

- Worked with fifteen nonprofit and public affordable housing clients on a variety of projects. Raised over \$8.5 million in subsidy funds for the development of 446 units in both urban and rural settings.
- Facilitated the sale and financing of four communities (871 units / \$9.2 million in value) from the Resolution Trust Corporation to non-profit owners.
- Designed a Neighborhood Energy Conservation Program for Dallas Habitat for Humanity.
- Wrote three technical reports for the U.S. Department of Health and Human Services on financial management issues for grantees of the Ryan White Care Act.

FOUNDATION COMMUNITIES STAFF RESUMES - Julian Huerta

Julian Huerta

julian.huerta@foundcom.org | 512-610-4013

AREAS OF EXPERTISE

Planning, implementing and evaluating educational opportunities and social services

EXPERIENCE

Deputy Executive Director and Director of Programs

1998-Present

Foundation Communities
Austin, TX

- Develops and directs educational and social service programs that assist families residing in affordable housing communities to increase their self-sufficiency.
- Hires, trains and supervises professional staff at multiple sites.
- Researches and authors grant proposals to public and private sources.
- Collects participation and outcomes data, conducts program assessments, and submits reports to funding agencies and Board of Directors.
- Collaborates with other community-based organizations and public agencies to maximize opportunities available to residents.

Executive Director

1996-1997

Literacy Austin
Austin, TX

- Provided leadership for all programs, hired and supervised staff, and prepared and implemented annual budget in order to achieve agency mission.
- Directed public relations, community outreach and fundraising initiatives, including proposal writing, corporate and individual solicitations and special events.
- Collaborated with United Way, Community Action network partners and, citizen groups and other community-based organizations to coordinate and maximize services to disadvantaged residents of Travis County.

Information Systems Coordinator

1993-1996

American Institute for Learning
Austin, TX

- Collected and analyzed data from multiple education and human service programs.
- Oversaw eligibility determination, assessment and enrollment of participants.
- Hired, trained and supervised Information Systems, intake and clerical staff.
- Participated in the evaluation of agency programs, including designing and conducting research on client outcomes.



FOUNDATION COMMUNITIES STAFF RESUMES - Ann Elise Clift, CPA

Ann Elise Clift, CPA

ann.clift@foundcom.org | 512-610-4032

AREAS OF EXPERTISE

Real estate and nonprofit accounting and management

EXPERIENCE

Chief Financial Officer

2008-Present

Foundation Communities
Austin, TX

- Manages accounting and finance for construction and operations of FC properties.
- Produces monthly consolidated financial statements.
- Creates budgets for all FC programs and properties.
- Established FC's Central Reserve funds in 1997 and Growth Fund in 2013
- 25 years of audits for FC with no findings.

Staff Accountant

2001-2008

Foundation Communities
Austin, TX

- Prepared monthly and annual financial reports and records.
- Prepared and analyzed budgets for each of FC's new and existing properties and programs to ensure our growth was financially sound.

Independent CPA

1994-2001

Austin, TX

- Provided bookkeeping services to various small businesses.
- Clients encompassed a multitude of different industries including construction, homeowner associations, restaurants, media production services, retail establishments and nonprofit organizations.
- Compiled monthly combined financial reports for Foundation Communities.

ACCREDITATIONS

- Licensed Certified Public Accountant
- Member, Texas Society of Certified Public Accountants



FOUNDATION COMMUNITIES STAFF RESUMES - Vicki Beal McDonald

Vicki Beal McDonald

ann.clift@foundcom.org | 512-610-4032

AREAS OF EXPERTISE

Asset management, supervision of property construction and remodeling

EXPERIENCE

Director of Asset Management

2005-Present

Foundation Communities
Austin, TX

- Oversees FC's real estate portfolio, valued at over \$100 million.
- Key member of FC's development team, assisting in renovation of existing properties and acquisition and construction of new properties.

Activities in this role:

- Provided oversight on renovation of Spring Terrace, Skyline Terrace, Sierra Vista and Arbor Terrace—a total of 482 units.
- Provided oversight on construction of M Station, Capital Studios, Homestead, Bluebonnet Studios, Lakeline Station and Live Oak Trails—a total of 718 units.
- Currently working with development team on expansion of Cardinal Point Apartments and Garden Terrace.

Owner

1984-2006

Vista Properties
Austin, TX

- Owned and operated Vista properties, a real estate firm that specialized in the management, leasing and brokerage of income-producing assets including multifamily, office and retail portfolios.
- Performed property and asset management services for a variety of institutional and individual real estate owners across six-state service area.
- Brokered over fifty million dollars' worth of commercial real estate.

ACCREDITATIONS

- Licensed Texas Real Estate Broker
- Member, Certified Commercial Investment Institute
- Member, Texas Apartment Association

FOUNDATION COMMUNITIES STAFF RESUMES - Jennifer Hicks

Jennifer Hicks

jennifer.hicks@foundcom.org | 512-610-4025

AREAS OF EXPERTISE

Affordable housing finance, deal structuring, project management, land acquisition, federal, state and local affordable housing policy, property tax exemption

EXPERIENCE

Director of Housing Finance

2002-Present

Foundation Communities
Austin, TX

- Leads the development and funding of FC's affordable housing pipeline. Has developed and funded 14 affordable housing communities (1,559 units) and nine Learning Centers since assuming this role.
- Leads the development of FC's supportive housing model for extremely low income and homeless single adults and families. Has developed 783 SRO units since assuming this role.
- Identifies, secures and structures funding for each FC community. Has secured over \$218 million in grants and loans from public and private sources.
- Coordinates application and closing of funds from the following sources: conventional banks, tax credit equity investors, Low Income Housing Tax Credit program, City of Austin Rental Housing Development Assistance program, HOME, Community Development Block Grant Program, Federal Home Loan Bank, NeighborWorks America, HUD 221(d)(4) and Capital Magnet Fund.
- Facilitates the refinancing of eligible properties in the FC portfolio.
- Leads the Real Estate Development Committee of the FC Board of Directors.
- Plans development criteria and assists with evaluation and negotiation of potential development projects.
- Helps manage funder compliance and reporting.
- Maintains compliance with tax exemption requirements for entire FC portfolio.

Development Associate

2001-2002

Foundation Communities
Austin, TX

- Assisted with a variety of funding applications for the development of affordable multi-family housing.
- Planned the financing, design and management of the first Single Resident Occupancy property in Austin.
- Identified and initiated negotiation on suitable properties for acquisition.

PROJECTS LIST

- Garden Terrace – 103 units, 1015 W. William Cannon. Purchased 2003 and remodeling completed 2008.
- Spring Terrace – 142 units, 7101 N. I-35. Remodeling completed 2006.
- Skyline Terrace – 100 units, 1212 W. Ben White. Remodeling completed 2008.
- M Station – 150 units, 2906 E. MLK, Austin. Construction completed 2011.
- Sierra Vista – 238 units, 4320 S. Congress Ave. Remodeling completed 2012.
- Arbor Terrace – 120 units, 2501 S. IH 35. Remodeling completed 2012.
- Capital Studios – 135 units, 309 E. 11th Street. Construction completed 2014.
- Homestead Oaks – 140 units, 3226 W. Slaughter Lane. Construction completed 2015.
- Live Oak Trails – 58 units, 8500 W. Highway 71. Construction completed 2016.
- Bluebonnet Studios – 107 units, 2301 S. Lamar Blvd. Construction completed 2016.
- Lakeline Station – 128 units, 13635 Rutledge. Opening 2016.
- Cardinal Point – 120 units, 11011 ½ Four Points Drive. Opening 2017.



FOUNDATION COMMUNITIES STAFF RESUMES - Julie Ann Candoli, J.D.

Julie Ann Candoli, J.D.

julie.candoli@foundcom.org | 512-610-4027

AREAS OF EXPERTISE

Fundraising, creating and sustaining community partnerships, growing and supervising grants team

EXPERIENCE

Director of Institutional Giving

2011-Present

Foundation Communities
Austin, TX

- Fundraising for both capital and program budgets.
- Creates, builds, and fosters partnerships with sustainable institutional funders, resulting in multi-year grants. Works with individual donors on large gifts.
- Maintains relationships with national organizations and affiliates.
- In five years, built grant portfolio from \$2.6 million to over \$9 million in annual funding.
- Built team of grant writers and grants administrator/reporter; training for staff and interns.
- Program grant areas include: supportive services, financial literacy/tax services, volunteer support, green and environmental building and services, education (both children and adults), health initiatives, relief from homelessness.

Manager of Government and Foundation Relations

2008-2011

Austin Museum of Art
Austin, TX

- Development and fundraising, including strategic planning, grant writing, donor campaigns, donor and board interface, and liaison with foundations and governmental agencies.
- Grant writing and reporting at every level, including corporate giving, foundations, and federal, state, and local governments.
- Additional writing for publicity/marketing, exhibitions, and education materials.

Consultant Grant Writer and Strategic Planner

2006-2008

Austin, TX

- Grant writing and implementation, including federal grants.
- Strategic planning – budgeting, prioritizing resources, facilitation of collaboration between nonprofits and with community groups and funders.

FOUNDATION COMMUNITIES STAFF RESUMES - Sunshine Mathon

Sunshine Mathon

sunshine.mathon@foundcom.org | 512-610-4019

AREAS OF EXPERTISE

Green building, site planning, designing and managing construction processes, permitting and zoning compliance

EXPERIENCE

Development + Design Director

2007-Present

Foundation Communities

Austin, TX

- Brings FC's values to life by designing green, safe, affordable and beautiful homes for our residents.
- Manages and administrates construction of new properties and remodeling and modifications to existing properties that are highly rated by the Leadership in Energy and Environmental Design (LEED) system created by the United States Green Building Council and by the Austin Energy Green Building program.
- Acts as coordinating pivot point between architects, contractors, City officials and granting agencies to ensure compliance with all project requirements.
- Facilitates cooperation between teams to ensure that projects are completed in a timely manner and in accordance with budgets.

Recent Foundation Communities Green Accomplishments:

- Cardinal Point – 120 units currently under construction; four-star Austin Energy Green Building rating and expected LEED Gold certification.
- Lakeline Station – 128 units opening December 2016; five-star Austin Energy Green Building rating.
- Live Oak Trails – 58 units opening December 2016; four-star Austin Energy Green Building rating.
- Bluebonnet Studios – 107 units; five-star Austin Energy Green Building rating and LEED Platinum certification.
- Homestead Oaks – 140 units; four-star Austin Energy Green Building rating and LEED Gold certification.
- Capital Studios – 135 units; four-star Austin Energy Green Building rating and expected LEED Platinum certification.
- M Station – 150 units; five-star Austin Energy Green Building rating and LEED Platinum certification.

PROJECTS LIST

- Skyline Terrace – 100 units, 1212 W. Ben White. Remodeling completed 2008.
- M Station, 150 units – 2906 E. MLK, Austin. Construction completed 2011.
- Sierra Vista, 238 units – 4320 S. Congress Ave. Remodeling completed 2012.
- Arbor Terrace, 120 units – 2501 S. IH 35. Remodeling completed 2012.
- Capital Studios, 135 units – 309 E. 11th Street. Construction completed 2014.
- Homestead Oaks, 140 units – 3226 W. Slaughter Lane. Construction completed 2015.
- Live Oak Trails, 58 units – 8500 W. Highway 71. Construction completed 2016.
- Bluebonnet Studios – 107 units, 2301 S. Lamar Blvd. Construction completed 2016.
- Lakeline Station – 128 units, 13635 Rutledge. Opening 2016.
- Cardinal Point – 120 units, 11011 ½ Four Points Drive. Opening 2017.



FOUNDATION COMMUNITIES STAFF RESUMES - Sandra Lumley

Sandra Lumley

sandra.lumley@foundcom.org | 512-610-4018

AREAS OF EXPERTISE

Real Estate, Property Management

EXPERIENCE

Property Management Director

1991-Present

Foundation Communities

Austin, TX

- Oversees the day to day operations of our Austin portfolio, which consists of 2552 units—1845 family property units and 707 Supportive Housing units.
- Maintains an interactive and constructive relationship with other departments to maximize our portfolio value as well as streamline reporting while continuously re-evaluating and updating policies and procedures.
- Supervises District Managers and assists in development of specific marketing and leasing plans for each property.
- Supervises the Compliance Director to ensure the unique funding requirements for each property are met so that future funding and tax credits can be secured.
- Collaborates with Property Managers and their teams to ensure that all Property Management offices are appropriately staffed and trained to operate effectively in accordance with FC standards.
- Works with Green Initiatives team to implement policies that are environmentally friendly and cost-effective for FC.
- Collaborates with Asset Management team to determine budgets for each property and to ensure that properties remain in excellent operating condition.
- Forecasts revenue during the annual budget process for each property based on the specific funding guidelines required. Reviews and updates this forecast throughout the year.

ACCREDITATIONS

- Certified Apartment Manager and Property Supervisor through the National Apartment Association
- Credential for Green Property Management from the National Affordable Housing Management Association



FOUNDATION COMMUNITIES STAFF RESUMES - Aubrie Christensen

Aubrie Christensen

aubrie.christensen@foundcom.org | 512-610-7972

AREAS OF EXPERTISE

Acquisition, design and construction of multi-family affordable housing projects

EXPERIENCE

Development Project Manager

2014-Present

Foundation Communities

Austin, TX

- Conducts feasibility analysis of land for new developments.
- Ensures projects meet federal and local funding requirements including ADA compliance.
- Oversees the design and permitting process.
- Selects and manages design and construction consultants.
- Attends weekly construction meetings.
- Ensures projects stay within budget and meet completion deadlines.
- Coordinates hand-off from construction team to operations team.
- Manages documentation and compliance of green building certifications including LEED, Enterprise Green Communities, Austin Energy Green Building, and Living Building Challenge.

PROJECTS LIST

- Capital Studios – 135 units, 309 E. 11th Street. Construction completed 2014.
- Homestead Oaks – 140 units, 3226 W. Slaughter Lane. Construction completed 2015.
- Live Oak Trails – 58 units, 8500 W. Highway 71. Construction completed 2016.
- Bluebonnet Studios – 107 units, 2301 S. Lamar Blvd. Construction completed 2016.
- Lakeline Station – 128 units, 13635 Rutledge. Opening 2016.
- Cardinal Point – 120 units, 11011 ½ Four Points Drive. Opening 2017.

FOUNDATION COMMUNITIES STAFF RESUMES - Tillie Croxdale

Tillie Croxdale

tillie.croxdale@foundcom.org | 512-610-0829

AREAS OF EXPERTISE

Affordable housing finance and development, property management, asset management, energy management and capital planning

EXPERIENCE

Real Estate Project Manager

2015-Present

Foundation Communities
Austin, TX

- Assists with securing financing, preparing loan and grant applications, following public agency and lender compliance requirements and conducting feasibility analyses for new development opportunities.

Facilities Administrator

2013-2015

Holsten Management Corporation
Chicago, IL

- Assisted with capital planning.
- Maintained productive relationships with vendors.
- Responded to building violations issues.
- Monitored new construction and inspected units and common areas.
- Prepared properties for external agency inspections.

Property Manager

2011-2013

Heartland Alliance/Heartland Housing
Chicago, IL

- Managed a 137 unit tax credit development with a target population of individuals that were formerly homeless and struggled with mental illness, substance abuse and/or physical disabilities.
- Supervised a staff of eight and was responsible for collections, occupancy, operations, maintenance, tax credit compliance and resident relations.

ACCREDITATIONS

- Building Operator Certification from Midwest Energy Alliance
- Green Property Management Certification from Enterprise Community Partners
- Tax Credit Specialist from National Council for Housing Management

PROJECTS LIST

- Homestead Oaks – 140 units, 3226 W. Slaughter Lane. Construction completed 2015.
- Live Oak Trails – 58 units, 8500 W. Highway 71. Construction completed 2016.
- Bluebonnet Studios – 107 units, 2301 S. Lamar Blvd. Construction completed 2016.
- Lakeline Station – 128 units, 13635 Rutledge. Opening 2016.
- Cardinal Point – 120 units, 11011 ½ Four Points Drive. Opening 2017.

FOUNDATION COMMUNITIES - Board of Directors 2016

Foundation Communities (FC) has a 15 member Board of Directors. One-third of the board are current or former residents; the rest of the board is made up of leaders in the fields of education, finance, real estate, architecture, and commerce/tech. FC's Board has the following committees: Executive, Finance, Real Estate, Property, Board Development, Fundraising, and the Resident Board Committee.

COMMUNITY REPRESENTATIVES

Tom Chmielewski – Chair

VP Strategic Sales iControl Networks

DATE APPOINTED: 02/2009
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/17

Freddy Marichal – Treasurer

DATE APPOINTED: 04/2010
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/18

Jason Qunell – Past Chair

Senior Manager of Commercial Lending

DATE APPOINTED: 12/2008
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/16

Jewel Arrington

Financial Planner

DATE APPOINTED: 02/2016
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/23

Andrew Clements

Senior Architect

DATE APPOINTED: 02/2016
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/23

Adrianna Cuellar Rojas

President and CEO United Ways of Texas

DATE APPOINTED: 02/2015
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/22

Leslie Pearson – Treasurer

Certified Public Accountant

DATE APPOINTED: 08/2009
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/17

Anna Sanchez

VP Business Banking Manager

DATE APPOINTED: 12/2013
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/20

David Tandy

CEO, Gracy Title

DATE APPOINTED: 02/2012
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/19

Michelle Wallis

Executive Director Office of Innovation and Development

DATE APPOINTED: 04/2014
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/21

RESIDENT REPRESENTATIVES

Christina G. Cohee – Vice Chair

Buckingham Former Resident Community Volunteer

DATE APPOINTED: 10/2008
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/16

Alicia Wong, DDS – Secretary

Sierra Ridge Resident

DATE APPOINTED: 12/2010
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/18

Kellee Coleman – Vice Chair

M Station Resident, Trainer- Embody Transformation

DATE APPOINTED: 10/2012
CURRENT TERM EXP: 12/17
FINAL TERM EXP: 12/19

Charles DiTullio – Vice Chair

Sierra Ridge Resident, Senior Administrative Associate,

The University of Texas at Austin

DATE APPOINTED: 12/2010
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/18

Dalton Duffie

Skyline Terrace Resident, Foundation Communities-Senior Health Specialist

DATE APPOINTED: 04/2013
CURRENT TERM EXP: 12/16
FINAL TERM EXP: 12/20

Sources and Uses

Mueller Family: ESTIMATED 9% Sources Uses

Foundation Communities, Inc.

NOTE: Subject to Change - will provide update of any changes

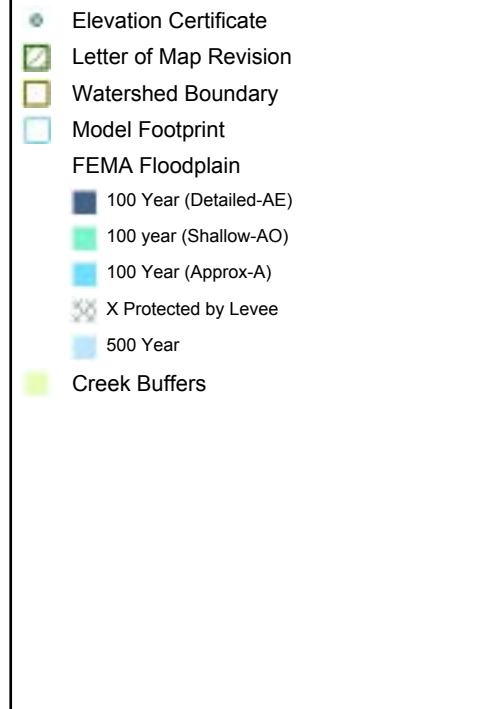
Use of Funds		Notes
Land Acquisition Costs	\$1,001,000	
Hard Construction Costs	\$17,676,725	
Work Performed by Owner	\$305,514	
Developer Fee	\$2,315,000	
Architecture & Engineering	\$691,590	
Third Party Reports and Testing	\$62,822	
Building Permits and Fees	\$20,000	
Accounting	\$10,000	
Legal	\$10,000	
Taxes and Insurance During Construction	\$134,638	
Tax Credit Fees	\$64,618	
Equity Legal Fees/Due Diligence	\$50,000	
Soft Cost Contingency	\$20,000	
Bridge Loan Interest & Fees	\$820,875	
Perm Loan Fees & Closing Costs	\$182,613	
Operating and lease-up reserves	\$450,000	
Total Uses	\$23,815,395	

Construction Sources of Funds		Status	Notes
LIHTC Equity	\$4,049,595		\$1,500,000 HTC Request
Construction Debt Financing	\$12,000,000		
City of Austin	\$4,000,000		
FC Perm Sponsor Loan	\$625,000		
Deferred Fee	\$375,800		
Total Sources During Construction	\$21,050,395		
Total Uses During Construction:	\$21,050,395		

Permanent Sources of Funds		Status	Notes
LIHTC Equity @ \$0.90/credit	\$13,498,650		\$1,500,000 HTC Request
Energy Credit Equity @ \$0.90/credit	\$0		
Supportable Mortgage Amount	\$4,753,782		assumed 6.25% rate/15 year term/30 year amo
City of Austin	\$4,000,000		
FC Sponsor Loan	\$625,000		
NeighborWorks America	\$275,000		
FHLB	\$350,000		
Deferred Fee	\$937,964		
Total Sources	\$23,815,395		

Flood Plain Map

Mueller Apts - Parcel# 0218170201



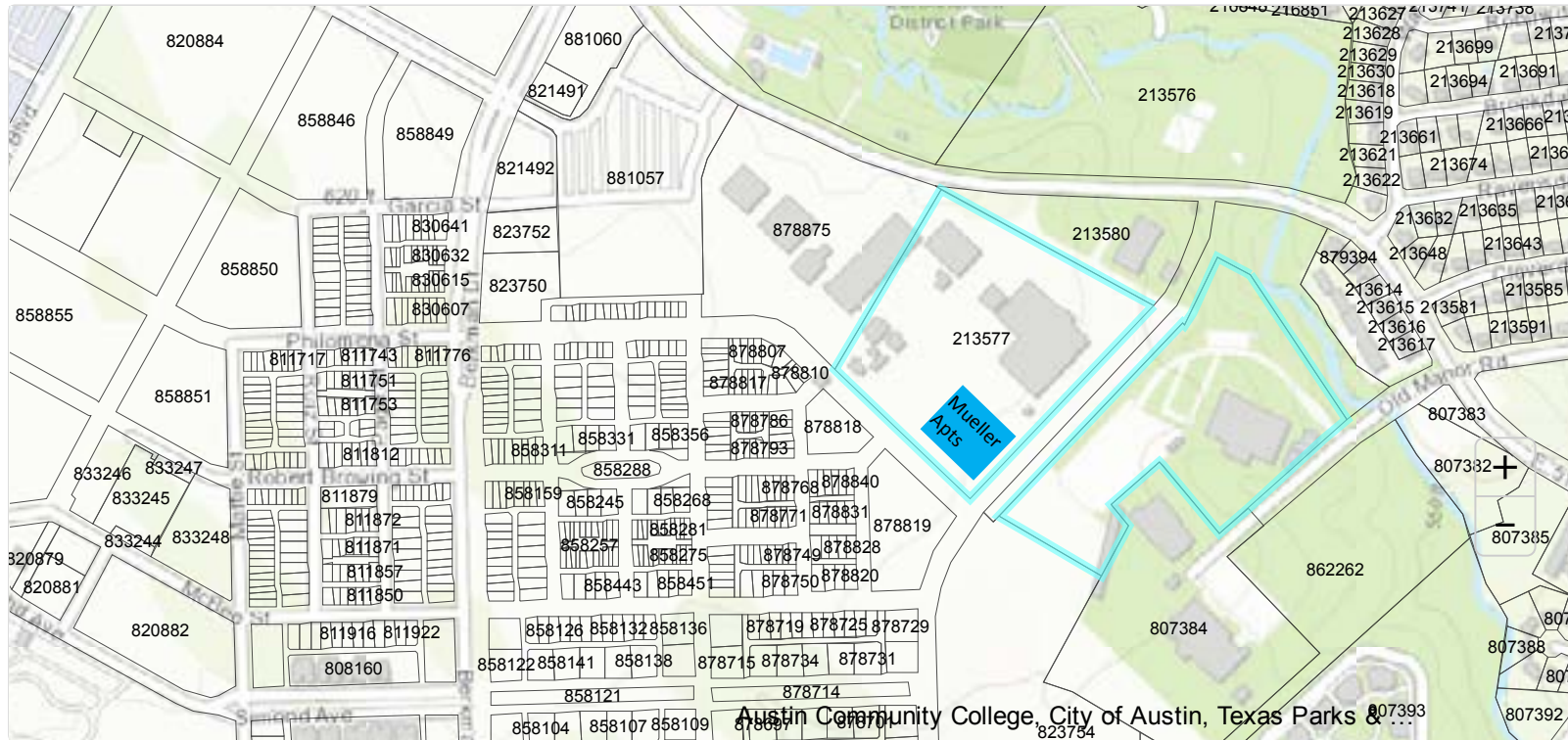
This custom map was created with FloodPro and is for informational purposes only. It is not intended for or suitable for legal, engineering, or surveying purposes. It does not represent on-the-ground survey and represents only the approximate relative locations of property boundaries. No warranty is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



Geo ID: 0218170201
Situs Address: 5010 OLD MANOR RD TX
Property Type: Real
State Code: F1

Legal	ABS 62 SUR 10 BURLESON J ABS 793 SUR 20
Description:	WARNELL H VAR SUR ACR 27.0942
Abstract:	A0062
Neighborhood:	EXEMPT PPTY W/ SQ FT
Appraised Value:	N/A
Jurisdictions:	68, 02, 0A, 2J, 03, 01, 6K

Name: CITY OF AUSTIN
Exemptions: EX-XV
DBA: AUSTIN FILM SOCIETY



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