



**December Board Meeting**

To be held at the offices of  
Texas State Affordable Housing Corporation  
6701 Shirley Avenue  
Austin, TX 78752

Wednesday, December 15, 2021  
10:30 a.m.

**TEXAS STATE AFFORDABLE HOUSING CORPORATION  
BOARD MEETING  
AGENDA**

**To be held at the offices of  
Texas State Affordable Housing Corporation  
6701 Shirley Avenue  
Austin, Texas 78752**

**December 15, 2021  
10:30 A.M.**

**CALL TO ORDER  
ROLL CALL  
CERTIFICATION OF QUORUM**

**Bill Dietz, Chair**

Pledge of Allegiance – **I pledge allegiance to the flag of the United States of America, and to the Republic for which it stands, one Nation under God, indivisible, with liberty and justice for all.**

Texas Allegiance – **Honor the Texas flag; I pledge allegiance to thee, Texas, one state under God, one and indivisible.**

The Board of Directors of Texas State Affordable Housing Corporation will meet to consider and possibly act on the following:

**PUBLIC COMMENT**

**PRESIDENT’S REPORT**

**David Long**

Tab A: Homeownership Finance Report  
Tab B: Development Finance Report  
Tab C: Quarterly Compliance and Resident Services Reports  
Tab D: Quarterly Fundraising Report  
Tab E: Monthly Financial Reports

**ACTION ITEMS IN OPEN MEETING:**

- |       |   |
|-------|---|
| Tab 1 | Presentation, Discussion and Possible Approval of Minutes of the Board Meeting held on November 17, 2021.   |
| Tab 2 | Presentation, Discussion and Possible Approval of a Resolution Authorizing the Texas State Affordable Housing Corporation to take preliminary action to carry out the financing of The Park on 14th located in Plano, Texas, including creating entities, negotiating finance documents, and filing applications to obtain debt financing and invest equity in the Project. |
| Tab 3 | Presentation, Discussion and Possible Approval of the Guidelines, Scoring Criteria and Targeted Housing Needs for the Allocation of Qualified Residential Rental Project Tax Exempt Bonds under the Multifamily Housing Private Activity Bond Program Request for Proposals and the 501(c)(3) Bond Program Policies for Calendar Year 2022.                                 |
| Tab 4 | Presentation, Discussion and Possible Approval for Publication and Public Comment of the Draft of the Texas State Affordable Housing Corporation’s 2022 Annual Action Plan.   |
| Tab 5 | Presentation and Discussion of the Texas State Affordable Housing Corporation’s Fiscal Year 2021 and 2022 Strategic Plans.  |

**CLOSED MEETING:**

Consultation with legal counsel on legal matters – Texas Government Code § 551.071

Deliberation regarding purchase, exchange, lease, or value of real property – Texas Government Code § 551.072

Deliberation regarding prospective gift or donation to the state or Texas State Affordable Housing Corporation – Texas Government Code § 551.073

Personnel Matters – Texas Government Code § 551.074

Implementation of security personnel or devices – Texas Government Code § 551.076

Other matters authorized under the Texas Government Code

**ACTION ITEMS IN OPEN MEETING:**

Action in Open Meeting on Items Discussed in Closed Executive Session

**ANNOUNCEMENTS AND CLOSING COMMENTS****ADJOURN**

*A Board member of the Corporation may participate in a Board meeting by video conference pursuant to Section 551.127 of the Texas Government Code. A quorum of the Board will meet at the Texas State Affordable Housing Corporation's headquarters located at 6701 Shirley Avenue., Austin Texas, 78752.*

*Individuals who require auxiliary aids or services for this meeting should contact Rebecca DeLeon, ADA Responsible Employee, at 512-220-1174 or Relay Texas at 1-800-735-2989 at least two days before the meeting so that the appropriate arrangements can be made.*

*Section 46.035 of the Texas Penal Code prohibits handgun licensees from carrying their handguns at government meetings such as this one. This prohibition applies to both concealed carry and open carry by handgun licensees. Handgun licensees are required by law to refrain from carrying their handguns at this meeting.*

*Texas State Affordable Housing Corporation reserves the right to recess this meeting (without adjourning) and convene at a later stated time, if and to the extent allowed by law. If Texas State Affordable Housing Corporation adjourns this meeting and reconvenes at a later time, the later meeting will be held in the same location as this meeting. Texas State Affordable Housing Corporation also reserves the right to proceed into a closed meeting during the meeting in accordance with the Open Meetings Act, Chapter 551 of the Texas Government Code. If permitted by the Open Meetings Act, Chapter 551 of the Texas Government Code, any item on this Agenda to be discussed in open meeting may also be discussed by the Board (and any other authorized persons) in closed meeting.*

# President's Report

Tab A

Homeownership Finance Report



**Homeownership Programs with Down Payment Assistance  
January 1 to September 30, 2021**

Month	Closed	# of Loans	% Total
January-21	\$ 263,196,644	1286	7.5%
February-21	\$ 237,176,153	1156	6.8%
March-21	\$ 351,278,022	1682	10.0%
April-21	\$ 360,195,749	1732	10.3%
May-21	\$ 378,964,897	1793	10.8%
June-21	\$ 466,854,077	2177	13.3%
July-21	\$ 460,327,374	2128	13.1%
August-21	\$ 498,656,284	2263	14.2%
September-21	\$ 489,055,646	2207	14.0%
<b>Totals</b>	<b>\$3,505,704,846</b>	<b>16424</b>	<b>100%</b>
Lender	Closed	# of Loans	% Total
Fairway Independent Mortgage Corporation	\$258,143,425	1270	7.4%
Everett Financial, dba Supreme Lending	\$238,079,474	1081	6.8%
Gateway Mortgage Group, a division of	\$178,292,317	870	5.1%
DHI Mortgage Company, Ltd.	\$144,818,702	594	4.1%
PrimerLending	\$139,731,435	673	4.0%
Academy Mortgage Corporation	\$119,517,400	576	3.4%
Guild Mortgage Corporation	\$107,485,863	529	3.1%
SFMC, LP dba Service First Mortgage Comp	\$105,443,528	490	3.0%
loanDepot.com LLC	\$101,455,506	471	2.9%
Amcap Mortgage, LTD	\$97,592,860	476	2.8%
Movement Mortgage, LLC	\$89,548,601	426	2.6%
Ark-La-Tex Financial (Benchmark Mtg.)	\$85,851,941	380	2.4%
Stearns Lending, LLC	\$73,016,575	297	2.1%
CMG Mortgage, Inc. dba CMG Financial	\$68,902,514	311	2.0%
Guaranteed Rate	\$68,884,036	327	2.0%
Cornerstone Home Lending, Inc.	\$65,493,250	296	1.9%
Cardinal Financial Company	\$62,223,689	291	1.8%
Security National Mortgage Company	\$61,771,555	299	1.8%
Pulte Mortgage LLC	\$58,701,746	243	1.7%
Lennar Mortgage, LLC	\$58,478,364	249	1.7%
American Pacific Mortgage Corporation	\$49,391,446	238	1.4%
Thrive Mortgage, LLC	\$49,000,197	227	1.4%
Town Square Mortgage & Investments, Inc.	\$47,503,351	237	1.4%
Wallick and Volk, Inc.	\$46,265,385	209	1.3%
Highlands Residential Mortgage	\$45,657,659	204	1.3%
SWBC Mortgage Corporation	\$39,405,234	199	1.1%
Gardner Financial Services, Ltd.	\$36,957,402	170	1.1%
Caliber Home Loans, Inc.	\$35,491,990	165	1.0%
Southwest Funding, LP	\$31,930,338	148	0.9%
Network Funding, LP	\$31,486,175	145	0.9%
Hometrust Mortgage Company	\$31,168,459	168	0.9%
First Continental Mortgage, Ltd.	\$30,641,601	108	0.9%
Nations Reliable Lending, LLC	\$25,466,549	124	0.7%
Primary Residential Mortgage, Inc.	\$24,420,785	122	0.7%
Interlinc Mortgage Services, LLC	\$23,560,838	104	0.7%
NTFN, Inc.	\$23,181,835	110	0.7%
Synergy One Lending, Inc.	\$22,870,476	111	0.7%
KBHS Home Loan, LLC	\$22,843,810	91	0.7%
Mortgage Financial Services, LLC	\$22,159,878	109	0.6%
Cherry Creek Mortgage, LLC	\$21,751,275	93	0.6%
Waterstone Mortgage Corporation	\$20,127,599	94	0.6%
Certainty Home Loans, LLC	\$19,301,866	101	0.6%
First Community Mortgage	\$18,864,137	107	0.5%
Trinity Oaks Mortgage	\$18,462,943	78	0.5%
Crosscountry Mortgage, LLC	\$17,103,556	78	0.5%
Directions Equity, LLC	\$17,086,964	88	0.5%
Independent Bank	\$17,036,009	76	0.5%
First United Bank & Trust	\$15,146,023	70	0.4%
CLM Mortgage, Inc.	\$14,472,473	57	0.4%
Mid America Mortgage, Inc.	\$13,632,722	63	0.4%
Willow Bend Mortgage Company, LLC	\$13,185,880	63	0.4%
First Bank	\$13,049,436	54	0.4%
Inspire Home Loans, Inc.	\$12,657,523	55	0.4%

At a Glance	
Average Annual Income	\$62,330
Average Purchase Price	\$218,376
Average Loan Amount	\$213,450
Average Household Size	2
Average Interest Rate	3.580%
Program	%
<b>Home Sweet Texas</b>	<b>85.38%</b>
<b>Homes for Texas Heroes</b>	<b>14.62%</b>
Active Military	0.97%
Allied Health Faculty	0.15%
Corrections Officer	0.67%
County Jailer	0.13%
EMS Personnel	0.32%
Fire Fighter	0.66%
Peace Officer	1.08%
Professional Nurse Faculty	0.93%
Public Security Officer	0.26%
School Counselor	0.12%
School Librarian	0.01%
School Nurse	0.02%
Teacher	7.24%
Teacher Aide	0.21%
Veteran	1.86%
New/Existing Home	
Existing	71.99%
New	28.01%
Type of Loan	
Conventional - Purchase	17.02%
FHA - Purchase	77.23%
USDA-RHS Purchase	1.38%
VA - Purchase	4.37%
Ethnicity	
American Indian/Alaskan Native	0.27%
Asian/Pacific Islander	1.28%
Black	13.23%
Hispanic	40.08%
Not Defined	7.07%
Other	4.56%
White	33.51%
Top 20 Originating Counties*	# Households
Harris	2424
Tarrant	1693
Bexar	1610
Dallas	1273
Denton	469
Montgomery	427
Kaufman	424
El Paso	416
Bell	406
Collin	403
Williamson	343
Fort Bend	336
Ellis	267
Johnson	243
Lubbock	233
Galveston	232
Brazoria	231
Travis	231
Ector	230
Midland	228
*Top 20 of all counties statewide. All remaining counties served 4305 households.	



**Homeownership Programs with Down Payment Assistance  
January 1 to September 30, 2021**

City First Mortgage Services, LLC	\$12,183,814	59	0.3%
Panorama Mortgage Group, LLC	\$12,091,505	58	0.3%
Republic State Mortgage Co.	\$11,445,623	47	0.3%
LeaderOne Financial	\$11,421,332	58	0.3%
Legacy Mortgage, LLC	\$11,333,615	69	0.3%
Infinity Mortgage Holdings, LLC	\$11,029,092	59	0.3%
DAS Acquisition Company, LLC	\$11,010,461	43	0.3%
Sente Mortgage Inc.	\$10,686,683	51	0.3%
First National Bank Mortgage	\$10,283,401	58	0.3%
Homeside Financial	\$10,217,820	46	0.3%
Summit Funding, Inc.	\$10,141,171	43	0.3%
Southwest Bank	\$9,660,724	52	0.3%
BancorpSouth Bank	\$9,489,246	46	0.3%
Prosperity Home Mortgage, LLC	\$9,360,107	43	0.3%
First Bank & Trust	\$9,272,394	54	0.3%
American Neighborhood Mortgage	\$9,167,301	42	0.3%
Texas Bank Mortgage Company	\$9,068,631	45	0.3%
FBC Mortgage LLC	\$8,928,155	43	0.3%
Patriot Mortgage Company	\$8,745,006	50	0.2%
Finance Home America	\$8,616,390	41	0.2%
First Financial Bank, N.A.	\$8,359,704	56	0.2%
Envoy Mortgage	\$7,824,767	37	0.2%
Texas Tech Federal Credit Union	\$7,735,276	50	0.2%
M/I Financial, LLC	\$7,600,580	30	0.2%
American Financial Network, Inc.	\$7,252,482	34	0.2%
Loan Simple, Inc.	\$7,030,662	31	0.2%
Churchill Mortgage Corporation	\$6,763,774	30	0.2%
Lend Smart Mortgage, LLC	\$6,760,559	28	0.2%
HomeBridge Financial Services	\$6,681,948	32	0.2%
Bank of England	\$6,662,996	31	0.2%
Hometown Lenders, Inc.	\$6,602,925	30	0.2%
Happy State Bank	\$6,312,225	40	0.2%
America's Choice Home Loans, LP	\$6,253,590	30	0.2%
Geneva Financial, LLC	\$6,142,435	27	0.2%
InterCap Lending, Inc.	\$5,743,237	26	0.2%
Change Lending, LLC	\$5,511,914	30	0.2%
Pilgrim Mortgage, LLC	\$4,956,024	24	0.1%
Nations Lending Corporation	\$4,782,633	25	0.1%
Amerifirst Financial, Inc.	\$4,704,758	21	0.1%
Moria Development/Peoples Mortgage Co	\$4,675,790	22	0.1%
T2 Financial dba Revolution Mortgage	\$4,299,462	18	0.1%
Mortgage Solutions of Colorado, LLC	\$4,201,503	16	0.1%
New American Funding (Broker Solutions)	\$4,133,012	23	0.1%
City Bank Mortgage	\$4,070,157	21	0.1%
Home Financing Unlimited, Inc.(Mission)	\$4,023,277	14	0.1%
Rocky Mountain Mortgage Company	\$3,947,934	23	0.1%
Associated Mortgage Corporation	\$3,792,255	23	0.1%
Origin Bank	\$3,713,558	17	0.1%
Hancock Mortgage Partners, LLC	\$3,580,456	16	0.1%
K Hovnanian American Mortgage, LLC	\$3,578,341	14	0.1%
First Home Bank	\$3,518,053	17	0.1%
Goldwater Bank, N.A.	\$3,489,999	16	0.1%
Midwest Mortgage Associates Corp.	\$3,394,301	15	0.1%
LHM Financial Corp., dba CNN Mortgage	\$3,387,875	15	0.1%
Planet Home Lending, LLC	\$3,201,210	15	0.1%
Open Mortgage LLC	\$3,124,913	15	0.1%
Sun West Mortgage Company, Inc.	\$3,068,938	15	0.1%
Efinity Financial Inc.	\$3,055,843	13	0.1%
Cadence Lending Group, Inc.	\$2,873,916	17	0.1%
University Federal Credit Union	\$2,687,692	11	0.1%
Assurance Financial Group, LLC	\$2,607,396	12	0.1%
Guaranteed Rate Affinity, LLC	\$2,514,231	13	0.1%
Michigan Mutual, Inc.	\$2,358,357	9	0.1%
V.I.P. Independent Mortgage, Inc.	\$2,177,681	10	0.1%



**Homeownership Programs with Down Payment Assistance  
January 1 to September 30, 2021**

1st Preference Mortgage Corporation	\$2,151,702	10	0.1%
First Centennial Mortgage Corporation	\$2,054,306	11	0.1%
Paramount Residential Mortgage Group	\$1,939,015	9	0.1%
Guardian Mortgage	\$1,917,523	9	0.1%
Finance of America Mortgage, LLC	\$1,887,141	9	0.1%
Homevantage Mortgage	\$1,877,697	9	0.1%
Union Home Mortgage	\$1,837,009	9	0.1%
Jefferson Bank	\$1,757,227	10	0.1%
Bay Equity LLC	\$1,544,367	7	0.0%
First State Bank	\$1,538,000	8	0.0%
Residential Bancorp, Inc.	\$1,412,953	9	0.0%
FFC Mortgage Corp. dba Home 123 Mortgage	\$1,326,447	6	0.0%
First Community Mortgage, Inc	\$1,310,470	7	0.0%
International Bank of Commerce	\$1,281,002	6	0.0%
LOANPEOPLE, LLC	\$1,021,460	4	0.0%
Amarillo National Bank	\$970,101	6	0.0%
University Lending Group, LLC	\$903,725	6	0.0%
Victorian Finance LLC	\$821,739	5	0.0%
Great Western Financial Services, Inc.	\$799,255	3	0.0%
Peoples Bank	\$730,006	5	0.0%
Canopy Mortgage, LLC	\$679,498	3	0.0%
The Mortgage Firm, Inc.	\$581,923	2	0.0%
Axia Financial, LLC	\$513,699	2	0.0%
Gibraltar Mortgage Services, LLC	\$462,311	2	0.0%
Community National Bank	\$453,499	2	0.0%
Colonial Savings, F.A.	\$452,892	2	0.0%
Central Bank	\$432,850	2	0.0%
Mortgage300 Corp.	\$426,725	3	0.0%
US Mortgage of Florida	\$425,156	2	0.0%
Encompass Lending Group, LP	\$395,015	2	0.0%
Draper and Kramer Mortgage Corporation	\$381,928	2	0.0%
First Horizon Bank	\$353,479	2	0.0%
LendUS, LLC	\$338,750	2	0.0%
Mann Mortgage, LLC	\$333,263	2	0.0%
Homeowners Financial Group USA, LLC	\$315,250	1	0.0%
Castle and Cooke Mortgage	\$314,204	1	0.0%
CalCon Mutual Mortgage LLC	\$300,700	2	0.0%
The Federal Savings Bank	\$287,201	1	0.0%
NFM, INC.	\$216,015	1	0.0%
Capstar Lending, LLC	\$203,700	1	0.0%
BM REAL ESTATE SERVICES, INC.	\$200,785	1	0.0%
Citywide Home Loans, a Utah Corporation	\$194,413	1	0.0%
American Nationwide Mortgage Company	\$145,500	1	0.0%
tsahc	\$100,000	1	0.0%
Wells Fargo Bank, N.A.	\$89,240	1	0.0%
<b>Grand Total</b>	<b>\$3,505,704,846</b>	<b>16424</b>	<b>100%</b>





**Mortgage Credit Certificate Program  
January 1 to September 30, 2021**

Month	Closed	# of Loans	% Total
Jan	\$ 30,928,529	151	7%
Feb	\$ 33,295,886	160	7%
Mar	\$ 46,892,086	216	10%
Apr	\$ 49,402,346	229	11%
May	\$ 55,105,725	257	12%
Jun	\$ 64,431,899	305	14%
Jul	\$ 56,651,307	257	12%
Aug	\$ 61,585,984	277	13%
Sep	\$ 60,612,891	272	13%
<b>Totals</b>	<b>\$458,906,653</b>	<b>2124</b>	<b>100%</b>
Lender	Closed	# of Loans	% Total
Everett Financial, dba Supreme Lending	\$37,436,130	164	7.7%
Fairway Independent Mortgage Corporation	\$29,086,669	143	6.7%
Gateway Mortgage Group, a division of	\$27,258,878	128	6.0%
Stearns Lending, LLC	\$20,800,812	85	4.0%
PrimeLending	\$20,707,128	94	4.4%
Amcap Mortgage, LTD	\$17,199,593	83	3.9%
Guild Mortgage Corporation	\$15,512,251	77	3.6%
Pulte Mortgage LLC	\$14,881,535	63	3.0%
Guaranteed Rate	\$14,200,207	70	3.3%
DHI Mortgage Company, Ltd.	\$13,067,622	54	2.5%
Movement Mortgage, LLC	\$12,307,906	59	2.8%
Academy Mortgage Corporation	\$11,703,600	57	2.7%
Cardinal Financial Company	\$11,379,007	51	2.4%
SFMC, LP dba Service First Mortgage Comp	\$10,889,194	52	2.4%
Crosscountry Mortgage, LLC	\$9,747,496	48	2.3%
CMG Mortgage, Inc. dba CMG Financial	\$9,652,391	45	2.1%
loanDepot.com LLC	\$9,649,333	43	2.0%
Ark-La-Tex Financial (Benchmark Mtg.)	\$9,120,546	40	1.9%
Hometrust Mortgage Company	\$7,921,478	43	2.0%
First Continental Mortgage, Ltd.	\$7,793,858	28	1.3%
Thrive Mortgage, LLC	\$6,823,455	30	1.4%
Highlands Residential Mortgage	\$6,786,325	32	1.5%
Security National Mortgage Company	\$5,359,025	26	1.2%
Synergy One Lending, Inc.	\$5,119,511	25	1.2%
KBHS Home Loan, LLC	\$5,020,677	19	0.9%
Nations Reliable Lending, LLC	\$4,609,373	24	1.1%
Interlinc Mortgage Services, LLC	\$4,597,750	21	1.0%
Wallick and Volk, Inc.	\$4,277,031	20	0.9%
Caliber Home Loans, Inc.	\$4,089,132	19	0.9%
BancorpSouth Bank	\$3,716,208	18	0.8%
Town Square Mortgage & Investments, Inc.	\$3,637,209	19	0.9%
Texas Bank Mortgage Company	\$3,495,515	18	0.8%
Southwest Funding, LP	\$3,407,121	16	0.8%
American Pacific Mortgage Corporation	\$3,394,246	16	0.8%
Summit Funding, Inc.	\$3,364,495	14	0.7%
Mid America Mortgage, Inc.	\$3,324,668	16	0.8%
University Federal Credit Union	\$3,281,499	13	0.6%
Paramount Residential Mortgage Group	\$2,972,693	11	0.5%
Lennar Mortgage, LLC	\$2,870,339	13	0.6%
Inspire Home Loans, Inc.	\$2,797,764	12	0.6%
CLM Mortgage, Inc.	\$2,757,135	11	0.5%
Primary Residential Mortgage, Inc.	\$2,742,408	13	0.6%
1st Preference Mortgage Corporation	\$2,684,025	13	0.6%
American Neighborhood Mortgage	\$2,571,896	12	0.6%
Sente Mortgage Inc.	\$2,561,673	12	0.6%
America's Choice Home Loans, LP	\$2,399,932	10	0.5%
Bank of America, N.A.	\$2,389,435	12	0.6%
Gardner Financial Services, Ltd.	\$2,353,031	12	0.6%
Network Funding, LP	\$2,343,464	11	0.5%
SWBC Mortgage Corporation	\$2,170,223	11	0.5%
Republic State Mortgage Co.	\$1,679,384	7	0.3%
American Financial Network, Inc.	\$1,450,316	8	0.4%
Waterstone Mortgage Corporation	\$1,425,774	6	0.3%

At a Glance	
Total Amount Originated	\$458,906,653
Average Annual Income	\$58,853
Average Purchase Price	\$222,570
Average Loan Amount	\$216,058
Average Household Size	2
Average Interest Rate	3.488%
Program	%
Home Sweet Texas	84.13%
Homes for Texas Heroes	15.87%
Active Military	0.33%
Allied Health Faculty	0.00%
Corrections Officer	0.71%
County Jailer	0.09%
EMS Personnel	0.38%
Fire Fighter	0.71%
Peace Officer	1.08%
Professional Nurse Faculty	0.75%
Public Security Officer	0.28%
School Counselor	0.09%
School Librarian	0.00%
School Nurse	0.00%
Teacher	9.51%
Teacher Aide	0.33%
Veteran	1.60%
New/Existing Home	
Existing	68.55%
New	31.45%
Type of Loan	
Conventional - Purchase	25.71%
FHA - Purchase	68.60%
USDA-RHS Purchase	3.58%
VA - Purchase	2.12%
Ethnicity	
American Indian/Alaskan Native	0.26%
Asian/Pac Isle	3.95%
Black	15.09%
Hispanic	35.51%
Not Defined	7.43%
Other	7.92%
White	29.83%
Top 20 Originating Counties*	# of Loans
Harris	387
Tarrant	254
Bexar	204
Dallas	155
Williamson	108
Travis	85
Denton	74
Kaufman	67
Montgomery	63
Hays	53
Collin	46
Fort Bend	45
Galveston	35
El Paso	33
Bell	30
Brazoria	27
Hidalgo	26
Johnson	25
Nueces	25
Ellis	25

\*Top 20 of all counties statewide. All remaining counties served 357 households.



T E X A S  
State Affordable Housing Corporation

**Mortgage Credit Certificate Program  
January 1 to September 30, 2021**

Trinity Oaks Mortgage	\$1,368,748	6	0.3%
NTFN, Inc.	\$1,310,859	6	0.3%
Certainty Home Loans, LLC	\$1,309,280	7	0.3%
Panorama Mortgage Group, LLC	\$1,277,198	6	0.3%
First Bank & Trust	\$1,265,453	9	0.4%
Homeside Financial	\$1,159,073	5	0.2%
Nations Lending Corporation	\$1,042,202	5	0.2%
DAS Acquisition Company, LLC	\$1,039,087	5	0.2%
Barton Creek Lending Group	\$1,007,210	4	0.2%
AML Funding, LLC	\$971,250	4	0.2%
Bank of England	\$955,790	4	0.2%
Envoy Mortgage	\$947,472	5	0.2%
Hometown Lenders, Inc.	\$903,173	4	0.2%
Geneva Financial, LLC	\$880,158	4	0.2%
Cornerstone Home Lending, Inc.	\$863,420	4	0.2%
Change Lending, LLC	\$813,684	5	0.2%
First National Bank Mortgage	\$811,805	3	0.1%
New American Funding (Broker Solutions)	\$802,201	4	0.2%
Open Mortgage LLC	\$792,744	4	0.2%
First Centennial Mortgage Corporation	\$773,158	5	0.2%
Associated Mortgage Corporation	\$741,320	6	0.3%
LeaderOne Financial	\$736,058	4	0.2%
Moria Development/Peoples Mortgage Co	\$675,375	3	0.1%
Sun West Mortgage Company, Inc.	\$661,314	3	0.1%
Home Financing Unlimited, Inc.(Mission)	\$603,216	2	0.1%
Brazos National Bank	\$589,390	2	0.1%
Guaranteed Rate Affinity, LLC	\$560,539	3	0.1%
InterCap Lending, Inc.	\$535,806	2	0.1%
Willow Bend Mortgage Company, LLC	\$497,346	3	0.1%
LHM Financial Corp., dba CNN Mortgage	\$486,033	2	0.1%
City First Mortgage Services, LLC	\$480,097	2	0.1%
Finance of America Mortgage, LLC	\$434,484	2	0.1%
Colonial Savings, F.A.	\$431,125	2	0.1%
Assurance Financial Group, LLC	\$400,810	2	0.1%
Jefferson Bank	\$392,848	3	0.1%
Mortgage Financial Services, LLC	\$385,291	2	0.1%
First State Bank	\$377,465	2	0.1%
Directions Equity, LLC	\$376,678	2	0.1%
Amerifirst Financial, Inc.	\$365,653	2	0.1%
Homevantage Mortgage	\$353,517	2	0.1%
Mann Mortgage, LLC	\$333,263	2	0.1%
Castle and Cooke Mortgage	\$314,204	1	0.0%
Taylor Morrison Home Funding, Inc.	\$306,297	1	0.0%
Draper and Kramer Mortgage Corporation	\$299,250	1	0.0%
Happy State Bank	\$271,982	1	0.0%
M/I Financial, LLC	\$268,707	1	0.0%
The Mortgage Firm, Inc.	\$253,993	1	0.0%
Midwest Mortgage Associates Corp.	\$237,553	1	0.0%
First Bank	\$236,634	1	0.0%
Encompass Lending Group, LP	\$231,198	1	0.0%
Independent Bank	\$228,990	1	0.0%
LOANPEOPLE, LLC	\$218,250	1	0.0%
NFM, INC.	\$216,015	1	0.0%
Goldwater Bank, N.A.	\$208,160	1	0.0%
BM REAL ESTATE SERVICES, INC.	\$200,785	1	0.0%
K&G Capital Mortgage, LLC	\$199,687	1	0.0%
HomeBridge Financial Services	\$196,377	1	0.0%
Origin Bank	\$196,278	1	0.0%
Planet Home Lending, LLC	\$194,413	1	0.0%
City Bank Mortgage	\$191,468	1	0.0%
Loan Simple, Inc.	\$180,456	1	0.0%
Mortgage Solutions LP	\$179,450	1	0.0%
First Community Mortgage	\$162,993	1	0.0%
American Nationwide Mortgage Company	\$145,500	1	0.0%
Roberson Mortgage Inc.	\$145,319	1	0.0%



T E X A S  
State Affordable Housing Corporation

**Mortgage Credit Certificate Program**  
**January 1 to September 30, 2021**

Amarillo National Bank	\$122,735	1	0.0%
<b>Total Committed</b>	<b>\$458,906,653</b>	<b>2124</b>	<b>100%</b>

Tab B

Development Finance Report

# Texas State Affordable Housing Corporation

## Development Finance Programs Report

### **Affordable Communities of Texas Program (ACT)**

This month staff will be asking for the Board's consideration a resolution authorizing staff to take preliminary action to carry out the financing of the Park on 14<sup>th</sup>, to be located at TSAHC's ACT Land Trust property in Plano. The Park on 14<sup>th</sup> will include 62 multi-family units, targeted to families and individuals, that include one- and two-bedroom units in a single, 4-story, residential building with surface parking. The Park on 14<sup>th</sup> will benefit from close proximity to downtown Plano, the Downtown Plano DART Rail Station, Haggard Park, and multiple restaurants and retail stores.

Staff is also moving forward with the redevelopment of its vacant lot in Greenville. The City of Greenville approved a replat of our lot that created three separate lots intended for affordable homeownership targeted to families earning up to 80% of the area median income. Our builder, KH Solutions, is finalizing building plans for permitting and construction budgets are under review.

Here is a summary of the past month's portfolio activity:

Program	Portfolio as of November 1, 2021	Transferred	Sold	Portfolio as of December 1, 2021	Current Portfolio Value
ACT Land Bank	17		1	16	\$136,631.60
ACT Land Trust	1			1	\$650,000.00
Totals	18			17	\$786,631.60

Our current pipeline report:

- 1 property under contract
- 6 properties listed for sale
- 5 homes under construction
- 2 properties leased to Local Partner
- 2 properties in predevelopment
- 1 property searching for a Local Partner

### **Texas Housing Impact Fund**

In November, staff closed on the renewal of a revolving line of credit to Legacy CDC, in the amount of \$600,000, as approved at the October board meeting. Legacy CDC has already added four properties to their line of credit with construction activity initiated.

Staff is working to close two loans that will provide bridge financing to apartment projects Kiva East in Dallas and June West in Austin. Both projects have received 9% housing tax credit awards in 2021 and are being developed by Saigebrook Development, LLC. The Board approved these loans in October. Loan closings are anticipated by the end of December.

Lastly, staff is closing on a \$375,000 AHP loan related to Embree Eastside Apartments in Dallas, by mid-December. Loan committee approved this loan in July 2021.

# Texas State Affordable Housing Corporation

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## Development Finance Programs Report

### **Multifamily Bond Program**

On November 18, the Sandpiper Cove Apartments project was voted on and approved by the Texas Bond Review Board - the final step in the bond approval process. The development and finance teams are now checking off the final due diligence items and anticipate closing the transaction in early January.

Staff also received three new bond applications in November. The La Vista de Lopez project, located in East Austin, is a 27-unit high rise apartment complex targeting seniors. Due to the enormous demand for private activity bond volume cap last year, the project has struggled to find an issuer that could dedicate the necessary bonds. TSAHC's estimated 2022 allocation is expected to increase based on updated population figures and staff will be looking to induce and reserve bonds for this application in January 2022.

Two additional applications were submitted in November. The Juniper Creek Apartments in Austin will include 130 units, with 20% of units targeting persons who are formerly homeless. The developer, Foundation Communities, has a strong track record of housing development and management. The second application was submitted by National Church Residences for the Eden Court Apartments. The project involves two existing affordable apartments located in Seguin. One property is also targeted to serving seniors.

Tab C

Quarterly Compliance and  
Residential Services Reports

## Quarterly Compliance Status for TSAHC

As of the 3rd Quarter Ending September 30, 2021

### Set-Aside Requirements

#### DALCOR

	Pine Club (Beaumont)	Ridgewood (Huntsville)	Saddlewood Club (Bryan)
40% of units at 60% AMI	100.0%	100.0%	100.0%
Remaining units at 80% AMI	100.0%	100.0%	100.0%
Total Affordable Units (40% Required)	100.0%	100.0%	100.0%

#### Tealwood Club (Wichita Falls) Willowgreen (Houston) Woodglen Park (Dallas)

40% of units at 60% AMI	100.0%	99.7%	99.6%
Remaining units at 80% AMI	100.0%	100.0%	100.0%
Total Affordable Units (40% Required)	100.0%	100.0%	100.0%

#### Commonwealth

#### Cesar Chavez Foundation

	White Rock (San Antonio)	Aguila Oaks (San Antonio)
20% of units at 50% AMI	20.8%	22.8%
75% of units at 80% AMI	81.3%	79.2%
Total Affordable Units (75% Required)	81.3%	79.2%

#### Odyssey Properties

#### DHI Woodside

	Marshall Meadows (San Antonio)	Woodside Village (Palestine)
40% of units at 60% AMI	51.6%	98.9%
Total Affordable Units (40% Required)	51.6%	98.9%

#### GESC

#### Mary Lee Foundation

	Rita Blanca (Dalhart)	The Willows (Austin)
20% of units at 50% AMI	21.4%	90.6%
100% of units at 80% AMI	100%	98.4%
Total Affordable Units (100% Required)	100%	98.4%

#### Texas Housing Foundation

#### Palladium Glenn Heights (Glenn Heig Gateway Northwest (Georgetown))

40% of units at 60% AMI	93.0%	97.2%
Total Affordable Units (40% Required)	93.0%	97.2%

#### Palladium Midland (Midland)

40% of units at 60% AMI	78.8%
78% of units at 80% AMI	78.8%
Total Affordable Units (78% Required)	78.8%

#### Steele

	Peoples El Shaddai (Dallas)	St James Manor (Dallas)	Brooks Manor (West Columbia)
5% of units at 30% AMI	22.0%	18.0%	10%
40% of units at 60% AMI	100.0%	100.0%	100%
Total Affordable Units (40% Required)	100.0%	100.0%	100%

#### Pythian Manor (Dallas)

5% of units at 30% AMI	11.8%
40% of units at 60% AMI	97.4%
Total Affordable Units (40% Required)	97.4%



Rainbow			
	Chaparral Village (Odessa)	Cove Village (Copperas Cove)	El Nido (El Paso)
100% of units at 60% AMI	100.0%	100.0%	100.0%
Total Affordable Units (100% Required)	100.0%	100.0%	100.0%
	Garden (Lubbock)	High Plains (Lubbock)	Jose Antonio Escajeda (El Paso)
100% of units at 60% AMI	100.0%	100.0%	100.0%
Total Affordable Units (100% Required)	100.0%	100.0%	100.0%
	Los Ebanos (Brownsville)	River Park (Lampasas)	Peppertree (Fort Worth)
100% of units at 60% AMI	100.0%	100.0%	100.0%
Total Affordable Units (100% Required)	100.0%	100.0%	100.0%
	Salem Village (Victoria)	Sierra Vista (El Paso)	Spring Terrace (Amarillo)
100% of units at 60% AMI	100.0%	100.0%	100%
Total Affordable Units (100% Required)	100.0%	100.0%	100.0%
	Win-Lin Village (Amarillo)		
100% of units at 60% AMI	100.0%		
Total Affordable Units (100% Required)	100.0%		
Hamilton Valley			
	Brush County Cottages (Dilley)	Chula Vista (San Diego)	Cielo Lindo Apartments (Edcouch)
40% of units at 60% AMI	100.0%	97.7%	97.1%
Total Affordable Units (100% Required)	100.0%	97.7%	97.1%
	La Estancia (Sebastian)	La Posada Apartments (Elsa)	La Reina (La Villa)
40% of units at 60% AMI	96.9%	100.0%	100.0%
Total Affordable Units (100% Required)	96.9%	100.0%	100.0%
	La Sombra (Donna)	Las Palmas Apartments (La Feria)	Leuty Avenue Apartments (Justin)
40% of units at 60% AMI	100.0%	97.2%	100.0%
Total Affordable Units (100% Required)	100.0%	97.2%	100.0%
	Los Naranjos (Alton)	Oak Haven (Donna)	Raintree Apartments (Alamo)
40% of units at 60% AMI	96.7%	100.0%	100%
Total Affordable Units (100% Required)	96.7%	100.0%	100.0%
	Seagraves Garden Apts (Seagraves)	Silver Trail (Menard)	The Village Apartments (Tomball)
40% of units at 60% AMI	100.0%	100.0%	100.0%
Total Affordable Units (100% Required)	100.0%	100.0%	100.0%
	Valley View Apartments (Valley View)	Villa Vallarta (Rio Grande City)	Vista Verde (Cotulla)
40% of units at 60% AMI	100.0%	100.0%	100.0%
Total Affordable Units (100% Required)	100.0%	100.0%	100.0%
	Willowick Apartments (Gainesville)	Windmill Apartments (Giddings)	Windwood (Kingsland)
40% of units at 60% AMI	100.0%	100.0%	98.5%
Total Affordable Units (100% Required)	100.0%	100.0%	98.5%
	LIH Walnut Creek Austin LP	AHA!	
	Walnut Creek (Austin)	AHA! At Briarcliff Apartments (Austin)	
40% of units at 60% AMI	98.0%	96.3%	
Total Affordable Units (40% Required)	98.0%	96.3%	
Notes: The Willows did not meet their set-aside requirements due to two pending evictions. Management is aware to occupy the units with program eligible households when they become available.			

TSAHC - Quarterly Resident Services Summary				
As of the 3rd Quarter Ending September 30, 2021				
DALCOR				
	Pine Club (Beaumont)	Ridgewood (Huntsville)	Saddlewood Club (Bryan)	
Number of Services Required	6	6	6	
Number of Services Provided	13	13	14	
	Tealwood Club (Wichita Falls)	Willowgreen (Houston)	Woodglen Park I & II (Dallas)	
Number of Services Required	6	6	6	
Number of Services Provided	15	16	13	
	AHA!	Cesar Chavez Foundation	GESC	Texas Housing Foundation
	AHA! At Briarcliff Apartments (Austin)	Aguila Oaks (San Antonio)	Rita Blanca (Dalhart)	Palladium Midland (Midland)
Number of Services Required	12	6	5	6
Number of Services Provided	4	10	6	9
	Odyssey Properties	Mary Lee Foundation	Texas Housing Foundation	Texas Housing Foundation
	Marshall Meadows (San Antonio)	The Willows (Austin)	Gateway Northwest (Georgetown)	Palladium Glenn Heights (Dallas)
Number of Services Required	6	5	6	6
Number of Services Provided	0	21	0	16
	Steele St. James Peoples	Steele St. James Peoples	Steele Brooks Manor	Steele Pythian Manor
	Peoples El Shaddai (Dallas)	St James Manor (Dallas)	Brook Manor (West Columbia)	Pythian Manor (Dallas)
Number of Services Required	12	12	6	12
Number of Services Provided	3	3	8	3
	LIH Walnut Creek Austin LP	DHI Woodside Associates, LLC	LRC Shady Oaks Manor, LLC	THF Midland Leased Housing
	Walnut Creek (Austin)	Woodside Village (Palestine)	Shady Oaks	Ventura at Tradewinds (Midland)
Number of Services Required	12	6	6	12
Number of Services Provided	14	5	0	N/A - New Construction
Rainbow Housing				
	Chaparral Village (Odessa)	Cove Village (Copperas Cove)	El Nido (El Paso)	Garden Apartments (Lubbock)
Number of Services Required	5	5	5	5
Number of Services Provided	23	12	17	15
	High Plains (Lubbock)	Jose Antonio Escajeda (El Paso)	Los Ebanos (Brownsville)	Peppertree (Fort Worth)
Number of Services Required	5	5	5	5
Number of Services Provided	17	15	17	19
	River Park (Lampasas)	Salem Village (Victoria)	Sierra Vista (El Paso)	Spring Terrace (Amarillo)
Number of Services Required	5	5	5	5
Number of Services Provided	13	17	19	17
	Win-Lin Village (Amarillo)			
Number of Services Required	5			
Number of Services Provided	15			
Hamilton Valley				
	Brush Country Cottages (Dilley)	Chula Vista (San Diego)	Cielo Lindo Apartments (Edcouch)	La Estancia (Sebastian)
Number of Services Required	12	12	12	12
Number of Services Provided	12	12	12	12
	La Posada Apartments (Elsa)	La Reina Apartments (La Villa)	La Sombra (Donna)	Las Palmas Apartments (La Feria)
Number of Services Required	12	12	12	12
Number of Services Provided	14	13	12	12
	Leuty Avenue Apartments (Justin)	Los Naranjos (Alton)	Oak Haven Apartments (Donna)	Raintree Apartments (Alamo)
Number of Services Required	12	12	12	12
Number of Services Provided	12	12	12	14
	Seagraves Garden Apartments (Seagraves)	Silver Trail (Menard)	The Village (Tomball)	Valley View Apartments (Valley View)
Number of Services Required	12	12	12	12
Number of Services Provided	16	8	12	12
	Villa Vallarta (Rio Grande City)	Vista Verde (Cotulla)	Willowick Apartments (Gainesville)	Windmill Apartments (Giddings)
Number of Services Required	12	12	12	12
Number of Services Provided	5	11	11	10
	Windwood (Kingsland)			
Number of Services Required	12			
Number of Services Provided	9			
<b>Notes:</b> On March 17, 2020, TSAHC suspended resident services that involve crowds of more than 10 people due to the COVID-19 pandemic. The suspension is in effort to maintain proper social distances during the pandemic. This resulted in less services provided than required for many developments. Developments providing less than the required amount of services will not be considered out of compliance. The suspension is in effect until October 1, 2021. Shady Oaks Manor is undergoing rehabilitation therefore no services have been provided.				

July Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Aguila Oaks	After School Program	The afterschool program opened up in limited capacity for the s	Cesar Chavez Foundation	5	7/12/2021	2
	Library Use	The library services were available to residents. Residents were	Cesar Chavez Foundation	5	7/1/2021	1
	Medical & Health Services	Alternative services were provided to assist resident. Residents	Cesar Chavez Foundation	11	7/3/2021	1
AHA! At Briarcliff Apartment	Presentation	Myles Wallace of Peak Performers will be presenting July 22, 20	Peak Performers	0	7/22/2021	1
Brooks Manor	Food Pantry	Food Pantry	Place of Grace	28	7/8/2021	1
	Community Luncheon	Community Luncheon	Brooks Manor	8	7/15/2021	1
	Notary Services	Notary Services	Brooks Manor	0	7/12/2021	1
Brush Country Cottages	On Site Library	Free and available fir residents during business hours.	Hamilton Valley Management	2	7/1/2021	1
	Business Center	Free and available fir residents during business hours. Services	Hamilton Valley Management	1	7/1/2021	1
	Community Garden	Residents are able to use the garden anytime. The manager had	Hamilton Valley Management	3	7/15/2021	1
	Exercise Class	Twice monthly Exercise class. 7/5 and 7/22 this month.	H and Exercise	2	7/5/2021	1
Chaparral Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	7/5/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	7/6/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	7/13/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	7/22/2021	1
	Direct Support	GED	RHAC	1	7/30/2021	1
Chula Vista	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Community Garden	Free and available to all residents 24/7	Hamilton Valley Management	3	7/1/2021	1
	Fire Safety	Now that the rehab is slowly finishing up we scheduled with the	San Diego FD	0	7/22/2021	1
	Health Screening	Now that the rehab is slowly finishing up we scheduled with Me	Med Team	0	7/29/2021	1
Cielo Lindo Apartments	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	2	7/1/2021	1
	Business Center	Free and available to residents during business hours. Services	Hamilton Valley Management	3	7/1/2021	1
	Free Transportation Tickets	Free and available to residents during business hours. The ticket	Valley Metro	3	7/1/2021	1
	Community Garden	Free and available to residents 24.7.	Hamilton Valley Management	2	7/1/2021	1
Cove Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/5/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/13/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/22/2021	1
	Direct Support	Job Search- Immediate Workforce Program	RHAC	1	7/30/2021	1
El Nido Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	7/5/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	7/13/2021	1
	Community Awareness	Community Event- Back to School Event	RHAC	8	7/30/2021	1
Garden Apartments	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	7/13/2021	1
	Direct Support	GED	RHAC	1	7/26/2021	1
Gateway Northwest	No Services Provided					
High Plains Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/5/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/13/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/15/2021	1
	Direct Support	Rent Assistance	South Plains Community Action Assc	1	7/30/2021	1
Jose Antonio Escajeda Apart	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	7/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	7/12/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	7/13/2021	1
	Direct Support	Rent Assistance	El Paso General Assistance, Roots ar	1	7/28/2021	1
La Estancia	On Site Library	Up and running. Free to all residents during business hours. We	Hamilton Valley Management	1	7/1/2021	1
	Health and Nutrition	Home health came out and did a health and wellness presentati	Home Health	3	7/14/2021	1
	Health Screening	BeeFirst Care came out and did blood pressure checks for reside	Bee First	3	7/14/2021	1
	Hurricane Safety	We partnered with the Lyford Police department for this service	Lyford PD	32	7/21/2021	1
La Posada Apartments	Health Screening	Partnered with Con Amor Primary Home Care to do a health scr	Con Amor Primary Home Care	21	7/22/2021	1
	Crime Watch Meeting	Hidalgo County Sheriff Department came out for our presentati	Hidalgo CSD	21	7/13/2021	1
	On site Library	Free and available to all residents during business hours.	Hamilton Valley Management	2	7/1/2021	1
	Notary	Free and available to all residents during business hours.	Hamilton Valley Management	2	7/1/2021	1

July Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	5	7/1/2021	1
	Community Garden	Free and available to all residents 24/7.	Hamilton Valley Management	4	7/1/2021	1

July Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
La Reina Apartments	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	10	7/1/2021	1
	Diabetes Course	Good Shepherd Home Care was scheduled to come out and do	Good Shepherd Home Care	0	7/21/2021	1
	Free Transportation Tickets	During business hours residents can obtain free transportation	Valley Metro	4	7/1/2021	1
	Crime Watch	We have a group of residents who have a crime watch for our p	Police and HVM	2	7/1/2021	1
La Sombra	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	7	7/1/2021	1
	Fire Safety	Partnering with Hidalgo County Sheriff's Department they came	Hidalgo County Sheriff Department	19	7/21/2021	1
	hurricane safety	Partnering with Hidalgo County Sheriff's Department they came	Hidalgo County Sheriffs Department	19	7/21/2021	1
Las Palmas Apartments	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	3	7/1/2021	1
	Business Center	Free and available to residents during business hours. Services i	Hamilton Valley Management	1	7/1/2021	1
	Low Cost Healthy Cooking	Class taught the health benefits of pecans and how to make a tr	Hamilton Valley Management	10	7/12/2021	1
	Job Skills Training	Partnered with Workforce Solutions. In person training was can	Workforce Solutions	36	7/30/2021	1
Leuty Avenue Apartments	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Community Garden	Free and available to all residents.	Hamilton Valley Management	2	7/1/2021	1
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	1	7/1/2021	1
	Low Cost Healthy Cooking	Taught residents how to make healthier and cost effective wing	Hamilton Valley Management	8	7/29/2021	1
	Health and Nutrition	A health and nutrition course on the importance of eating fruits	Home Health	5	7/22/2021	1
Los Ebanos Apartments	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	7/12/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	7/13/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	7/15/2021	1
	Direct Support	ESL Program	RHAC	1	7/27/2021	1
	Direct Support	GED	RHAC	1	7/27/2021	1
Los Naranjos Apartments	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	7	7/1/2021	1
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	6	7/1/2021	1
	Heart Disease Class	Home health provided a heart health class for the residents.	All Seasons Home Health	11	7/14/2021	1
	Crime Watch Meeting	Alton PD came and gave pointers on how to start a crime watch	Alton PD	22	7/21/2021	1
Marshall Meadows	No Services Provided					
Oak Haven Apartments	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	3	7/1/2021	1
	Fire Safety	Partnered with Hidalgo County Sheriff's Department for a cours	Hidalgo County Sheriff Department	1	7/21/2021	1
	Hurricane Safety	Partnered with Hidalgo County Sheriff's Department for a cours	Hidalgo County Sheriffs Department	1	7/1/2021	1
Palladium Glenn Heights	Notary Service	Notarize Legal Documents	Palladium Glenn Heights	3	7/1/2021	1
	Neighborhood Crime Watch	Courtesy Office Discuss Crime in city	Courtesy Officer	6	7/1/2021	1
	Personal Insurance Worksh	Financial Skills	Cares Team	3	7/1/2021	1
Palladium Midland	No Services Provided					
Peoples El Shaddai	Notary Service	Notary Service	Peoples El Shaddai	0	7/1/2021	1
Peppertree Acres Apartment	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	7/12/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	7/13/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	7/15/2021	1
Pine Club	Valet Trash Service	Provide valet trash service to all residents	Pine Club Staff	232	7/1/2021	1
	Fax/Copy	Provide free fax and copy service to all applicants and residents	Pine Club Staff	4	7/1/2021	1
	Notary	Provide free notary to all applicants and residents	Christina Durden	3	7/1/2021	1
	Transportation	Free Uber gift cards for transportation to store or resident choi	Pine Club Staff	1	7/17/2021	1
Pythian Manor	Notary Services	Notary Services	Pythian	0	7/1/2021	1
Raintree Apartments	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	3	7/1/2021	1
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	4	7/1/2021	1
	Community Garden	Free and available to residents 24/7.	Hamilton Valley Management	4	7/1/2021	1
	Resume/Job Skills	Partnered with Workforce Solutions for this program, but due to	Workforce Solutions	31	7/5/2021	1
	Fire Safety	Partnered with the fire department for this program, but due to	Fire Department	31	7/2/2021	1
	Crime Watch	Partnered with the police department for this program, but due	Alamo Police Department	31	7/14/2021	1
	Counseling Services	We have partnered with Palm Behavioral Health to provide cou	Palms Behavioral Health	1	7/28/2021	1
Ridgewood	Valet Trash Service	Provide resident valet trash service	Ridgewood Staff	232	7/1/2021	1
	Fax/Copy	Provide free copy and fax service to all residents and applicants	Ridgewood Staff	5	7/1/2021	1
	Notary	Provide free notary to all applicants and residents	Tammy Davis	1	7/1/2021	1

July Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Resident Social	School Supply distribution to all children	Dalcor/Ridgewood Staff	72	7/30/2021	1
	Crime Meeting	Monthly Crime Meeting	Ridgewood Staff & Officer Perkins	4	7/21/2021	1

July Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Rita Blanca	Library	Library- 2-3 residents enter office library at a time to select a do	Marti Harris	2	7/1/2021	1
	Diaper Pantry	Diaper Pantry- delivery of diapers.	Marti Harris	4	7/21/2021	1
River Park Village	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/12/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/13/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/15/2021	1
Saddlewood Club	Valet Trash Service	Provide valet trash service to all residents	Saddlewood Staff	232	7/1/2021	1
	Fax/Copy	Provide free fax/copy service for all applicants & residents	Saddlewood Staff	0		1
	Notary	Provide free notary service for all applicants & residents	Lee Ann Rodgers	0	7/1/2021	1
	Health	COVID Vaccine	Wilson Pharmacy	9	7/10/2021	1
	Food Pantry	Provide free open food pantry residents	Saddlewood Staff	1	7/1/2021	1
Salem Village	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	7/13/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	7/15/2021	1
	Direct Support	GED	RHAC	1	7/30/2021	1
Saint James Manor	Notary Services	Notary Services	Saint James Manor	0	7/1/2021	1
Seagraves Garden Apartmen	Business Center	Free and available to residents during business hours. Services i	Hamilton Valley Management	4	7/1/2021	1
	Community Garden	Free and available to residents 24/7. The manager had an organ	Hamilton Valley Management	3	7/15/2021	1
	On site Library	Free and available to residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Low Cost Healthy Cooking	Manager planned an outdoor cooking demonstration, but had t	Hamilton Valley Management	30	7/28/2021	1
	Vaccination Clinic	Passed out information from South Plains Public Health- where	South Plains Public Health	30	7/19/2021	1
Shady Oaks Manor	No Services Provided					
Sierra Vista	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	7/13/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	7/29/2021	1
	Direct Support	Immediate Workforce Program	RHAC	2	7/1/2021	1
Silver Trail	Community Garden	On hold because the property is in the middle of their rehab- m	Hamilton Valley Management	0	7/1/2021	1
	Business Center	On hold because the property is in the middle of their rehab- m	Hamilton Valley Management	0	7/1/2021	1
	On site Library	On hold because the property is in the middle of their rehab- m	Hamilton Valley Management	0	7/1/2021	1
	Health and Nutrition Course	On hold because the property is in the middle of their rehab- m	Texas AgriLife	0	7/1/2021	1
Spring Terrace	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/13/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/15/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/19/2021	1
Tealwood Club	Valet Trash Service	Provide valet trash service to all residents	Tealwood Staff	180	7/1/2021	1
	Fax/Copy	Provide fax and copy service to all residents and applicants	Tealwood Staff	1	7/1/2021	1
	Notary	Provide Notary service to all applicants and residents	Misty B	0	7/1/2021	1
	Food Pantry	Provide open free food pantry to all residents	Tealwood Staff	1	7/1/2021	1
	Transportation	Provide free bus passes to all residents	Tealwood Staff	1	7/1/2021	1
	Crime	Crime Meeting	Officer Biter	10	7/24/2021	1
The Village Apartments	On Site Library	Free and available to all residents.	Hamilton Valley Management	4	7/1/2021	1
	Exercise Class	Offered weekly on Wednesdays for residents to participate in- a	Hamilton Valley Management	6	7/7/2021	1
	Book Club	Offered every Tuesday of the month for residents to discuss the	Hamilton Valley Management	6	7/6/2021	1
	Health Screening	Podiatrist, Dr. Conley came to do a health screening/assessment	Dr. Conley	7	7/26/2021	1
The Willows	Home Deliveries	Case Manager Provided Home Deliveries	MLF	1	7/7/2021	1
	Direct Support Medical		MLF	1	7/7/2021	1
	Direct Support Other	1. 7/6 help man to move furniture, EF	MLF	4	7/6/2021	1
	Medical and Health Services	1. 7/7 take out trash for woman w/TBI, SB	MLF	3	7/7/2021	1
	Direct Support Other	1. 7/21 go to corner store for man, JN	MLF	5	7/21/2021	1
	Vocational Development	Case Manager Provided Counseling Services via phone	MLF	4	7/22/2021	1
	Transportation Services	Case Manager Provided MLF Transportation	MLF	2	7/26/2021	1
Valley View Apartments	On Site Library	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Notary	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Business Center	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Community Garden	Free and available to residents 24/7. Property is under rehab an	Hamilton Valley Management	0	7/1/2021	1

July Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Villa Vallarta	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	2	7/1/2021	1
Vista Verde	On Site Library	Free and available for residents during business hours.	Hamilton Valley Management	2	7/1/2021	1
	Community Garden	Free and available for residents to use at all times.	Hamilton Valley Management	5	7/1/2021	1
	Annual Health Fair	We partnered with Frio County Home Health for this event. It w	Frio County Home Health	11	7/22/2021	1
	Diabetes Class	A home health nurse came and presented a class on diabetes. I	Dora Gallego	11	7/22/2021	1
Walnut Creek Apartments	Fitness & Exercise class	Walking Group	Portfolio	3	7/10/2021	1
	Drug Awareness Workshop	Community D.A.R.E	Portfolio	1	7/12/2021	1
	Adult Development	Cyber Security Avoiding Hackers class	Portfolio	1	7/23/2021	1
	Job & Career Development	Monetizing Your Talent	Portfolio	2	7/31/2021	1
Willow Green	Valet Trash Service	Provide valet trash service to all residents	Willow Green Staff	336	7/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Willow Green Staff	7	7/1/2021	1
	Notary	Provide free notary service to all applicants and residents	Jackie Rodas	0	7/1/2021	1
	Food Pantry	Provide free food pantry to all residents	Willow Green & Food Bank	1	7/1/2021	1
	Tutoring	Provide summer tutoring to all K-12 children	Cy-Fair ISD	19	7/1/2021	1
Willowick Apartments	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Business Center	Free and available to residents during business hours. Services	Hamilton Valley Management	3	7/1/2021	1
	Exercise Class	Yoga class in person and offered on ZOOM.	Hamilton Valley Management	5	7/13/2021	1
	Diabetes Class	Provider cancelled, but every unit was provided with informatio	Hamilton Valley Management and C	26	7/15/2021	1
Windmill Apartments	Safety Program	Giddings Police Department provided informative brochures on	Giddings PD	26	7/1/2021	1
	Low Budget Healthy Cooking	Using resources from nutrion.gov the manager presented heal	Hamilton Valley Management	26	7/7/2021	1
	On site Library	Free and available to all residents during business hours.	Hamilton Valley Management	1	7/1/2021	1
	Diabetes Class	The scheduled health care provider cancelled due to covid, but	HVM and CDC	26	7/15/2021	1
	Exercise Class	Zoom yoga class offered as Windmill has not community room.	Hamilton Valley Management	1	7/13/2021	1
	Business Center	Free and available to all residents during business hours. Service	Hamilton Valley Management	3	7/1/2021	1
Windwood	On Site Library	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Business Center	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Notary	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
Win-Lin Village Apartments	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/12/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/13/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	7/19/2021	1
	Direct Support	GED	RHAC	1	7/2/2021	1
Woodglen Park I & II	Valet Trash Service	Provide valet trash service to all residents	Woodglen Staff	232	7/1/2021	1
	Fax/Copy	Provide free fax and copy service to all applicants and residents	Woodglen Staff	12	7/1/2021	1
	Notary	Provide free notary service to all applicants and residents	Primera Sanchez	0	7/1/2021	1
	Food Pantry	Provide free open food pantry to all residents	Woodglen Staff	1	7/1/2021	1
	Crime Watch	Crime Meeting	Woodglen + DPD	8	7/28/2021	1
Woodside Village	HIV Awareness	Education on HIV	Brown Health Center	2	7/23/2021	1



August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Aguila Oaks	Library Use	The library services were available to residents. Residents were	Cesar Chavez Foundation	17	8/1/2021	1
	Backpack Distribution	Alternative services were provided to assist residents in need. B	Cesar Chavez Foundation	48	8/6/2021	1
	COVID-19 Vaccine Distribution	Alternative services were provided to assist residents in need. B	Cesar Chavez Foundation	17	8/1/2021	1
	Computer Literacy	Alternative services were provided to attendees due to the COV	Cesar Chavez Foundation	3	8/6/2021	1
AHA! At Briarcliff	No Services Provided					
Brooks Manor	Food Pantry	Food Pantry	Place of Grace	29	9/5/2021	1
	Notary Service	Notary Service	Brooks Manor	1	9/9/2021	1
Brush Country Cottages	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	1	8/1/2021	1
	Notary	Free and available to residents during business hours.	Hamilton Valley Management	1	8/1/2021	1
	Business Center	Free and available to residents during business hours. Services i	Hamilton Valley Management	1	8/1/2021	1
	Free Transportation	Free and available to residents during business hours. Must sch	Hamilton Valley Management	2	8/1/2021	1
Chaparral Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	80	8/23/2021	1
	Direct Support	Utility Assistance	Reliant Energy, HOPWA, Permian Basin	3	8/25/2021	1
	Direct Support	Food Assistance	Catholic Charities, Permian Basin Miss	1	8/19/2021	1
	Direct Support	Clothing Assistance	Permian Basin, Odessa Christian Faith	2	8/23/2021	1
Chula Vista	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	1	8/1/2021	1
	Community Garden	Free and available to residents 24/7.	Hamilton Valley Management	3	8/1/2021	1
	Health Screening	Cancelled due to COVID outbreak on property.	Med Team	0	8/16/2021	1
	Book Club	Cancelled due to COVID outbreak on property.	Library and HVM	0	8/23/2021	1
Cielo Lindo Apartments	On Site Library	Free and available to residents during business hours. They are	Hamilton Valley Management	3	8/1/2021	1
	Business Center	Free and available to residents during business hours. Services i	Hamilton Valley Management	4	8/1/2021	1
	Community Garden	Free and available to residents 24/7/.	Hamilton Valley Management	2	8/1/2021	1
	Free Transportation	Free and available to residents during business hours. Residents	Valley Metro	2	8/1/2021	1
Cove Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/5/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/23/2021	1
	Community Awareness	Back to School Backpack Event	RHAC	20	8/3/2021	1
El Nido	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	104	8/23/2021	1
	Direct Support	Utility Assistance	Guardian Angel Catholic Church- St. Vi	2	8/23/2021	1
Garden Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	62	8/23/2021	1
	Direct Support	Utility Assistance	Catholic Family Services, Salvation Arm	1	8/17/2021	1
	Community Awareness	Back to School Event	RHAC, Lubbock Fire Department, Crick	28	8/13/2021	1
Gateway Northwest	No Services Provided					
High Plains	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/23/2021	1
	Direct Support	Utility Assistance	Catholic Family Services, Salvation Arm	1	8/23/2021	1
Jose Antonio Escajeda	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	94	8/23/2021	1
La Estancia	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	1	8/1/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
La Posada Apartments	On Site Library	Free to all residents during business hours.	Hamilton Valley Management	3	8/1/2021	1
	Notary	Free to all residents during business hours.	Hamilton Valley Management	5	8/1/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Business Center	Free to all residents during business hours. Services include cop	Hamilton Valley Management	5	8/1/2021	1
	Personal Insurance	Kemper Life came and did a presentation on personal insurance	Kemper Life	9	8/25/2021	1
La Reina Apartments	Crime Watch	La Villa Police came and did a presentation on Crime and how t	La Villa PD	10	8/26/2021	1
	On site Library	Free and available to residents during business hours.	Hamilton Valley Management	2	8/1/2021	1
	Hurricane Safety	Presentation on how to be prepared and stay safe during hurric	Corina Salazar	7	8/25/2021	1
	Free Transportation	Free passes available to residents during business hours for the	Valley Metro	2	8/1/2021	1
	Business Center	Free and available to residents during business hours. Services t	Hamilton Valley Management	2	8/1/2021	1
La Sombra	On Site Library	Free and available to residents during office hours.	Hamilton Valley Management	2	8/1/2021	1
	Business Center	Free and available to residents during office hours. Services inc	Hamilton Valley Management	6	8/1/2021	1
	Community Garden	Free to residents 24/7. In October Texas AgriLife will come out	Texas AgriLife/HVM	3	8/1/2021	1
	Health Screening	This was canceled due to the manager having to quarantine.	Bee 1st	0	8/15/2021	1
Las Palmas Apartments	On Site Library	Free and available to residents during business hours.	HVM	1	8/1/2021	1
	Book Club	Started August 16th with a group meeting each week to discuss	HVM	19	8/16/2021	1
	Health Screening	American Medical did a screening and awareness program on P	American Medical	3	8/25/2021	1
	Health and Nutrition Courses	Legacy Home Health did a presentation on staying active as you	Legacy Home Health	7	8/18/2021	1
Leuty Avenue Apartments	On Site Library	Free and available to residents during office hours.	Hamilton Valley Management	1	8/1/2021	1
	Notary	Free and available to residents during office hours.	Hamilton Valley Management	1	8/1/2021	1
	Business Center	Free and available to residents during office hours. Services inc	Hamilton Valley Management	1	8/1/2021	1
	Community Garden	Free and available to residents 24/7.	Hamilton Valley Management	2	8/1/2021	1
Los Ebanos	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	65	8/23/2021	1
	Direct Support	Medical Assistance	Help America Corporation, Good neigh	1	8/24/2021	1
Los Naranjo's Apartments	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	4	8/1/2021	1
	Business Center	Free and available to residents during business hours. Services i	Hamilton Valley Management	7	8/1/2021	1
	Vaccinations	Every resident received flyers for the free vaccine clinic in the c	Richards Pharmacy	30	8/11/2021	1
	Health and Nutrition Courses	Good Shepherd gave a program on aging and wellness during th	Good Shepherd PHC	10	8/24/2021	1
Marshall Meadows	No Services were Provided					
Oak Haven Apartments	On Site Library	Free and available for residents during office hours.	Hamilton Valley Management	1	8/1/2021	1
	Business Center	Free and available for residents during office hours. Services inc	Hamilton Valley Management	4	8/1/2021	1
	Community Garden	Texas AgriLife is scheduled to come out and help in October for	Texas AgriLife	3	8/1/2021	1
	Health Screening	Postponed due to the manager having to quarantine.	Bee 1st	0	8/15/2021	1
Palladium Glenn Heights	Food Pantry	Available To Resident In Need Every Friday	Cares Team/ Office	5	8/1/2021	1
	Notary Service	Notarize Legal Documents	Cares Team/ Office	2	8/1/2021	1
	Free Rides For Elderly	Free Transportation	Cares Team /Impacting The Vision Out	8	8/1/2021	1
	My Money GPS	Financial Workshop	Non-Profit	10	8/1/2021	1
	Back To School Pool Party	School Supplies And Back Pack Donation	Cares Team/ Office/2 Vendors	19	8/1/2021	1
	Excellence by Designed Center	Steam Engineering For Future Work Shop	Non Profit	2	8/1/2021	1
Palladium Midland	GED Class	Assisting residents with studying for their GED.	Lavonda Johnson	3	8/17/2021	1
	Swimming Lessons	The YMCA came out and provided swimming lessons to the resi	Austin Murphy	7	8/20/2021	1
	Self Defense	The courtesy officer provided self defense courses.	Eshariif Savaho	0	8/28/2021	1
	Money Management	Teaching residents how to properly write checks/money orders	Amy Curry	13	8/11/2021	1
	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	8/2/2021	1
Peoples El Shaddai	Free School Supplies	Free School Supplies	Peoples El Shaddai	0	8/14/2021	1
	Free Meals	Free Meals	Peoples El Shaddai	0	8/13/2021	1
Peppertree Acres	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	148	8/23/2021	1
	Direct Support	Rent Assistance	Fort Worth Housing Solutions, Salvati	1	8/31/2021	1
	Direct Support	Utility Assistance	Fort Worth Housing Solutions, Salvati	2	8/31/2021	1
	Direct Support	Credit Counseling	Transformance, The Learning Center o	1	8/31/2021	1
	Direct Support	GED	RHAC	1	8/31/2021	1
Pine Club	Fax/Copy	Provide free fax and copy service to all residents and applicants	Pine Club Staff	4	8/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Christina Durden	0	8/1/2021	1
	Resident Social	Back to School supply distribution	Pine Club Staff	31	8/13/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Job	Job Interview Tips	Pine Club Staff	0	8/30/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Pythian Manor	Food Pantry	Food Pantry	Place of Grace	34	8/5/2021	1
Raintree Apartments	On Site Library	Free and available to residents during office hours.	Hamilton Valley Management	2	8/1/2021	1
	Business Center	Free and available to residents during office hours. Services inc	Hamilton Valley Management	3	8/1/2021	1
	Community Garden	Free and available to residents 24/7. Texas AgriLife is planning t	HVM and Texas AgriLife	2	8/1/2021	1
	Job Fair	Partnering with Workforce Solutions. Due to covid they were u	Workforce Solutions	32	8/23/2021	1
Ridgewood	Fax/Copy	Provide free fax and copy services to all residents and applicant	Ridgewood Staff	12	8/1/2021	1
	Notary	Provide free notary services to all residents and applicants	Tammy Davis	3	8/1/2021	1
	Food Pantry	Provide free food pantry to all residents	Ridgewood Staff	7	8/18/2021	1
	Resident Social	Back to School Supply Distribution	Ridgewood Staff/Dalcor	64	8/7/2021	1
Rita Blanca	Hygiene Pantry	Hygiene Pantry- delivery of hygiene products.	Marti Harris	28	8/12/2021	1
	Library	Library - to 3 residents allowed in office at a time to select a dc	Marti Harris	2	8/30/2021	1
River Park Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/23/2021	1
Saddlewood Club	Fax/Copy	Provide free fax and copy service to all applicants and residents	Saddlewood Staff	3	8/1/2021	1
	Notary	Provide free Notary service to all applicants and residents	Rosie Lopez	0	8/1/2021	1
	Food Pantry	Provide free open food pantry to all residents	Saddlewood	5	8/1/2021	1
	Crime Watch	Crime Meeting	Rosie Lopez	2	8/9/2021	1
Saint James Manor	Free Meals	Free Meals	Saint James	0	8/13/2021	1
	Free School Supplies	Free School Supplies	Saint James	0	8/14/2021	1
Salem Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	8/5/2021	1
	Career Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	105	8/23/2021	1
	Direct Support	Rent Assistance	Texas Rent Relief, St. Vincent de Paul, &	2	8/31/2021	1
	Direct Support	Food Assistance	St. Vincent de Paul, Victoria Christian A	1	8/31/2021	1
Seagraves Garden Apartments	Business Center	Free copy and fax services available to all residents during busi	HVM	5	8/1/2021	1
	Community Garden	Free and available to all residents at anytime. Residents are abl	HVM	2	8/1/2021	1
	On-Site Library	Residents are able to check out books during business hours. Th	HVM	3	8/1/2021	1
	Notary	Service is available to all residents free of charge during office h	HVM	2	8/1/2021	1
	Fire Safety	Fire Safety presentation that focused on keeping our pets safe d	Fire Department	4	8/26/2021	1
	Green Living	Presentation focusing on the benefits of cleaning with lemons!	HVM	3	8/20/2021	1
	Free Transportation	Free transportation tickets available in office during business ho	TRAX	2	8/1/2021	1
Shady Oaks Manor	No Services Provided					
Sierra Vista	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	106	8/23/2021	1
	Direct Support	Rent Assistance	El Paso General Assistance, St. Raphael	1	8/31/2021	1
	Direct Support	Counseling Assistance	Pinnacle Social Service, Emergency He	1	8/2/2021	1
	Direct Support	Legal Assistance	Texas Rio Grande Legal Aid Inc., US De	1	8/2/2021	1
	Direct Support	Food Assistance	El Pasonans Fighting Hunger, Emergen	2	8/31/2021	1
	Direct Support	ESL Program	RHAC	1	8/2/2021	1
Silver Trail	No Services Provided					
Spring Terrace	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/23/2021	1
	Children Services	Kids Club	Mission Amarillo	5	8/3/2021	1
	Direct Support	Dental Assistance	Affordable Dentures and Implants, Tex	1	8/13/2021	1
Tealwood Club	Fax/Copy	Provide free fax & copy service to all applicants and residents	Tealwood Staff	5	8/1/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Notary	Provide free notary service to all applicants and residents	Primera Sanchez	0	8/1/2021	1
	Transportation	Provided free bus passes to all residents	Tealwood Staff	2	8/1/2021	1
	Crime	Crime Meeting	Officer Biter	2	8/12/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
The Village Apartments	On Site Library	In the middle of rehab- most residents living off property for th	Hamilton Valley Management	0	8/1/2021	1
	Business Center	In the middle of rehab- most residents living off property for th	Hamilton Valley Management	0	8/1/2021	1
	Exercise Class	In the middle of rehab- most residents living off property for th	Hamilton Valley Management	0	8/1/2021	1
	Community Garden	In the middle of rehab- most residents living off property for th	Hamilton Valley Management	0	8/1/2021	1
The Willows	Direct Support Other	1. 8/11 download/print Tx. Employment forms for woman, DB	MLF	4	8/12/2021	1
	Direct Support Financial	1. 8/17 call HACA re. Sect. 8 rent payment amount, man DB	MLF	2	8/17/2021	1
	Medical and Health Services	1. 8/16 check renewal status of SNAP for woman w/TBI, SN	MLF	5	8/16/2021	1
	Transportation Services	1. 8/17 drive man to insurance co., S. Congress & B. White, DB	MLF	2	8/17/2021	1
	Direct Support Medical	1. 8/23 call & email ROHO GRP. again re. replacement of	MLF	1	8/23/2021	1
	Medical and Health Services	1. 8/24 download SSA Bene.s letter & other documents	MLF	4	8/24/2021	1
Valley View Apartments	On Site Library	Free and available to residents during office hours.	Hamilton Valley Management	1	8/1/2021	1
	Business Center	Free and available to residents during office hours. Services inc	Hamilton Valley Management	2	8/1/2021	1
	Health and Nutrition	Though not a good turn-out the county agent came to plan and	Texas AgriLife	1	8/25/2021	1
	Community Garden	Free and available to residents 24/7. The county extension ager	Texas AgriLife	1	8/25/2021	1
Villa Vallarta	On Site Library	Free to all residents during business hours.	Hamilton Valley Management	3	8/1/2021	1
Vista Verde	On Site Library	Free and available for residents during business hours.	Hamilton Valley Management	2	8/1/2021	1
	Business Center	Free and available for residents during business hours. Services	Hamilton Valley Management	1	8/1/2021	1
	Community Garden	Free and available for residents 24/7. Residents help tend the g	Hamilton Valley Management	2	8/1/2021	1
	Free Transportation	Free passes available for pick up for residents during business h	SWART	11	8/1/2021	1
Walnut Creek Apts	Fitness & Exercise class	Out Door Exercise Class 11:00AM-12:00PM	Portfolio	5	8/4/2021	1
	Financial Planning/Credit Counsel	Credit Smart 11:00AM-12:00PM	Portfolio	3	8/11/2021	1
	Weekday Character Building	Book Club :00PM-5:00PM	Portfolio	3	8/11/2021	1
	Social Services and Referrals	Rent & Utility Assistance 11:00AM-1:00PM	Portfolio	8	8/25/2021	1
Willow Green	Fax/Copy	Provide free fax and copy service to all residents and applicants	Willow Green Staff	1	8/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Jackie Rodas	0	8/1/2021	1
	Crime Watch	Crime meeting	Willow Green Staff	3	8/20/2021	1
	Transportation	Free Uber pass	Willow Green Staff	1	8/1/2021	1
Willowick Apartments	On site Library	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Notary	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
	Business Center	Free and available to residents during business hours. Property	Hamilton Valley Management	0	7/1/2021	1
Windmill Apartments	No Services Provided					
Windwood	On Site Library	Free and available to all residents during business hours.	Hamilton Valley Management	3	8/1/2021	1
	Business Center	Free and available to all residents during business hours. Servic	Hamilton Valley Management	5	8/1/2021	1
	Community Garden	Free and available to all residents 24/7.	Hamilton Valley Management	1	8/1/2021	1
Win-Lin Village Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/2/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/3/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/5/2021	1
	Career Services	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/9/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Rai	RHAC	50	8/23/2021	1
	Direct Support	GED	RHAC	1	8/30/2021	1

August Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Woodglen Park I & II	Fax/Copy	Provide free fax & copy service to all applicants and residents	Woodglen Staff	7	8/1/2021	1
	Notary	Provide free notary service to all applicants and residents	Primera Sanchez	0	8/1/2021	1
	Food Pantry	Provide free food pantry to all residents	Woodglen Staff	2	8/1/2021	1
	Nutrition	After School Meals (30 given per day- all month)	Nutrition Transitions, Inc	30	8/1/2021	1
Woodside Village	Secrets Vs Surprises	We hosted a back to school bash and handed out pamphlets an	Woodside Villages/ Evangelistic Templ	63	8/7/2021	1
	Domestic Violence	We hosted a safety meeting on Domestic Violence sharing signs	Woodside Village	3	8/16/2021	1



September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Aguila Oaks	Library Use	The library services were available to residents. Residents were	Cesar Chavez Foundation	17	9/1/2021	1
	Parenting Class	Alternative services were provided to attendees due to COVID-	Cesar Chavez Foundation	0	9/17/2021	1
AHA! At Briarcliff Apartmen	Food Delivery	Good Apple delivers food boxes to our residents every other w	Good Apple	14	9/20/2021	1
	Notary	Kristen Davis is available as a notary during business hours	AHA!	0	9/1/2021	1
	Humana Neighborhood Cen	Our residents are invited to participate in Humana Neighborho	AHA! and Humana	5	9/15/2021	1
Brooks Manor	Food Pantry	Food Pantry	Place of Grace	44	9/1/2021	2
	Notary service	Notary service	Brooks Manor	0	9/1/2021	1
Brush Country Cottages	On Site Library	Free and available to residents during business hours.	Hamilton Valley Management	2	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	Hamilton Valley Management	2	9/1/2021	1
	Community Garden	Free and available to residents 24/7	Hamilton Valley Management	3	9/1/2021	1
	Book Club	Mr. Flores from BBC has started leading a book study on prop	BBC	10	9/7/2021	1
Chaparral Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	80	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	80	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	80	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	80	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	80	9/30/2021	1
	Direct Support	Utility Assistance	Reliant Energy, HOPWA, Permian Basi	3	9/27/2021	1
	Direct Support	Food Assistance	Catholic Charities, Permian Basin Miss	2	9/13/2021	1
	Direct Support	Rent Assistance	HOPWA, Texas Health and Human Ser	1	9/27/2021	1
	Direct Support	GED	RHAC	1	9/27/2021	1
Chula Vista	On Site Library	Free and available to residents during business hours.	HVM	1	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	2	9/1/2021	1
	Book Club	Book club sponsored by the county library. Residents get to dis	Duval Co Library	3	9/16/2021	1
	Low Cost Healthy Cooking	Also sponsored by the county library. Residents learned how to	Duval Co Library	3	9/16/2021	1
Cielo Lindo Apartments	On Site Library	Free and available to residents during business hours.	HVM	1	9/1/2021	1
	Notary	Free and available to residents during business hours.	HVM	1	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	2	9/1/2021	1
	Community Garden	Free and available to residents 24/7.	Hamilton Valley Management	3	9/1/2021	1
Cove Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/30/2021	1
El Nido Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	104	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	104	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	104	9/7/2021	1
	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	104	9/13/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	104	9/27/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	104	9/30/2021	1
	Direct Support	Senior Circle	RHAC	1	9/23/2021	1
Garden Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	62	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	62	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	62	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	62	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	62	9/30/2021	1
Gateway Northwest	No Services					
High Plains Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/30/2021	1
	Direct Support	Internet Assistance	Sudden Link, Emergency Broadband B	1	9/30/2021	1
Jose Antonio Escajeda Apar	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	94	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	94	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	94	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	94	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	94	9/30/2021	1
	Direct Support	ESL Program	RHAC	2	9/30/2021	1

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
La Estancia	On Site Library	Free and available to residents during business hours.	HVM	3	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	Hamilton Valley Management	2	9/1/2021	1
La Posada Apartments	On Site Library	Free and available to residents during business hours.	HVM	2	9/1/2021	1

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Notary	Free and available to residents during business hours.	HVM	2	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	2	9/1/2021	1
	Health Screening	Bee First Home Health offered blood pressure checks to residents	Bee First Home Health	6	9/3/2021	1
La Reina Apartments	On Site Library	Free and available to all residents during business hours.	HVM	5	9/1/2021	1
	Notary	Free and available to all residents during business hours.	HVM	1	9/1/2021	1
	Business Center	Free and available to all residents during business hours. Services	HVM	1	9/1/2021	1
	Health and Nutrition Course	Focused on Heat and Hydration, this health course was a great	Licensed Agent	12	9/20/2021	1
La Sombra	On Site Library	Free and available to residents during business hours.	HVM	1	9/1/2021	1
	Notary	Free and available to residents during business hours.	HVM	2	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	5	9/1/2021	1
	Community Garden	Free and available to residents 24/7.	Hamilton Valley Management	2	9/1/2021	1
Las Palmas Apartments	On Site Library	Free and available to all residents during business hours.	HVM	1	9/1/2021	1
	Notary	Free and available to all residents during business hours.	HVM	0	9/1/2021	1
	Business Center	Free and available to all residents during business hours. Services	HVM	2	9/1/2021	1
	Book Club	Twice monthly Book Club for residents to gather and discuss the	Hamilton Valley Management	12	9/13/2021	1
Leuty Avenue Apartments	On Site Library	Free and available to residents during business hours.	HVM	3	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	2	9/1/2021	1
	Community Garden	Free and available to residents 24/7	HVM	1	9/1/2021	1
Los Ebanos Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	65	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	65	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	65	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	65	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	65	9/30/2021	1
	Direct Support	ESL Program	RHAC	1	9/24/2021	1
Los Naranjo's Apartments	On Site Library	Free and available to all residents during business hours.	HVM	6	9/1/2021	1
	Notary	Free and available to all residents during business hours.	HVM	1	9/1/2021	1
	Business Center	Free and available to all residents during business hours. Services	HVM	7	9/1/2021	1
	Health and Nutrition	At 3:30 Dr. Burket did a presentation on Dental Health and its i	Dr. Jason Burket	13	9/22/2021	1
Marshall Meadows						
Oak Haven Apartments	On Site Library	Free and available to residents during business hours.	HVM	1	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	3	9/1/2021	1
	Community Garden	Free and available to residents 24/7.	HVM	2	9/1/2021	1
	Vaccination Clinic	Bee First Home Health did a presentation on flu vaccines and o	Bee First Home Health	1	9/15/2021	1
Palladium Glenn Heights	Business Center	Computer room for resident use	Palladium Glenn Office	12	9/1/2021	1
	Food Pantry	Perishable food items for residents	Palladium Glenn Heights	2	9/1/2021	1
	Notary Service	Notarize legal Service	Palladium Staff	1	9/1/2021	1
	After School Care	Assist with homework assignment	Cares Team	1	9/1/2021	1
	Tutoring	1 on 1 tutoring	Cares Team	1	9/1/2021	1
	Household Donations	Give household perishable & free transportation those that sig	Impacting The Vision Outreach	10	9/1/2021	1
	Covid Tests & Free Tablets	Sign residents up for Covid Tests and Free tablets	Non Profit	15	9/1/2021	1
Palladium Midland	Book Club	We meet and watch a short video, journal, and have a short dis	Lavonda Johnson	12	9/3/2021	1
	Domestic Violence Worksho	Group meeting discussing the different types of domestics viol	Bella Cross	16	9/20/2021	1
	Food Pantry	Residents can come during office hours if they are in need for F	Office Staff	13	9/29/2021	1
	Crime Watch	Discuss what's been going on in the property with residents. Th	Office Staff	3	9/30/2021	1
Peoples El Shaddai	No Services Provided					
Peppertree Acres Apartmen	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	148	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	148	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	148	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	148	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	148	9/30/2021	1
	Direct Support	Food Assistance	Funky Town Fridge, Meadowridge Cor	3	9/30/2021	1
	Direct Support	Child Care Assistance	Boys and Girls Club, The Salvation Arm	1	9/30/2021	1
Pine Club	Valet Trash Service	Provide valet trash service to all residents	Pine Club Staff	232	9/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Pine Club Staff	5	9/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Christina Durden	0	9/1/2021	1

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
	Food Pantry	Provide free food pantry to all residents	Pine Club Staff	0	9/1/2021	1
	Crime	Monthly crime meeting	Officer Boykin	7	9/12/2021	1
Pythian Manor	Food Pantry	Food Pantry	Pythian	5	9/1/2021	2

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Raintree Apartments	On Site Library	Free and available to residents during business hours.	HVM	8	9/1/2021	1
	Business Center	Free and available to residents during business hours.	HVM	2	9/1/2021	1
	Community Garden	Free and available to residents 24/7.	HVM	0	9/1/2021	1
Ridgewood	Valet Trash Service	Provide valet trash service to all residents	Ridgewood Staff	232	9/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Ridgewood Staff	1	9/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Tammy Davis	0	9/1/2021	1
	Food Pantry	Free food pantry available to all residents	Ridgewood Staff	3	9/1/2021	1
Rita Blanca	Library	Library- 2 to 3 Residents are allowed into office at a time to sel	Marti Harris	2	9/6/2021	1
	Hygiene Pantry	Hygiene Pantry- delivery of no contact hygiene products	Marti Harris	28	9/13/2021	1
River Park Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/30/2021	1
Saddlewood Club	Valet Trash Service	Provide valet trash service to all residents one time per week	Saddlewood Staff	232	9/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Saddlewood Staff	1	9/1/2021	1
	Notary	Provide free Notary service to all residents and applicants	Rosie Lopez	1	9/1/2021	1
	Food Pantry	Provide open food pantry to all residents at no cost	Saddlewood Staff	2	9/1/2021	1
	Service	Afterschool program for interaction with kids, activities, games	First Baptist Church	90	9/7/2021	2
Salem Village	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	105	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	105	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	105	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	105	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	105	9/30/2021	1
	Children Services	Tutoring	Mid Coast Family Services	6	9/20/2021	1
Saint James Manor	No Services Provided					
Seagraves Garden Apartme	On Site Library	Free and available top all residents during business hours.	HVM	1	9/1/2021	1
	Notary	Free and available top all residents during business hours.	HVM	2	9/1/2021	1
	Business Center	Free and available top all residents during business hours. Serv	HVM	3	9/1/2021	1
	Community Garden	Free and available top all residents 24/7.	HVM/ Texas Agrilife	3	9/1/2021	1
Shady Oaks Manor	No Services Provided					
Sierra Vista	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	106	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	106	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	106	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	106	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	106	9/30/2021	1
Silver Trail	On Site Library	Free and available to all residents during business hours.	HVM	2	9/1/2021	1
	Community Garden	Free and available to all residents 24/7.	HVM	1	9/1/2021	1
	Business Center	Free and available to all residents during business hours. Servic	HVM	5	9/1/2021	1
	Health Screening	This partner is scheduled to come out once a month for blood p	Hill Country Preferred Senior Care	0	9/20/2021	1
Spring Terrace	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/30/2021	1
	Direct Support	Rent Assistance	Texas Department of housing and Cor	3	9/17/2021	1
	Direct Support	Utility Assistance	Texas Department of housing and Cor	4	9/17/2021	1
Tealwood Club	Valet Trash Service	Provide valet trash service to all residents	Tealwood Staff	180	9/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Tealwood Staff	2	9/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Misty B	0	9/1/2021	1
	Food Pantry	Provide open pantry available to all residents	Tealwood Staff	1	9/1/2021	1
	Crime Meeting	Monthly Crime meeting	Officer Biter	0	9/20/2021	1
The Village Apartments	On Site Library	REHAB UNDERWAY- SERVICES STILL OFFERED, BUT MOST RESID	HVM	1	9/1/2021	1
	Notary	REHAB UNDERWAY- SERVICES STILL OFFERED, BUT MOST RESID	HVM	1	9/1/2021	1
	Health and Nutrition	REHAB UNDERWAY- SERVICES STILL OFFERED, BUT MOST RESID	Texas AgriLife	0	9/17/2021	1
	Business Center	REHAB UNDERWAY- SERVICES STILL OFFERED, BUT MOST RESID	HVM	1	9/1/2021	1

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
The Willows	Direct Support Other	1. 9/7 download & print certificate & renewal forms, woman	MLF	4	9/7/2021	1
	Medical and Health Services	1. 9/7 pack wheelchair cushion for return shipment for man	MLF	2	9/7/2021	1
	Vocational Development	masked and at distance	MLF	1	9/7/2021	1
	Transportation Services	1. 9/8 take package to FED EX for man RR	MLF	3	9/8/2021	1
	Direct Support Financial	1. 9/17 attempt replace SNAP card, phone system overloaded,	MLF	1	9/17/2021	1
	Direct Support Medical	1. 9/13 create "Medline" acct./order colostomy supplies,	MLF	1	9/13/2021	1
	Direct Support Other	1. 9/14 activate new phone card & reset PIN#, m JN	MLF	4	9/14/2021	1
	Vocational Development	masked and at distance	MLF	6	9/20/2021	1
Valley View Apartments	On Site Library	Free and available to all residents during business hours.	HVM	1	9/1/2021	1
	Business Center	Free and available to all residents during business hours. Service	HVM	2	9/1/2021	1
	Resume Workshop	Resume Building workshop through Workforce Solutions	Workforce Solutions	1	9/14/2021	1
	Community Garden	Free and available to all residents 24/7.	Hamilton Valley Management	1	9/1/2021	1
Villa Vallarta	On Site Library	Free and available to residents during business hours.	HVM	4	9/1/2021	1
	Notary	Free and available to residents during business hours.	HVM	2	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	2	9/1/2021	1
Vista Verde	On Site Library	Free and available to residents during business hours.	HVM	4	9/1/2021	1
	Business Center	Free and available to residents during business hours.	HVM	3	9/1/2021	1
	Community Garden	Free and available to residents during business hours.	HVM	4	9/1/2021	1
Walnut Creek Apartments	Adult Development	Making a schedule 12:00pm-2:00pm	Portfolio	3	9/9/2021	1
	Character Building	Teambuilding: Managing Conflict 12:00pm-2:00pm	Portfolio	1	9/10/2021	1
	Drug Awareness Workshop	Community D.A.RE. 2:00pm-4pm	Portfolio	2	9/30/2021	1
	Financial Planning/Credit Co	Money Management Help 2:00pm-4pm	Portfolio	3	9/12/2021	1
	Health Fair	Mini Health Fair	Portfolio	2	9/11/2021	1
	Job Skills/Training	Preparing for a Successful Job Interview 3:pm-4:00pm	Portfolio	2	9/12/2021	1
Willow Green	Valet Trash Service	Provide valet trash service to all residents	Willow Green Staff	336	9/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Willow Green Staff	2	9/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Jackie Rodas	1	9/1/2021	1
	Food Pantry	Provide open food pantry to all residents	Willow Green & Food Bank	1	9/1/2021	1
	Transportation	Uber giveaway- passes to resident	Willow Green Staff	1	9/1/2021	1
	Crime	Monthly Crime Meeting	Willow Green Staff & HPD	3	9/17/2021	1
	Tutoring	After school tutoring	CyFair ISD	50	9/1/2021	1
Willowick Apartments	On Site Library	Free and available top all residents during business hours.	HVM	4	9/1/2021	1
	Business Center	Free and available top all residents during business hours. Serv	HVM	5	9/1/2021	1
	Health and Nutrition	Texas Agrilife did a health and nutrition workshop for the resid	Texas AgriLife	7	9/15/2021	1
	Resume/Job Skills Workshop	Workforce Texoma did a resume and job skills workshop for the	Workforce Texoma	7	9/22/2021	1
Windmill Apartments	On Site Library	Free and available to residents during business hours.	HVM	3	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	2	9/1/2021	1
	Community Garden	Free and available to residents 24/7.	HVM	2	9/1/2021	1
	Health and Nutrition Course	A presentation on the importance and benefits of meditation h	Hamilton Valley Management	25	9/22/2021	1
Windwood	On Site Library	Free and available to residents during business hours.	HVM	2	9/1/2021	1
	Community Garden	Free and available to residents 24/7	HVM	1	9/1/2021	1
	Business Center	Free and available to residents during business hours. Services	HVM	6	9/1/2021	1

September Resident Services						
Property	Type of Service	Description	Provider	Number of Attendees	Date Provided	Points Assigned
Win-Lin Village Apartments	Medical and Health Services	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/1/2021	1
	Community Awareness	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/2/2021	1
	Career Service	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/7/2021	1
	Financial Skills	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/14/2021	1
	Housekeeping	Outreach - Online Resident Training - Webinar presented by Ra	RHAC	50	9/30/2021	1
Woodglen Park I & II	Valet Trash Service	Provide valet trash service to all residents	Woodglen Staff	232	9/1/2021	1
	Fax/Copy	Provide free fax and copy service to all residents and applicants	Woodglen Staff	9	9/1/2021	1
	Notary	Provide free notary service to all residents and applicants	Primera Sanchez	0	9/1/2021	1
	Food Pantry	Provide available food pantry to all residents at no cost	Woodglen Staff	2	9/1/2021	1
Woodside Village	Community Safety Meeting	Prevention of the spread of Covid-19 and how to keep your fan	Woodside Village	7	9/9/2021	1
	Community Safety Meeting	Affects of Smoking	Woodside Village	3	9/23/2021	1



Tab D

Quarterly Fundraising Report

**Texas State Affordable Housing Corporation**  
**2021 Quarterly Fundraising Report**  
**December 7, 2021**

2021/2022 Homeownership and Home Buyer Education Initiatives			
Funder	Amount	Status	Notes
Texas Financial Education Endowment	\$30,000	Partially Received	Two-year grant awarded in March 2020 to support 2020/2021 Housing Connection workshops for housing counselors
BBVA	\$16,500	Received	Received in September 2020 to support 2021 Housing Connection workshop
BBVA	\$23,000	Received	Received in June 2021 to provide home buyers with access to free home buyer education classes in specific counties.
Individual Donations	\$27,567	Received	Received between June 2020 and December 2021 to support the 2020-2022 Housing Connection workshops for housing counselors
Wells Fargo/Local Initiatives Support Corporation	\$7,000	Awarded	Awarded in November 2021 to support efforts to increase homeownership among households identifying as Black, Indigenous, and/or Persons of Color (BIPOC) in the Houston metro area
<b>Total Awarded/Received</b>	<b>\$104,067</b>		

2021 Permanent Supportive Housing (PSH) Institute			
JPMorgan Chase	\$10,000	Received	Initially awarded for 2020 Institute, but reallocated to 2021 Institute due to fundraising surplus
Texas Capital Bank	\$5,000	Received	Portion of a three-year, \$45,000 grant awarded in 2019 to support both PSH Institute and Texas Housing Impact Fund
Regions Bank	\$5,000	Received	Received in January 2021 to support 2021 PSH Institute
Inspireity	\$5,000	Received	Received in March 2021 to support 2021 PSH Institute
Frost	\$5,000	Received	Received in August 2021 to support 2021 PSH Institute
Dominium	\$5,000	Received	Received in August 2021 to support 2021 PSH Institute
JPMorgan Chase	\$50,000	Received	Received in August 2021 to support 2021 PSH Institute and grants to Institute participants
Wells Fargo	\$55,000	Received	Received in September 2021 to support 2021 PSH Institute
Texas Community Bank	\$10,000	Received	Received in November 2021 to support 2021 PSH Institute
Bank of America	\$25,000	Pending	Applied in June 2021 to support 2021 PSH Institute
Cigna	\$50,000	Declined	Applied in April 2021 to support 2021/2022 PSH Institutes

<b>Total Awarded/Received</b>	<b>\$150,000</b>
<b>Total Requests Pending</b>	<b>\$25,000</b>

TSAHC Grant Making Programs (Texas Foundations Fund, new TxDOT Initiative)			
Funder	Amount	Status	Notes
Texas Department of Transportation	\$27,000,000	Discussion	Entered discussions in October 2020 to administer grant funding to support affordable housing initiatives in Houston neighborhoods affected by I-45 expansion project. A portion of funds may be used for Texas Housing Impact Fund and Affordable Communities of Texas (ACT) programs as well. We are currently awaiting a contract from TxDOT to move forward.

<b>Total Requests Under Discussion</b>	<b>\$27,000,000</b>
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<b>Texas Housing Impact Fund</b>			
<b>Funder</b>	<b>Amount</b>	<b>Status</b>	<b>Notes</b>
<b>Texas Capital Bank</b>	\$10,000	Received	Portion of a three-year, \$45,000 grant awarded in 2019 to support both PSH Institute and Texas Housing Impact Fund. Final installment of \$15,000 received in April 2021.
<b>Texas Capital Bank</b>	\$1,500,000	Awarded	Texas Capital Bank approved a three year extension and increase to our current investment in July 2019
<b>Austin Community Foundation</b>	\$250,000	Received	Structured as a three year Program Related Investment to be used for the Texas Housing Impact Fund to support the AHA! at Briarcliff project
<b>Frost Bank</b>	\$4,000,000	Received	A community development loan initially awarded to fund down payment assistance for TSAHC's home buyer programs. In December 2018, Frost Bank granted TSAHC an extension and expanded the loan purpose to include the Texas Housing Impact Fund.
<b>Capital Magnet Fund</b>	\$3,750,000	Received	Awarded in February 2019 to support rental housing developments financed through the Texas Housing Impact Fund
<b>Austin Community Foundation</b>	\$100,000	Received	Program Related Investment approved in February 2020 to support a predevelopment fund in Central Texas. Award also includes a loan loss reserve of \$100,000
<b>Austin Community Foundation</b>	\$10,000	Received	Grant to support administrative expenses associated with launching the predevelopment fund
<b>Money Follows the Person (Texas Health and Human Services Program)</b>	\$2,458,736	Received	Funds will support the construction or rehabilitation of rental units for individuals eligible for Medicare Long Term Services and Supports
<b>Sisters of Charity of the Incarnate Word</b>	\$250,000	Received	Program Related Investment received in January 2021 to support Texas Housing Impact Fund
<b>Austin Community Foundation</b>	\$250,000	Awarded	Awarded in September 2021 support affordable housing projects financed by TSAHC's Texas Housing Impact Fund in Central Texas

<b>Total Received/Awarded</b>	<b>\$12,578,736</b>

<b>Affordable Communities of Texas (ACT) Program</b>			
<b>Funder</b>	<b>Amount</b>	<b>Status</b>	<b>Notes</b>
<b>Texas Community Bank</b>	\$500,000	Received	Texas Community Bank approved a 5 year renewal of TSAHC's EQ2 investment, extending the term from May 2020 to May 2025
<b>Arnold Ventures</b>	\$2,000,000	Declined	Applied for a Program Related Investment to support financing provided to ACT local partners

<b>Total Received</b>	<b>\$500,000</b>
<b>Summary</b>	
<b>Total Received/Awarded</b>	<b>\$13,332,803</b>
<b>Total Pending/Under Discussion</b>	<b>\$27,025,000</b>

Tab E

Monthly Financial Reports

# Texas State Affordable Housing Corporation

## Statement of Net Position (unaudited)

As of October 31, 2021

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### Assets

#### Current assets:

Cash and cash equivalents	\$ 6,312,699
Pooled investments	3,000,183
Restricted assets:	
Cash and cash equivalents	5,686,379
Short-term Investments, at Fair Market Value	2,314,999
Accrued interest	39,920
Custodial cash and cash equivalents	210,054
Investments, at fair value	6,489,625
Accounts receivable and accrued revenue	1,383,797
Accrued interest receivable	62,951
Loans receivable, current portion	67,779
Notes receivable, current portion	5,416,121
Downpayment assistance, current portion	553,011
Prepaid expenses	240,535
	<hr/>
Total current assets	31,778,053

#### Noncurrent assets:

Loans receivable, net of uncollectible amounts of \$247	279,347
Notes receivable, net of allowance for loss \$450,486	156,379,174
Investments, at fair market value	33,800,507
Mortgage servicing rights, net of accumulated amortization of \$2,598,202	129,859
Capital assets, net of accumulated depreciation of \$636,853	5,966,923
Owned real estate, federal & other programs, net of amortization of \$1,617,446	9,817,496
Downpayment assistance	116,122
Restricted investments held by bond trustee, at fair market value	26,166,828
	<hr/>
Total noncurrent assets	232,656,256

Total assets	\$ <u>264,434,309</u>
	(continued)

# Texas State Affordable Housing Corporation

## Statement of Net Position (unaudited)

As of October 31, 2021

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### Liabilities

#### Current liabilities:

Accounts payable and accrued expenses	\$ 421,871
Notes payable, current portion	365,330
Custodial reserve funds	210,054
Other current liabilities	1,754,076
Payable from restricted assets held by bond trustee:	
Revenue bonds payable, current portion	600,000
Accrued interest on revenue bonds	229,215

Total current liabilities	<u>3,580,546</u>
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#### Noncurrent liabilities:

Notes payable	2,099,729
Revenue bonds payable	27,867,073
Unearned revenue	<u>2,742,030</u>

Total noncurrent liabilities	<u>32,708,832</u>
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Total liabilities	<u>36,289,378</u>
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### Deferred Inflows of Resources

Deferred revenue	<u>152,079</u>
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Total deferred inflows of resources	<u>152,079</u>
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### Net Position

Invested in capital assets	5,966,923
Restricted for:	
Debt service	3,066,332
Other purposes	3,114,618
Unrestricted	<u>215,844,979</u>

Total net position	<u>227,992,852</u>
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Total liabilities and net position	<u><u>\$ 264,434,309</u></u>
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## Texas State Affordable Housing Corporation

### Statement of Revenues, Expenses and Changes in Net Position (unaudited) For the 2 Months Ending October 31, 2021

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Operating Revenues:	
Interest and investment income	\$ 340,834
Net increase (decrease) in fair value of investments	(405,735)
Single family income	23,568,875
Asset oversight and compliance fees	68,837
Rental program income	116,723
Multifamily income	154,012
Public support:	
Federal & state grants	3,507
Contributions	35,048
Other operating revenue	11,298
Total operating revenues	<u>\$ 23,893,399</u>
Operating Expenses:	
Interest expense on bonds and notes payable	\$ 47,072
Program and loan administration	34,797
Texas Foundation Fund Grants	140,000
Salaries, wages and payroll related costs	688,323
Professional fees and services	39,909
Depreciation and amortization	115,426
Office expense and maintenance	19,723
Travel and meals	6,424
Other operating expenses	102,008
Total operating expenses	<u>1,193,682</u>
Net income	22,699,717
Total net position, beginning	<u>205,293,135</u>
Total net position, ending	<u>\$ 227,992,852</u>

**Texas State Affordable Housing Corporation**  
**Budget Report**  
**October 31, 2021**

	<b>Annual Budget</b>	<b>Actual</b>	<b>Percent of Annual Budget</b>	<b>Reference</b>
<b>Revenue</b>				
Single Family Program Revenue	19,692,000	5,056,257	26%	①
Lending Program Revenue	6,251,000	68,008	1%	②
Multifamily Program Revenue	1,203,000	149,510	12%	
Rental Program Revenue	1,237,000	96,894	8%	
Federal & State Grants	1,036,000	15,437	1%	
Grants, Donations & Other Awards	385,000	35,048	9%	
Land Bank Revenue	195,000	7,435	4%	
Servicing Revenue	96,000	17,147	18%	
Investment Revenue	1,535,000	556,930	36%	③
<b>Total Revenue</b>	<b>31,630,000</b>	<b>6,002,666</b>		
<b>Expenditures</b>				
Texas Housing Impact Fund	9,975,000	-	0%	
Affordable Communities of Texas	7,700,000	18,755	0%	
Other Program Expenditures	4,310,000	76,488	2%	
Salaries & Payroll Related Expenditures	4,300,000	688,323	16%	
Grants	1,825,000	140,000	8%	
Principal & Interest on Notes Payable	1,748,000	20,860	1%	
Professional Services	636,000	39,909	6%	
Marketing	180,000	15,975	9%	
Insurance	257,000	32,408	13%	
Travel & Meals	118,000	6,424	5%	
Furniture, Equipment, & Software	56,000	6,712	12%	
Building Maintenance	54,000	7,713	14%	
Professional Dues, Conferences & Training	56,000	621	1%	
Sponsorships	20,000	1,000	5%	
Communication	28,000	3,927	14%	
Bank Fees & Charges	19,000	3,476	18%	
Publications, Subscriptions & Other Office Expenses	15,000	2,196	15%	
Freight, Delivery, Postage	12,000	1,257	10%	
Printing & Office Supplies	5,000	952	19%	
<b>Total Expenditures</b>	<b>31,314,000</b>	<b>1,066,996</b>		
<b>Excess Revenues Over Expenditures</b>	<b>316,000</b>	<b>4,935,670</b>		

**Average Expected Percent Received/Expended = 17%**



**Texas State Affordable Housing Corporation  
Budget Report  
October 31, 2021**

**Explanations**

- ① There is a lag time of approximately 60 to 90 days between the time a reservation is made and when the Corporation receives the income associated with a loan. The budget is based on the assumption that we will be reserving an average of \$20 to \$25 million each day. The income received in September and October is associated with loans made in the previous fiscal year when reservations were higher at approximately \$35 million each day. Consequently Single Family Revenue exceeds the budget as of the end of October 2021. We anticipate that this line item will be on target by year end.
- ② Lending and grant revenue flow into to the Corporation based on contractual agreements with varying payment arrangements. Consequently income is not received evenly throughout the year. We anticipate that all revenue will be on target by year end.
- ③ Investment revenue varies from month to month with some month's having more income than others depending on maturities, the payoff of loans supporting mortgage backed securities and other factors. We anticipate that this line item will be on target by year end.
- ④ All budget variances related to expenditures are due to the timing of disbursements. We anticipate that each budget line item will be at or below target by year end.

## Tab 1

Presentation, Discussion and Possible Approval of Minutes of the Board  
Meeting held on November 17, 2021.

**TEXAS STATE AFFORDABLE HOUSING CORPORATION  
BOARD MEETING**

**The Governing Board of the Texas State Affordable Housing Corporation (TSAHC)**

**November 17, 2021  
10:30 a.m.**

**Summary of Minutes**

**Call to Order**

**Roll Call**

**Certification of Quorum**

**The Board Meeting of the Texas State Affordable Housing Corporation (the “Corporation”) was called to order by Bill Dietz, Chair, at 10:34 a.m., on November 17, 2021, at the offices of Texas State Affordable Housing Corporation, 6701 Shirley Avenue, Austin, TX 78752. Roll Call certified that a quorum was present.**

**Members Present:**

Bill Dietz, Chair

Valerie Cardenas, Vice Chair

Andy Williams, Member

Lemuel Williams, Member

**Guests Present:**

Chris Spelbring, Raymond James

Jimmy Romell, Maxwell Locke & Ritter LLP

Routt Thornhill, Coats Rose

**President’s Report**

**David Long**

See page 6 in the official transcript.

**Tab 1            Presentation, Discussion and Possible Approval of Minutes of the Board Meeting held on October 13, 2021.**

Ms. Cardenas made a motion to approve the minutes of the Board meeting held October 13, 2021. Mr. Lemuel Williams seconded the motion. Mr. Dietz asked for public comment and none was given. A vote was taken, and the motion passed unanimously.

See page 11 in the official transcript.

**Tab 2            Presentation, Discussion and Possible Approval of the Annual Independent Financial Audit for the Fiscal Year Ending August 31, 2021.**

Presented by Melinda Smith, Chief Financial Officer and Jimmy Romell, Maxwell Locke Ritter

Mr. Lemuel Williams made a motion to approve the Annual Independent Financial Audit for the Fiscal Year Ending August 31, 2021. Ms. Cardenas seconded the motion. Mr. Dietz asked for public comment and none was given. A vote was taken, and the motion passed unanimously.

See page 11 in the official transcript.

**Tab 3            Presentation, Discussion and Possible Approval of Amendments to the Texas Community Capital (TCC) Organizational By-Laws to Adhere to U.S. Treasury's Community Development Financial Institutions (CDFI) Certification Requirements, and Other Items as Presented.**

Presented by David Danenfelzer, Senior Director, Development Finance

Ms. Cardenas made a motion to approve the Amendments to the Texas Community Capital (TCC) Organizational By-Laws to Adhere to U.S. Treasury's Community Development Financial Institutions (CDFI) Certification Requirements, and Other Items as Presented. Mr. Lemuel Williams seconded the motion. Mr. Dietz asked for public comment and none was given. A vote was taken. The motion passed unanimously.

See page 23 in the official transcript.

**Tab 4            Presentation, Discussion and Possible Approval of Amended Policies for the Texas Housing Impact Fund.**

Presented by David Danenfelzer, Senior Director, Development Finance

Mr. Andy Williams made a motion to approve the Amended Policies for the Texas Housing Impact Fund. Ms. Cardenas seconded the motion. Mr. Dietz asked for public comment and none was given. A vote was taken, and the motion passed unanimously.

See page 34 in the official transcript.

**Tab 5            Presentation and Discussion of the Texas State Affordable Housing Corporation's Fiscal Year 2021 and 2022 Strategic Plans.**

Presented by Janie Taylor, Executive Vice President; Katie Claflin, Director, Communications & Development; Joniel LeVecque, Director, Homeownership Programs; Tim Almquist, Director, Single Family Compliance

No action taken. Remainder of Department Heads' presentations will be at December Board Meeting.

See page 39 in the official transcript.

**Announcements and Closing Comments**

Mr. Long and Board Members tentatively scheduled the next Board Meeting for December 15, 2021, at 10:30am.

**Adjournment**

Mr. Dietz adjourned the meeting at 11:55am.

Respectfully submitted by \_\_\_\_\_  
Rebecca DeLeon, Corporate Secretary

## Tab 2

Presentation, Discussion and Possible Approval of a Resolution Authorizing the Texas State Affordable Housing Corporation to take preliminary action to carry out the financing of The Park on 14th located in Plano, Texas, including creating entities, negotiating finance documents, and filing applications to obtain debt financing and invest equity in the Project.

## CERTIFICATION

THE STATE OF TEXAS                   §  
  §  
TEXAS STATE AFFORDABLE           §  
HOUSING CORPORATION             §

I, the undersigned officer of the Texas State Affordable Housing Corporation (the “Corporation”), do hereby certify as follows:

1. The Board of Directors of the Corporation (the “Board”) convened on \_\_\_\_\_, 2021, at the Corporation’s offices in Austin, Texas, and the roll was called of the duly constituted members of said Board, who are as follows:

<u>Name</u>	<u>Office</u>
William H. Dietz	Chairperson
Valerie Cardenas	Vice Chairperson
Courtney Johnson-Rose	Director
Andy Williams	Director
Lemuel Williams	Director

2. The officers of the Corporation (who are not Board members) are as follows:

<u>Name</u>	<u>Office</u>
David Long	President
Janie Taylor	Executive Vice President
Melinda Smith	Chief Financial Officer and Treasurer
Rebecca DeLeon	Secretary
Cynthia Gonzales	Assistant Secretary

All Board members were present except \_\_\_\_\_, thus constituting a quorum. All of the officers of the Corporation were present at the meeting.

3. Whereupon, among other business, the following written resolution (the “Resolution”) bearing the following caption:

RESOLUTION NO. 21-\_\_\_\_

TEXAS STATE AFFORDABLE HOUSING CORPORATION

“Presentation, Discussion and Possible Approval of a Resolution  
Authorizing the Texas State Affordable Housing Corporation to take

preliminary action to carry out the financing of The Park on 14<sup>th</sup> located in Plano, Texas, including creating entities, negotiating finance documents, and filing applications to obtain debt financing and invest equity in the Project”

was duly introduced for the consideration of said Board and read in full. It was then duly moved and seconded that said Resolution be adopted; and, after due discussion, said motion carrying with it the adoption of said Resolution, prevailed and carried by the following vote:

\_ AYES

\_ NOES

\_ ABSTENTIONS

4. That a true, full and correct copy of the aforesaid Resolution adopted at the meeting described in the above and foregoing paragraph is attached to and follows this certificate; that said Resolution has been duly recorded in said Board’s minutes of said meeting; that the above and foregoing paragraph is a true, full and correct excerpt from said Board’s minutes of said meeting pertaining to the adoption of said Resolution; that the persons named in the above and foregoing paragraph are the duly chosen, qualified and acting officers and members of said Board as indicated therein; that each of the officers and members of said Board was duly and sufficiently notified officially and personally, in advance, of the time, place and purpose of the aforesaid meeting, and that said Resolution would be introduced and considered for adoption at said meeting, and each of said officers and members consented, in advance, to the holding of said meeting for such purpose,

SIGNED this \_\_\_\_\_, 2021.

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Rebecca DeLeon, Secretary  
Texas State Affordable Housing Corporation

RESOLUTION NO. 21-\_\_\_\_

TEXAS STATE AFFORDABLE HOUSING CORPORATION

“Presentation, Discussion and Possible Approval of a Resolution Authorizing the Texas State Affordable Housing Corporation to take preliminary action to carry out the financing of The Park on 14<sup>th</sup> located in Plano, Texas, including creating entities, negotiating finance documents, and filing applications to obtain debt financing and invest equity in the Project”

WHEREAS, the Texas State Affordable Housing Corporation (the “**Corporation**”) has been duly created and organized pursuant to and in accordance with the provisions of Chapter 22 of the Texas Business Organizations Code, and under the authority of Subchapter Y of Chapter 2306, Texas Government Code, in each case, as amended;

WHEREAS, the Corporation will create a Texas limited partnership or limited liability company (the “**Owner**”), to acquire, construct, and equip a 62-unit multifamily housing project to be located at approximately the intersection of 14<sup>th</sup> Street and Avenue G, Plano, Texas, upon land currently owned by the Corporation, to be known as The Park on 14th (the “**Project**”);

WHEREAS, the Owner will be controlled by the Corporation;

WHEREAS, the Owner intends to apply for financing, including without limitation a HUD-insured 221(d)(4) loan in an amount not to exceed \$13,000,000 (the “**FHA Loan**”), HOME/TCAP funds from the Texas Department of Housing and Community Affairs in an amount not to exceed \$2,000,000 (the “**TDHCA Loan**”), and a grant or loan to reimburse eligible construction costs from the City of Plano in an approximate amount of \$500,000 (the “**City Funds**”);

WHEREAS, the Corporation intends to invest an equity contribution in an amount not to exceed \$5,000,000 (the “**Equity Investment**”) in the Project; and

WHEREAS, the Corporation may serve as a co-developer of the Project;

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Corporation (the “**Board**”):

Section 1. Authorization of the Participation in the Application. That the Board hereby authorizes the Corporation to participate in the filing of the Application for the Project.

Section 2. Authorization of the Formation of the Partnership and General Partner. That the Board hereby authorizes the Corporation to form the Owner entity and be admitted as a controlling entity in the Owner.

Section 3. Authorization of Financing Applications. That the Board authorizes the Corporation to execute such documents as may be required to apply for the FHA Loan, the



TDHCA Loan, and the City Funds, and any other financing sources that may be available to finance the Project.

Section 4. Authority of Equity Investment. That the Board authorizes the Corporation to invest the Equity Investment in the Project.

Section 5. Execution and Delivery of Certain Documents. That the Board hereby authorizes David Long, as the President of the Corporation, Janie Long, as the Executive Vice President of the Corporation, and any and all Board Members of the Corporation listed on the certificate accompanying this Resolution, to consent to, accept, execute and attest to formation documents and such other certificates, documents, instruments, letters of instruction, written requests and other papers, whether or not mentioned herein, as may be necessary or convenient to carry out or assist in carrying out the purposes of this Resolution, to the extent the President or Executive Vice President or any such Board Member concludes such documents are in the best interest of the Corporation.

Section 6. Ratification of Prior Actions. That all prior actions taken by or on behalf of the Corporation in connection with the matters described herein are hereby authorized, ratified, confirmed and approved.

Section 7. Purposes of Resolution. That the Board has expressly determined and hereby confirms that the matters described herein accomplish a valid public purpose of the Corporation.

Section 8. Conflicting Prior Actions. That all orders, resolutions, or any actions or parts thereof of the Board in conflict herewith are hereby expressly repealed to the extent of any such conflict.

Section 9. Effective Date. That this Resolution shall be in full force and effect from and upon its adoption.

APPROVED AND EFFECTIVE this \_\_\_\_ day of \_\_\_\_\_, 2021.

TEXAS STATE AFFORDABLE HOUSING  
CORPORATION

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William H. Dietz, Chairperson

ATTEST:

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Rebecca DeLeon, Secretary  
Texas State Affordable Housing Corporation



## Development Finance Programs

### Agenda Item

Presentation, Discussion and Possible Approval of a Resolution Authorizing the Texas State Affordable Housing Corporation to take preliminary action to carry out the financing of The Park on 14<sup>th</sup> located in Plano, including creating entities, negotiating finance documents, and filing applications to obtain debt financing and investing equity in the Project.

### Summary

In 2012, the Corporation purchased approximately 1.5 acres of land at the southwest corner of 14<sup>th</sup> Street and Avenue G in Plano as part of its Affordable Communities of Texas (ACT) program. The site is located near Plano's central business district and was acquired with the intent of redeveloping it for affordable multifamily housing. The Park on 14<sup>th</sup> (the Project) will include 62-units of one- and two-bedroom units targeted to families and individuals. Twelve units will be affordable to households earning up to 30% of the Area Median Income (AMI), one unit will be affordable to households earning up to 50% of the AMI and an additional 19 units will be affordable to household earning 80% of the Area Median Income. This equates to 51% of the total units reserved for low-income households. The remaining thirty units will be market rate units.

### Financing

The Project has been several years in the making and has attempted various financial strategies. In March 2015, the Corporation selected Diana McIver and Associates (DMA) through a request for proposals process, to assist us with the land development. In 2018 and 2019, DMA submitted competitive 9% Low-Income Housing Tax Credits Applications (9% HTC) through the Texas Department of Housing and Community Affairs (TDHCA), but the Project did not score high enough to receive an award in this competitive region. In 2020, we looked at the feasibility to issue private activity bonds with 4% Housing Tax Credits, but the Project was unable to line up the necessary community support due procedural changes at the City of Plano.

The total projected development budget for the Project is approximately \$14.5 million, or \$234,000 per unit. TSAHC currently owns the property and will continue to do so in perpetuity providing a property tax exemption to the Project. The value of land is not included in the development budget at this time. Construction costs, including contingency and contractor overhead sums to \$10.7 million. Soft costs for marketing, design, engineering and other activity totals \$1 million. Financing costs are estimated to be an additional \$800,000, with Developer fees totaling \$1.6 million and Reserves adding approximately \$400,000.

The proposed financing for the Project includes \$8.8 million from Mason Joseph, a multifamily lender, in the form of a Federal Housing Administration insured 221(d)(4) mortgage, deferred forgivable financing in the amount of \$1.2 million from the Texas Department of Housing and Community Affairs, \$300,000 in Tax Increment Financing administered through the City of Plano's Special Project Department and approximately \$4.2 million provided as owner equity from TSAHC. Staff is requesting approval to increase the loan amounts listed above in the event construction costs are higher than currently anticipated. Current underwriting from Mason Joseph would allow for a maximum loan amount of \$11 million, and staff is requesting for a higher cap specifically for this reason.

The use of TSAHC funds in the form of equity for the Project is one of the primary reasons staff is bringing this back to the board for consideration. Having struggled to obtain competitive housing tax credit over a two-year period, and difficulties with maneuvering through the City of Plano's new bond/HTC approval procedures led us to consider having TSAHC provide the equity directly. This path isn't unfamiliar to TSAHC, as the financing of the Rollins Martin apartments was wholly carried by TSAHC, without the use of loans or other sources of financing.

TSAHC's equity investment is anticipated to earn a yearly return on investment of at least 5% over the initial 15-year financing period of the Project. Additionally, at the end of the 15-year financing period, TSAHC will own a majority interest in the Project and thus any refinancing at a future date would provide additional capital benefits.

### **Building Design and Market Conditions**

The Park on 14th will be a small urban, elevator-served, community totaling 62 units in a single, 4-story, residential building with surface parking. Property management services will be provided by DMA.

All homes are one- or two- bedroom units accessed through a protected interior hallway. In terms of design standards, each apartment unit will include 9' ceilings, a full appliance package, washer/dryer hookups, ceiling fans, and a private patio with secured storage. The buildings will be designed to maximize energy efficiency, including dual pane insulating windows, insulation that exceeds code for walls and ceilings, and high SEER rated air conditioners.

The site benefits from close proximity to downtown Plano, the Downtown Plano DART Rail Station, Haggard Park, and multiple restaurants and retail stores. Occupancy rates and rental rates in the Project's primary market area have remained strong over the past few years, with overall stable rental rates. Policy Map data completed for this census tract indicates that rental housing demand is significantly greater in this census tract as compared to the City of Plano, in that 87% of households are renters which is over double the City's percentage of renters. Demand for rental housing remains strong as overall Plano multifamily vacancy is reported at 6.86% as of the second quarter 2021 showing continued improvement over the past several quarters.

### **Staff Recommendation:**

Staff recommends that the Board approve the Resolution Authorizing the Texas State Affordable Housing Corporation to take action to carry out the financing of The Park on 14th located in Plano, Texas, including creating entities, negotiating finance documents, and filing applications to obtain debt financing and investing equity.

## Tab 3

Presentation, Discussion and Possible Approval of the Guidelines, Scoring Criteria and Targeted Housing Needs for the Allocation of Qualified Residential Rental Project Tax Exempt Bonds under the Multifamily Housing Private Activity Bond Program Request for Proposals and the 501(c)(3) Bond Program Policies for Calendar Year 2022.

## Development Finance Programs

### Agenda Item

Presentation, Discussion and Possible Approval of the Guidelines, Scoring Criteria and Targeted Housing Needs for the Allocation of Qualified Residential Rental Project Tax Exempt Bonds under the Multifamily Housing Private Activity Bond Program Request for Proposals and the 501(c)(3) Bond Program Policies for Calendar Year 2022.

### Summary

In accordance with our governing statute, the Corporation releases annually a Request for Proposals (the “RFP”) and updated 501(c)(3) bond policies that comply with both state and federal requirements. The Corporation, pursuant to §2306.565 of the Texas Government Code, is also required to adopt targeted areas for the allocation of bonds, review relevant needs assessment information, adopt criteria regarding the solicitation of proposals, and set criteria for scoring and ranking of applications. The attached draft policies and RFP fulfill these statutory requirements.

Staff has conducted a review of several housing needs assessments including the State Low-Income Housing Plan, market research published by the Real Estate Center at Texas A&M University, and other resources. Additionally, staff monitored application procedures and public input during the past year and is recommending the following changes to the policies and RFP:

- Section 5, Application Review, has been re-written in its entirety. The significant increase in demand for private activity volume cap for multifamily developments has led to the submission of applications nearly one-year in advance of our annual allocation allotment. Therefore, staff is proposing changes that will allow us to better manage the pipeline of projects while maintaining our focus on meeting the unmet needs in affordable housing in Texas.
- Section 6(d), Compliance Threshold, is being updated to better tie into the Texas Department of Housing and Community Affairs compliance system. Applicants will need to submit proof that they are eligible to participate in housing tax credit program before receiving an inducement from TSAHC.
- Section 6(e), Resident Services Threshold, is being amended to provide more flexibility and allow properties to provide the services best suited for their tenants. TSAHC’s compliance staff has been shifting towards great flexibility for several years and now policies and RFP will reflect that. This change also eliminates the need for Appendix A.
- Section 6(f), Environmental Review, is being amended so that properties located in or near flood prone areas are reviewed prior to approval of an inducement. This detail is in line with the State’s housing tax credit program requirements and ensures that TSAHC will not be financing projects that place residents at significant risk to flood hazards.
- Section 6(m), Readiness to Proceed, is a new section being added to ensure that applications are prepared to move forward toward closing in a timely manner. It will allow staff to better manage our pipeline of projects and prevent a project from delaying other applicants from submitting reservation applications in a timely manner.
- Section 7(c), Income Range for Residents, is a scoring item that is being reworded based on input from recent transactions that utilized it. Based on staff and counsel’s comments during this project it was found that the proposed language was easier to manage for compliance staff, while maintaining the intent of the scoring item.

- Section 18, Termination for Cause, is a new section that incorporates an older subsection regarding the impacts to applicants that failed to comply with previous RFPs and adds limits to direct or Ex Parte communications with a member of the Board of Directors while an application is being reviewed and prior to an approval on the transaction. This language was modeled after the statutory limits on applicants to the housing tax credit program and has been reviewed by counsel.

No input was received during the public comment period. If approved, staff will accept all changes in the redlined version included with this agenda item and post the final RFP and policies to the Corporation's website.

**Staff Recommendation:**

Staff recommends that the Board approve the Guidelines, Scoring Criteria and Targeted Housing Needs for the Allocation of Qualified Residential Rental Project Tax Exempt Bond under the Multifamily Housing Private Activity Bond Program Request for Proposals and the 501(c)(3) Bond Program Policies for Calendar Year 2022, as presented. If approved, staff will accept all changes and post the final approved document.

# Texas State Affordable Housing Corporation

## Draft ~~2021~~2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

The Texas State Affordable Housing Corporation (the “Corporation”) has approved these policies and request for proposals (“RFP”) for its multifamily tax-exempt bond programs for calendar year ~~2021~~2022. These policies and RFP are updated annually to inform the public of the Corporation’s process and guidelines for selecting residential rental properties to be financed with tax-exempt bonds, or similar obligations (the “bonds”) issued by the Corporation. All submissions must be submitted for review of threshold and scoring criteria at least 35 days prior to any presentation to the Corporation’s Board of Directors (the “Board” or “Directors”) for an Inducement Resolution.

### 1. Introduction.

- a. The Corporation is a public nonprofit corporation that primarily serves the housing needs of low, very low and extremely low-income Texans and other underserved populations who do not have comparable housing options through conventional financial channels. The Corporation accepts applications from developers (“Developers”) to acquire and rehabilitate, or construct new affordable residential rental developments (“Developments”). Pursuant to §§2306.554, 564 and 565 of the Texas Government Code, the Corporation is authorized to issue qualified 501(c)(3) bonds and to direct the Texas Bond Review Board (the “TBRB”) on the issuance of the portion of the state’s private activity bonds ceiling set aside for the Corporation under §1372.0231(a) of the Texas Government Code. The Corporation’s available volume cap for private activity bonds is 10% of the State’s available volume cap for residential rental private activity bonds. For ~~2021~~2022, the amount is estimated to be approximately ~~\$80-85~~ million. This volume cap is available for reservation until August 14, ~~2021~~2022. Thereafter, the Corporation will be able to apply to reserve any additional available volume cap through the TBRB. There are no deadlines or sizing limitations on the amount of qualified 501(c)(3) bonds that the Corporation may issue.
- b. These policies and RFP have been adopted by the Corporation’s Board based on a review of the state’s strategic housing needs, the demonstration of local community support, and solicitation from local and regional housing organizations, pursuant to §2306.565 of the Texas Government Code. This RFP defines the methodology that staff will use to review applications and creates the criteria for scoring and ranking applications.
- c. This RFP will be extended month-to-month until such time as the Corporation chooses to close the RFP to further submissions, based on the amount of funds awarded or induced by the Board. A notice that the RFP has closed will be posted to the Corporation’s website, and written notice will be provided to any Developers who submit an application prior to the release of the closing notice. The Corporation reserves the right to re-open the RFP at any time.
- d. Contact Information. All questions about the RFP and application process can be directed in writing to:



# Texas State Affordable Housing Corporation

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## Draft ~~2021~~2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

Development Finance Program  
Texas State Affordable Housing Corporation  
6701 Shirley Avenue  
Austin, Texas 78752  
Tel. 512-477-3555, Fax 512-477-3557  
Email: [ddanenfelzer@tsahc.org](mailto:ddanenfelzer@tsahc.org)

2. **Targeted Housing Needs.** Pursuant to §2306.565(b) of the Texas Government Code, the Board has identified target areas of housing need within the State of Texas (“Targeted Housing Needs”) for the issuance of qualified residential rental project bonds. The Targeted Housing Needs are based on research conducted by the Corporation, including a review of the State’s strategic housing needs, relevant housing needs assessments and information from local and regional stakeholders. To this end, the Board has adopted the following Targeted Housing Needs. The Corporation will only accept applications in response to this RFP that fulfill at least one of the Targeted Housing Needs.
- a. *At-Risk Preservation and Rehabilitation.* The preservation and rehabilitation of existing affordable rental housing is defined as existing housing in need of significant structural repairs and mechanical systems updates. The housing currently has a recorded regulatory agreement or land use restriction agreement (the “LURA”) placed on it by a public body, or currently has rental rates below market value which make it feasible to convert and preserve as affordable housing. Rehabilitation activities must result in the housing units being brought up to current energy efficiency, housing quality, local building code and accessibility standards. Developments may include temporary tenant relocation expenses, but may not cause the permanent relocation of existing low-income tenants. Public housing developments participating in the U.S. Department of Housing and Urban Development’s Rental Assistance Demonstration program are eligible under this section;
  - b. *Rural and Smaller Urban Markets.* The Corporation is dedicated to expanding access to rental housing in rural and smaller urban markets that are not generally targeted for housing expansion. Rural rental housing Developments must be located within an area that is: (a) outside the boundaries of a primary metropolitan statistical area (PMSA) or metropolitan statistical area (MSA); or (b) within the boundaries of a PMSA or MSA, if the area has a population of 20,000 or less and does not share a boundary with an urban area. Smaller Urban Markets rental housing Developments must be located within a city of less than 150,000 persons; but not within or adjacent to a PMSA or MSA of more than 500,000 persons;
  - c. *Senior and Service Enriched Housing Developments.* Senior and Service Enriched Housing Developments must meet at least one of the following definitions in order to qualify under this Targeted Housing Need category.

# Texas State Affordable Housing Corporation

## Draft ~~2021~~2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

- i. A proposed Development that meets the requirements of the federal Fair Housing Act and: a) is intended for, and solely occupied by, individuals 62 years of age or older; or b) is intended and operated for occupancy by at least one individual 55 years of age or older per unit, where at least 80% of the total housing units are occupied by at least one individual who is 55 years of age or older; and where the owner publishes and adheres to policies and procedures which demonstrate an intent by the owner and manager to provide housing for individuals 55 years of age or older. (See 42 U.S.C. Section 3607(b));
  - ii. A proposed Development that provides for integrated, affordable and accessible housing that offers the opportunity to link residents with on-site or off-site services and supports that foster independence for individuals with disabilities and persons who are elderly. Such Developments should also show a clear effort to coordinate housing and health services for residents; or
  - iii. A Development financed in accordance with limitations set by the Internal Revenue Service on Assisted Living Developments, and a) is affordable rental housing combined with minimal on-site medical or supportive services; b) is targeted to persons with disabilities, but with at least 75% of units open to any qualified renter; and c) has at least 10% of its units affordable to persons earning less than 30% of the area median income.
- d. *Disaster Relief Housing*. The Corporation will consider any eligible multifamily residential rental housing Development, including rehabilitation and new construction, located in any one or more Texas counties identified in a Federal Emergency Management Agency disaster declaration to be eligible for financing under this RFP.
3. **Housing Needs Set-Aside**. To ensure that bonds will be available for specific housing needs, the Corporation has determined that until March 1, ~~2021~~2022, 20% of its annual available volume cap will be reserved for Developments that:
  - a. Include at least 50% of housing units located in a qualified Rural or Smaller Urban Market, as described by this policy; or
  - b. Include at least 20% of housing units built to be accessible for persons with mobility impairments and special needs populations as defined by this policy.
4. **Application Submission**. The Corporation will publish an application package to its website. Developers should download and complete the application pursuant to the guidelines for completion included in the application instructions. The Corporation requires a nonrefundable application submission fee of \$2,000 for private activity bonds or \$2,500 for 501(c)(3) bonds.
5. **Application Review and Management**.

# Texas State Affordable Housing Corporation

## Draft ~~2021~~ 2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

- a. The Corporation will accept applications on an ongoing basis starting on October 1, 2021 and until either 1) all of the anticipated private activity bond volume cap for 2022 has been allocated to applications with approved inducement allocations, or 2) until May 1, 2022. After May 1, 2022, the Corporation may reopen the acceptance window in order to either 1) accept applications for the State of Texas' annual private activity bond volume collapse or 2) to utilize volume cap freed up from previous applications that were not able to close.
- b. Each application will be provided a submission date (Submission Date) based on the date the complete application and all fees were received by the Corporation.
- c. The Corporation requires at least 28 days to review an application for threshold and scoring criteria, before any presentation to the Board for approval. All applications that have completed the review process and fulfill the Corporation's threshold and scoring criteria will be presented to the Board for consideration of the approval of an inducement resolution ("Inducement Resolution").
- d. The Corporation may delay the presentation of an application to the Board if there are errors, omissions or insufficient documentation that the Corporation deems necessary to complete its review. Once all errors, omissions or insufficient documentation have been corrected, the application will receive a new Submission Date. If an application fails to fulfill the minimum threshold and scoring criteria, the application will be terminated and will not be considered for further review.
- e. Once an Inducement Resolution is approved, Developments must be able to move forward with an application for a reservation of private activity bond volume cap within 90-days. If a Development cannot proceed within this timeline, the Corporation may assign the project a new submission date and place the application at the end of our application pipeline, behind applications submitted after the original submission date.
- f. The Corporation may require a Developer to withdraw and resubmit an application for reservation of private activity bond volume cap, if the Developer is unable to submit their application for 4% housing tax credits within 30-days of the date of issuance of the docket number for their reservation from the Texas Bond Review Board. This requirement allows for better management of the Corporation's pipeline and reduces the need to obtain new docket numbers later in the review and approval process.
- ~~a. The Corporation requires at least 28 days to review an application before presenting any recommendation for inducement to the Board. The Corporation will bring before the Board only those applications that have completed the review process.~~
- ~~b. The Corporation may delay the presentation of an application to the Board if there are errors, omissions or insufficient documentation that the Corporation deems necessary to complete its review. If an application fails to fulfill the minimum threshold criteria, the application will not be accepted by the Corporation for further review.~~

# Texas State Affordable Housing Corporation

## Draft ~~2021~~ 2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

- ~~c. All applications that have completed the review process and fulfill the Corporation's threshold and scoring criteria will be presented to the Board for approval of an inducement resolution ("Inducement Resolution").~~
- ~~d. Applications received after June 1, 2021, may be held by the Corporation for approval of an Inducement Resolution until October 2021, due to limitations on the availability of private activity bond volume cap after August 15, 2021.~~

6. **Threshold Criteria.** All applications submitted to the Corporation must meet the following minimum threshold criteria ("Threshold Criteria") in order to be considered for an issuance of bonds by the Corporation. Applications that do not meet the criteria listed below will be subject to termination by the Corporation.

a. *Affordability Threshold.*

- i. The Corporation seeks to provide housing to a mix of eligible households, including low, very-low and extremely-low income persons. Developers who are successful at receiving an award of private activity bonds shall agree to the following minimum terms and conditions through a Regulatory Agreement. At a minimum, all Developments will be required to meet the following income and rent restrictions:

- A. A minimum of twenty percent (20%) of the units in a qualified residential rental development must have gross rents that are restricted to households with incomes no greater than fifty percent (50%) of the area median income ("AMI"), adjusted for family size, or at least forty percent (40%) of the units in the Development must be affordable to persons and families with incomes at or below sixty percent (60%) of the AMI, adjusted for family size.

- B. Rent Restrictions. Gross monthly rent charged on an income restricted unit will not exceed 30% of the applicable AMI.

- ii. Affordability Requirements shall be maintained for the greater of 15 years or as long as the bonds are outstanding.

b. *Experience Threshold.* Developers must demonstrate sufficient experience in the development, ownership, and/or management of affordable housing. Developers must submit evidence that they have been involved in the development or ownership of the greater of 75 units or 50% of the total proposed Development units. The Corporation may only give credit for projects that are determined to be successful examples of affordable housing development, which includes properties in continuing operation, historically and currently in compliance, and any other factors that the Corporation determines to be relevant.

# Texas State Affordable Housing Corporation

## Draft ~~2021~~2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

- c. *Construction Threshold.* All Developments, new construction and rehabilitation, must adhere to local building codes and standards. If a Development is planned in an area or community that does not have local building codes, then the most recent and approved version of the International Building Code or International Residential Building Standards must be used. A certification from the Developer's architect, engineer or other third-party construction supervisor must be submitted prior to closing of the bonds or other obligations to be issued by the Corporation in connection with the financing. For Developments requiring rehabilitation of existing housing units, the Corporation will require the submission of a physical conditions inspection report and may conduct an onsite inspection of the property in order to complete its underwriting process. The Corporation may also suggest reasonable changes to the rehabilitation scope of work based on its inspection.
- d. *Compliance Threshold.* All Developments must adhere to the Corporation's Compliance Policies, which can be viewed on the Corporation's website at: [www.tsahc.org](http://www.tsahc.org). Developers and their affiliates will also be evaluated on prior compliance history with the Corporation's and any other state or federal affordable housing program. Developers who have completed projects involving housing tax credits within the State of Texas, must provide evidence that they have passed their most recent Previous Participation review and are considered in Category 1 or 2, pursuant to the Texas Department of Housing and Community Affairs multifamily program rules. The Corporation will require through its application process the submission of compliance information and references in order to evaluate a Developer's compliance history.
- e. *Resident Services Threshold.* The Corporation strives to maintain excellent resident services programs in the properties it finances. To meet this goal and better serve low-income tenants, Developers must maintain a sustained resident services program that provides at least six (6) approved services to tenants per quarter. Developers must ensure a dedicated budget for services, free transportation to services if off-site, and preferably on-site staff to direct services. The six (6) services ~~must be listed in~~ should be taken from the Corporation's Resident Services Program Guidelines, as identified in "APPENDIX A – TSAHC Resident Services Program Guidelines", or as approved by the Corporation. available on our website at: <https://www.tsahc.org/property-managers/compliance>
- f. *Energy Efficiency Threshold.* All Developments must adhere to the U.S. Department of Energy's Energy Star program standards, unless otherwise exempted by the Corporation. Developments, including either new construction or rehabilitation, shall meet these standards. Developers may obtain additional information regarding these standards directly from the Energy Star website: <http://www.energystar.gov>. This threshold must be certified to by the Developer's architect, consulting engineer, or other third-party energy efficiency consultant, prior to closing and based upon a review of the construction specifications or scope of work provided by the Developer's general contractor.

# Texas State Affordable Housing Corporation

## Draft ~~2021~~2022 Multifamily Tax-Exempt Bond Programs Policies and Request for Proposals

Additional incentives for Green Building methods and energy efficiency are included as scoring items.

- g. *Environmental Review Threshold.* Prior to closing, the Developer is required to conduct a Phase I Environmental Site Assessment. At or prior to the closing of the financing, the Developer will be required to provide an environmental indemnity in the form satisfactory to the Corporation. For properties located in a Flood Plain with 1-percent annual chance of flooding, as identified by the Federal Emergency Management Agency (FEMA), Developers must provide a mitigation plan drafted by the Development's engineer. The mitigation plan drafted by the project engineer must be submitted with the initial application and either 1) demonstrate that the project will be built so that all residential and common use buildings are 18 inches or more above the stated flood plain, or 2) that flood risks can be mitigated through automated systems.
- h. *Relocation Threshold.* All Developments involving the rehabilitation, reconstruction or demolition of existing housing must provide evidence that all tenants, lease holders, property owners and/or residents have been notified at least 30 days prior to the submission of the bond reservation application to the TBRB, that:
  - i. The Developer intends to rehabilitate, reconstruct or demolish existing housing units; and
  - ii. The Developer must ensure that tenants' rights under all federal, state and local housing laws are upheld, including but not limited to extended lease agreements, rental assistance, and relocation assistance.
- i. *Accessibility Threshold.* All Developments must be designed, built and rehabilitated to adhere with the Fair Housing Accessibility Standards, Title II and III of the Americans with Disabilities Act, and §2306.514 of the Texas Government Code. Developers are encouraged to review these guidelines with their architects and/or construction teams prior to application submission. All Developments will be required to obtain a certification from the project architect, engineer or contractor that the final construction plans and/or rehab plan will meet or exceed the above listed federal and state accessibility standards.
- j. *Community Support Threshold.* Developers are ~~encouraged~~required to collect community input on their Development proposals. All letters of support or opposition must be provided to the Corporation, as they are received. Developers must submit with their response to the RFP two (2) of the following documents in order to demonstrate community support for the proposed Development:
  - i. A letter of support from one or more of the following: Mayor; City Manager; City Administrator; Director of the Local Housing Finance Agency; Director of the Local Public Housing Agency; School District Superintendent; or County Judge, in the jurisdiction in which the Development is located;



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- ii. A resolution of support from the City Council, Local School Board or County Commissioner's Court. A resolution fulfilling the requirements for housing tax credits pursuant to section 2306.67021 of the Texas Government Code will be acceptable for this item;
  - iii. A letter of support from an affected neighborhood association, Chamber of Commerce or tenant council of a Development to be acquired;
  - iv. Evidence that a local government (city or county) entity is providing funding for the Development; and/or
  - v. A letter of support from the State Representative or Senator representing the district in which the proposed Development is located.
- k. *Underwriting Threshold.* The Corporation generally applies the same underwriting standards as required by the Texas Department of Housing and Community Affairs ("TDHCA"), to ensure consistency with the low-income housing tax credit underwriting process. The Corporation must receive all third-party reports, including but not limited to property condition assessments, environmental reports, market analysis and appraisals, that are required to be submitted to TDHCA. Additional minimum underwriting standards include:
- i. All Developments, and each property within a pooled transaction, must maintain a minimum Debt Coverage Ratio ("DCR") of 1.15 for a period of no less than 15 years as underwritten by the Corporation;
  - ii. The Corporation generally does not permit amortization periods of more than 40 years. The Corporation may consider longer amortization schedules for service enriched and extremely low-income housing developments;
  - iii. The Corporation will include a reserve for replacement expense of not less than \$250 per unit annually for new construction developments and \$300 per unit annually for rehabilitation developments in the operating expenses for each Development. The Corporation may require a higher reserve amount based on information provided in the Property Condition Assessment (the "PCA");
  - iv. Compliance fees will be included in the estimate of operating expenses and will include, at a minimum, the Corporation's Asset Oversight and Compliance Fee, as well as any fees required by TDHCA or other financial sources; and
  - v. The Corporation will include other reasonable and documented expenses, including, but not limited to, depreciation, interest expense, lender or syndicator's asset management fees, or other ongoing partnership fees in its underwriting analysis. Lender or syndicator's asset management fees or other ongoing partnership fees will not be considered in the calculation of debt coverage.

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**l. Property Tax Exemption.** Developers must certify that they will, or will not, apply for a property tax exemption or payment in lieu of taxes (“PILOT”) agreement to reduce the property taxes due to local taxing entities. If a Developer agrees not to apply for a tax exemption or PILOT agreement, the Corporation will require a restriction to be added to the financing documents that prohibits any future application for exemption. If a Developer states that they will or may apply for a tax exemption or PILOT agreement, the Corporation will require a notification to the local tax appraisal district, school district superintendent and the County Judge where the Development is located that such an exemption or agreement will be requested. Developers will also be required to submit confirmation of any exemptions or final agreements to the Corporation.

**m. Readiness to Proceed.** Developers must be able to demonstrate that the proposed Development is ready and able to move forward with the proposed financing. To do so the following documents are required to be submitted with the application.

- i. A letter from the Developer’s counsel stating that there are no known lawsuits or other legal actions against the Developer, Developer’s affiliates or involving the proposed Development site;**
- ii. A copy of the application, letter of intent or term sheet from the proposed bond purchaser, underwriter, or originator. Letters of intent or term sheets from the proposed tax credit equity purchaser must be submitted prior to submission of an application for reservation of private activity bond volume cap**

**n. Public Benefit Threshold for 501(c)(3) Bonds Only.** Pursuant to §2306.563 of the Texas Government Code and this Policy, the Corporation requires that all nonprofit organizations that receive an issuance of qualified 501(c)(3) bonds must invest at least one dollar in projects and services that benefit income-eligible persons for each dollar of property taxes that is not imposed on the Development as a result of a property tax exemption received under §§11.182 and 11.1825 of the Texas Tax Code. Projects and services must benefit income-eligible persons in the county in which the Development supported with the tax exemption is located and must consist of: (1) rent reduction; (2) capital improvement projects; or (3) social, educational, or economic development services, referred to hereafter as qualified public benefits (“QPB”). The Corporation has determined that the following guidelines are reasonable for the calculation and accounting of QPB:

- i. The Corporation shall require the value of any property tax exemption to be included in the operating budget of the Development and escrowed with the Trustee in an account (the “QPB Account”) prior to the repayment of any debt, management fees, performance fee, or any other fees that the Corporation determines relevant. The QPB account may be funded in advance with funds withdrawn for repayment of QPB activities, or may be included on the operating ledger as an account payable with QPB expenditures credited against the balance.**



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On or before January 1st of each calendar year starting after the closing of the bonds, the Developer shall provide to the Corporation an estimate of the value of property tax exemption for that calendar year based on the appraised value provided to the Development by the county tax appraiser where the Development is located. The balance of funds to be escrowed or credited in the QPB Account may be reduced each month in an amount equal to the value of QPB expended by the Development each month. In the event that the QPB Account has a balance of funds existing, or owed as an account payable, if applicable, at the end of the calendar year the Developer or its guarantors shall advance the balance to the appropriate taxing entities on a pro rata basis. The QPB Account imposed by this section will be reduced by an amount equal to each dollar that, in lieu of taxes, a Developer pays to a taxing unit for which the Development receives an exemption prior to the end of the calendar year.

- ii. The Corporation has determined that the value of QPBs will be calculated in the following manner:
  - A. The value of rent reductions will be calculated using the difference between the most recent fair market rent (the “FMR”) published by the U.S. Department of Housing and Urban Development (the “HUD”) and the actual rent collected in each lease agreement. This includes rent concessions granted to households upon move-in, but not the absence or forgiveness of deposits. Rent reductions must be accounted for on a monthly basis, documented in each individual lease agreement that receives the benefit, and a notice given to each resident of the annual value of their rent reduction. Units that receive rental assistance payments of any kind are excluded from rent reduction calculations.
  - B. The value of capital improvements will be determined on a case-by-case basis for each Development and be specific to each Development or property within a pooled transaction. Capital improvement costs will not include regular maintenance, general repairs, or make ready costs associated with the daily operations of the Development. The Development may include the cost of rehabilitation to be completed as part of the issuance of new 501(c)(3) bonds or approved capital improvements paid for with proceeds from grants, tax credit equity, bond proceeds, loans or other forms of taxable debt, and may amortize the cost of those capital improvements over a five (5) year period. The repayment of taxable debt for capital improvements pursuant to this section B that actually reduces the equivalent amount of such taxable debt payable will be paid out of escrowed funds or credited against the QPB Account. Capital improvements may not account for more than 75% of the total annual QPB requirement.

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- C. The value of social, educational, or economic development services may be based on (1) the actual dollar amount expended by the Development towards such services at the time such services are provided to residents; (2) the value of volunteer services provided and coordinated by the Developer or its affiliates; and (3) the cost saving provided to tenants through services such as free on-site day care, free after school care and free lunch programs. The Development may only include the cost of services approved by the Corporation and must not include the value or cost of services provided to residents free of cost by third party entities.
  - iii. The Corporation will require each Developer to certify that the Public Benefit Threshold has been met in accordance with this policy, and any future revisions of this policy, in their annual audit, to be filed with the Corporation within 120 days of the beginning of each fiscal year of the Development.
7. **Scoring.** Pursuant to §2306.565(e) of the Texas Government Code, the Corporation's Board has adopted the following criteria to score and rank applications to the PAB program. The first three scoring criteria are required by state statute. The remaining criteria support the Corporation's goals to target specific housing needs and underserved areas in the state. Applicants must achieve a minimum score of 50 points.
- a. *Cost Per Unit of Housing.* Applications may receive up to 15 points for proposing housing developments with total residential costs within the following ranges:
    - i. 15 points for:
      - A. Acquisition and rehabilitation costs equal to or less than \$~~115,000~~150,000 per unit
      - B. New construction costs equal to or less than \$~~140,000~~160,000 per unit; or
    - ii. 8 points for:
      - A. Acquisition and rehabilitation costs equal to or less than \$~~125,000~~180,000 per unit
      - B. New construction costs equal to or less than \$~~160,000~~190,000 per unit; or
    - iii. 15 Points for rehabilitation costs that exceed \$~~3040~~,000 per unit in projects that meet the At-Risk Preservation and Rehabilitation Targeted Housing Need.
  - b. *Proposed Rents.* Applications may receive up to 15 points for proposing Developments that ensure a percentage of rents are affordable to very low and extremely low-income households. Developments supported by project based rental contracts may not include units supported by project-based subsidies in the calculation of the following set-aside selections:

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- i. 15 points – at least 5% of units will be reserved for families who earn 30% or less of the area median income without project based rental subsidy; or
  - ii. 10 points – at least 40% of units will be reserved for families who earn 50% or less of the area median income without project based rental subsidy.
- c. *Income Range for Residents*. The Corporation is interested in promoting mixed income housing as a means to improve the lives of residents and build stronger communities. Applications that propose to ensure the following mixed income guidelines will receive 15 points:
  - i. ~~Not more than 80% of the housing units will be reserved for persons earning 60% or less than the area median income~~At least 20% of the total number of housing units will be available to person earning more than 60% of the area median income; or
  - ii. At least 15% of the total number of housing units will be reserved for persons earning between 80% and 120% of the area median income.
- d. *Small and Mid-sized Cities*. Applications will receive 10 points for Developments located in communities with populations less than 150,000 but not located adjacent to a PMSA or MSA with a total population of more than 500,000; or within the boundaries of a PMSA or MSA, if the area has a population of 20,000 or less and does not share a boundary with an urban area.
- e. *At-Risk Preservation*. Applications will receive 10 points for the acquisition and rehabilitation of Developments with current affordable housing rental contracts or land use restrictions. Applicants must demonstrate that the current rental voucher contract or land use restriction agreement (“LURA”) will be extended for at least 15 years from the date of closing.
- f. *Green Building Features*. Applications will receive 10 points for obtaining a certification from a qualified third party that the Development meets either:
  - i. The minimum certification requirement of the U.S. Green Building Council’s LEED (“LEED”) program: or
  - ii. The Development achieves an Energy Star score for multifamily developments of 70 or higher.

Applications will receive an additional 5 points (maximum of 15 points for this criterion) for meeting the Gold or Platinum certification standards for the LEED program, or an Energy Star score for multifamily development of 80 or higher. Certification may be based on the proposed construction plans, and the Development must obtain an official certification after completion of construction or rehabilitation.

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- g. *Accessible Housing Features.* Applications, including those for rehabilitation developments, will receive 10 points for certifying that the Development will meet the following housing accessibility standards:
- i. All housing units accessible through a ground floor entrance must have at least one no-step entry with a 36" entrance door;
  - ii. All housing and community spaces will be accessible via pathways that meet ADA and Fair Housing accessibility standards;
  - iii. All doorways in ground floor units (including closets, bathrooms, storage areas, etc.) must have doors with at least a 32-inch clear opening;
  - iv. All doors must have lever handles and windows shall have accessible release and opening mechanisms;
  - v. All ground floor units must have at least one ground floor bathroom with an accessible bath tub or roll-in shower, and at least one ground floor bedroom;
  - vi. All electrical outlets, switches and control panels must be no higher than 48 inches and no lower than 15 inches; and
  - vii. All ground floor units must have kitchens that are accessible pursuant to the Fair Housing Accessibility Guidelines.
- h. *Local Public Funding.* Applications will receive 10 points for providing evidence that a commitment of financial support of at least \$250 per unit has been made by a unit of government to the proposed development. The only qualifying units of government will be Counties, Cities, Municipal Utility Districts, and Councils of Government. The Corporation considers fee waivers, grants and loans as financial support.
- i. *Letters of Local Support.* Applications will receive 15 points for submitting at least four letters of support from any combination of the following persons: Mayor; City Manager; County Judge; School District Superintendent; State Representative; or State Senator, whose district includes the Development site.
- j. *Developer Experience.* Applications will receive 5 points for providing evidence that the Developer currently owns, and maintains in compliance, a number of multifamily housing units at least twice the amount proposed in the Application.
- k. *Resident Services.* Applications will receive 10 points for agreeing to provide at least four (4) approved services to tenants on a monthly basis. This scoring criterion is a higher standard than the Corporation's threshold criteria for resident services.
- l. *Tie Breaker.* The Corporation will break all scoring ties by dividing the estimated total development cost per unit by the number of very low and extremely low-income units. The application with the lowest ratio will be determined the winner of the tie break.

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8. **Subsequent Filing Requirements.** Prior to final approval of the bonds of other obligations by the Board or the TBRB, Developers may be required to file such additional documents or statements in support of their Development as may be considered relevant and appropriate by the Corporation, which may include but are not limited to:
- a. Such additional information as requested by the Corporation's Municipal Advisor, Bond Counsel, or Issuer's Counsel;
  - b. A draft of any term sheet, official statement, prospectus, or other offering memoranda through the use of which the proposed obligations are to be offered, sold or placed with a lender, purchaser, or investor, which offering, sale or placement materials must contain prominent disclosure substantially to the effect that:
    - i. Neither the Corporation nor the State has undertaken to review or has assumed any responsibility for the matters contained therein except solely as to matters relating to the Corporation and to a description of the obligations being offered thereby;
    - ii. All findings and determinations by the Corporation and the State, respectively, are and have been made by each for its own internal uses and purposes in performing its duties under the legislation enabling the Corporation and this RFP;
    - iii. Notwithstanding its approval of the obligations and the Development, neither the State nor the Corporation endorses or in any manner, directly or indirectly, guarantees or promises to pay such obligations from any source of funds of either entity or guarantees, warrants, or endorses the creditworthiness or credit standing of the Developer or of any Guarantor of such obligations, or in any manner guarantees, warrants, or endorses the investment quality or value of such obligations; and
    - iv. Such obligations are payable solely from funds and secured solely by property furnished and to be furnished and provided by the Developer and any Guarantor and are not in any manner payable wholly or partially from any funds or properties otherwise belonging to the Corporation or the State.

9. **Public Hearings and Meetings.**

- a. The Corporation's Board, at its own discretion, may ~~call~~require any Developer ~~to a scheduled to attend a~~ meeting to review the Developer's experience, qualifications, and/or the characteristics of a Development.
- b. The Corporation requires the Developer or a representative of the Developer, to attend public hearings where a Development is proposed. If the Development includes multiple sites in several cities, the Corporation will conduct the hearing at a location central to all development sites. All public hearings must be held prior to the final approval of the resolution authorizing the issuance of the requested debt by the Corporation's Board.

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- c. With respect to public hearings required by Section 147(f) of the Internal Revenue Code and the related regulation (“TEFRA”), the Corporation will plan and post notice, at the expense of the Developer, of the hearing in the *Texas Register* and on the Corporation’s website at least seven (7) days prior to the planned TEFRA hearing. The Corporation will schedule an appropriate date, time and location for TEFRA hearings based on the schedule of publication.
- d. The TEFRA Hearing may not be held (and notice of such Hearing may not be published) prior to the date the Corporation approves the Inducement Resolution; provided, however, that such hearings may be scheduled and posting of the hearing notice may be prepared prior to selection as long as (a) the Corporation’s staff determines that such action is appropriate, (b) the hearing and publication of notice do not actually occur until after selection by the Corporation, and (c) the Borrower provides the deposit to the Corporation set forth herein.

### 10. Awards and Reservation of Volume Cap.

- a. Once the Corporation has approved an Inducement Resolution for a Development, the Corporation and its Bond Counsel will work with the Developer to prepare and time the submission of the application to reserve volume cap (Reservation Application) to the TBRB;
- b. Applications approved for Inducement for the Corporation’s ~~2021~~2022 allocation of private activity bonds will have until May 1, ~~2021~~2022 to notify the Corporation and its Bond Counsel they are prepared to move forward with a Reservation Application. Those not prepared to move forward, will be placed to the back of the list of Inducement Resolutions, and must be prepared to submit a Reservation Application within one year from the date of Inducement or the Corporation, in its sole determination, may terminate the award.
- c. In the event the Corporation has approved Inducement Resolutions in excess of its annual allocation, a Developer may choose to submit their Reservation Application to the TBRB to be considered for allocation on or after August 15, ~~2021~~2022, pursuant to Section 1372.022 of Texas Government Code. The Corporation cannot ensure the availability of private activity bond volume cap on or after August 15, ~~2021~~2022.
- d. The Corporation reserves the right in its sole discretion to modify, suspend or amend this program at any time, with or without further notice to any interested party. All costs incurred in the response or application process are the sole responsibility of the Developer. All decisions of the Corporation are subject to such additional conditions, restrictions and requirements as determined by the Corporation in its sole discretion. In addition, the Corporation’s selection of proposed Developments for possible issuance of private activity bond cap is subject to final approval by the TBRB.

### 11. Bond Review Board Approval.

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- a. Bonds or similar obligations issued by the Corporation are subject to approval by the TBRB. TBRB rules provide an optional exemption from the formal approval process for the Corporation's multifamily conduit transactions unless such transactions involve an ad valorem tax reduction or exemption. If no ad valorem tax exemption or reduction is requested with respect to the Development, the formal TBRB approval process may not be required. However, if one or more TBRB members request it, the formal TBRB approval process must be followed. If so, representatives of the Developer are expected to attend the TBRB planning session and the TBRB meeting at which the Development will be considered for approval. Additional information may be requested by TBRB members, and the Developer's cooperation in providing this information is required.
  - b. If the formal TBRB approval process is required, the Corporation, with the assistance of its Bond Counsel, will prepare and file the notice of intent and the TBRB Application for the Development. The Corporation will file the notice of intent and the TBRB Application with the TBRB only if it has timely received all required information and documentation for the completion of the TBRB Application from the Developer and/or its consultants.
12. **Fees.** Developers shall be responsible for fees and expenses incurred as a result of bonds or other obligations issued on their behalf (the "Cost of Issuance"). Up to two percent (2%) of the Cost of Issuance may be financed through tax-exempt obligation proceeds and will be considered part of the obligations authorized for issuance by the Corporation, where eligible under the federal tax code. Developers shall commit to pay from other sources any Costs of Issuance not payable from tax-exempt obligation proceeds. The following fees are payable at the times and in the amounts as described below. ALL FEES ARE NONREFUNDABLE, EXCEPT AS OTHERWISE PROVIDED HEREIN.
- a. *Application Fee.* Developers shall submit a nonrefundable fee of \$2,000 for Private Activity Bonds or \$2,500 for 501(c)(3) bonds, made payable to the Corporation, upon submission of the Application.
  - b. *Inducement Fee.* Developers shall pay a fee of \$8,000, and an additional \$1,000 for each property for Developments involving more than one (1) site, to cover expenses related to public hearings and the Reservation Application to the TBRB, within five (5) business days of the date the Inducement Resolution is approved by the Corporation's Board. Additional reimbursements for expenses related to public hearings and application for private activity bonds may be requested by the Corporation.
  - c. *Professional Fee Deposit.* Following the issuance of a reservation for volume cap from the Bond Review Board, Developers shall make a deposit with the Corporation which will be credited against fees and expenses incurred by the Corporation for the services of Bond Counsel, the Municipal Advisor and Issuer's Counsel in connection with the proposed financing. Such deposit shall be ~~\$3040~~,000, which represents a ~~\$2025~~,000 deposit for Bond Counsel fees, a \$5,000 deposit for Financial Advisor's fees, and a ~~\$510~~,000 deposit for Issuer's Counsel fees (collectively, the "Professional Fee Deposit"). If the accrued fees



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and expenses of Bond Counsel, the Municipal Advisor and/or Issuer's Counsel exceed the amount of such Professional Fee Deposit, the Corporation may require the Developer to submit an additional deposit payment. The balance of any Professional Fee Deposit remaining after a transaction has failed to close and has been withdrawn from consideration, less a processing fee of \$500.00, will be refunded to the Developer.

- d. *Corporation Expenses.* Developers shall reimburse the Corporation for all costs and expenditures incurred by the Corporation that exceed the Corporation's application and inducement fees paid to the Corporation by the Developer during the review, issuance and closing of a Development. Such expenditures include but are not limited to (i) on-site visitation of multifamily residential developments to be financed (or the site[s] therefore), (ii) any reports deemed necessary or appropriate by the Corporation and not otherwise provided by the Developer, (iii) all costs and expenses (including travel and related expenses) of conducting public hearings and related meetings [described herein] and (iv) such other activities, inspections and investigations as are deemed necessary or appropriate by the Corporation in connection with its determination of the suitability of the proposed Development for financing assistance to be offered by the Corporation. The Corporation will include any of the above expenditures in its closing fees estimate prior to the closing date.
- e. *Municipal Advisor Fees.* The fee to be paid to the Corporation's Municipal Advisor, acting as a financial advisory to the Corporation for its issuance of debt transactions issued for the multifamily bond program, will be \$10,000 plus \$2.00 per \$1,000 of bonds issued, plus actual expenses, unless otherwise agreed to by the Corporation's Municipal Advisor. In addition, for an additional fee the Corporation's Municipal Adviser will also serve as the bidding agent with respect to all investment contracts to be entered into in connection with the investment of bond proceeds and revenues of the Developments. If the financing structure proposed by the Developer requires non-standard services to be performed by the Municipal Advisor or involves unique financing features including, but not limited to, multiple sites or complexes in a project, extreme credit quality concerns, hedge agreements, swap agreements, or trust structures, the fees to be charged by the Municipal Advisor will be subject to adjustment. Any such adjustment must be agreed to in writing by the Developer before the submission of the Reservation Application to the TBRB.
- f. *Bond Counsel Fees.* Developer shall pay the fees of Bond Counsel, which will be determined based on the structure of the transaction but which will generally range from .75% to 1.5% of the par amount of the financing with a minimum fee of \$50,000. All expenses incurred by Bond Counsel in connection with the Development will also be paid by the Developer. Bond Counsel shall receive an initial payment of \$20,000 in advance upon submission of the Development's Reservation Application to the TBRB, which will be credited towards the final amount due Bond Counsel. Bond Counsel may request additional reimbursement of actual hourly costs or expenses from time to time directly



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from the Developer. Expenses include TEFRA notice publication, print or document publication, public hearing notices, Attorney General filing fees, and the preparation and filing of the TBRB Applications, printing and supplements thereto.

- g. *Issuer's Counsel Fees.* The fee to be paid to Issuer's Counsel will be based upon the hourly rate in effect for the applicable period with the Corporation. In some instances the fees due to Issuer's Counsel can be based on a fixed fee approved by the Corporation.
- h. *Closing Fees.* Concurrently with the closing of the financing, the Developer shall pay or cause to be paid all fees and expenses in connection with the issuance of the obligations including Bond Counsel Fees, Municipal Advisor Fees, Issuer's Counsel Fees, TBRB Fees, and the actual amount of any closing or acceptance fees of any trustee for the obligations, any fees and premiums for casualty and title insurance, any security filing costs, any fees for placing the obligations, any fees and expenses of any compliance agent appointed in connection with the review of any property, any out-of-pocket expenses incurred by professionals acting on behalf of the Corporation, and any other costs and expenses, including issuance expenses, relating to the obligations, their security, and the Development. Additionally, the Corporation will receive a Closing Fee of fifteen basis points (0.15%) of the principal amount of obligations issued, with a minimum closing fee of \$20,000.
- i. *Administrative Fee.* Until the final maturity of the obligations, the Developer will pay an annual Administrative Fee, remitted through the respective bond trustee to the Corporation as designated by the Corporation, equal to ten (10) basis points (.10%) of the aggregate principal amount of the obligations outstanding, with a minimum annual fee of \$5,000. The first annual payment of the Administrative Fee must be paid at closing. The Administrative Fee is exclusive of the trustee's fee, compliance agent fee, rebate analysts' fee, asset-oversight management fee, audit fee, independent analyst fee, and any other costs or extraordinary costs as permitted under the respective bond documents. Payment of the Administrative Fee is to be covered by the bond credit enhancement and/or secured under the first mortgage on the property assigned to the bond trustee. The Corporation may require the payment of the Administrative Fee to be guaranteed by the Development owner and/or general partner(s).
- j. *Trustee's Fees.* The Developer shall select a bond trustee from a list of bond trustees approved by the Corporation to administer the funds and accounts pursuant to the trust indenture between the Corporation and the trustee bank. All trustee fees and expenses, including fees of trustee's counsel, will be approved by the Corporation and must be paid by the Developer.
- k. *Auditor's Fees.* The Corporation may, at any time, over the life of the Development appoint an auditor to review the financial transactions under the bond documents, a compliance agent, and a rebate analyst to perform an analysis of rebate requirements with respect to the issue. Such fees and costs must be paid by the Developer.

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- I. *Continuing Costs.* Developers shall pay to the Corporation, in the manner described in the Development documents, the following amounts:
    - i. An annual asset oversight and compliance fee equal to the greater of \$45 per unit or \$2,500 for each property included in the Development (as such fee may be adjusted in accordance with the Asset Oversight and Compliance Agreement). The Corporation may require the owner of the Development and/or related entities or persons to guarantee the payment of these fees;
    - ii. Any amounts payable pursuant to any indemnity contract or agreement executed in connection with any financing by the Corporation completed as herein contemplated, and
    - iii. The amount allocable to each Developer (whose financing has been completed) of costs and expenses incurred by the Corporation in the administration of the indemnity contract or agreement, any program established in connection with the financing of a Development, and any obligations of the Corporation, including an annual accounting and/or audit of the financial records and affairs of the Corporation. The amount of costs or expenses paid or incurred by the Corporation under this clause will be divided and allocated equally among all Developers whose financings have been completed.
  - m. *Changes in Fees.* The Corporation reserves the right at any time to change, increase or reduce the fees payable under this RFP. All fees imposed subsequent to closing by the Corporation under this RFP will be imposed in such amounts as will provide funds, as nearly as may be practical, equal to that amount necessary to pay the administrative costs of conducting the business and affairs of the Corporation, plus reasonable reserves therefore.
  - n. *Failure to Timely Pay Fees and Costs.* The Corporation will not consider submissions for future transactions proposed by Developers who are delinquent in the payment of any fees described herein.
13. **Document Preparation.** Bond Counsel will have the primary responsibility for the preparation of the legal instruments and documents to be utilized in connection with the financing of the Development by the Corporation. No bonds or other obligations will be sold or delivered unless the legality and validity thereof have been approved by Bond Counsel and the Attorney General of the State of Texas. The Developer and its legal counsel shall cooperate fully with Bond Counsel, the Municipal Advisor, the Issuer's Counsel and the Corporation's agents in the preparation of such materials.
14. **Material Changes to Financing Structure.** Any and all material proposed changes to the financing structure, ownership of the Development, or scope or materials of or for the Proposed Development, from that set forth in the application must be disclosed to the Corporation immediately in writing and approved by the Corporation.

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15. **Time Limits.** In the event that the Development does not close within the time frame established by the Corporation, the Corporation reserves the right to terminate its participation in the financing.
16. **Final Approval by the Corporation.** The Corporation's Board will consider final action on the Bonds after the completion of the public hearings and upon recommendation by the Corporation's staff. If approved, the Board will adopt a resolution, in such form as is recommended by Bond Counsel, authorizing the issuance of obligations to provide financing for the Development. Final approval will be granted only upon:
- a. Receipt by the Board of evidence satisfactory to it that the Developer has complied in all material respects with this RFP not otherwise waived by the Board; and
  - b. An affirmative determination of the Board that:
    - i. All requirements for and prerequisites to final approval under this RFP have either been satisfied or waived and are in form and substance satisfactory to the Board; and
    - ii. The operation of the Development(s) will constitute a lawful activity, is qualified for approval by the State, complies with and promotes the purposes of the Corporation and satisfies the requirements of the Corporation.
17. **Closing of the ~~Development~~Financing.** Following the public hearing(s) and final approval by the Corporation and the TBRB, ~~if necessary~~, the Corporation will proceed to close the financing in accordance with the documents approved by the Corporation and when finally approved by the Texas Attorney General and Bond Counsel in accordance with the terms of the sale or placement.
- a. *Structure of Bond Sale.* Developers shall be responsible for determining the structures of the sale of bonds, but are encouraged to consult with the Corporation's Municipal Advisor and Bond Counsel for information regarding the structure of contemplated bond transactions in Texas. Developers are required to execute an agreement in connection with awarding the sale of the Corporation's obligations to an underwriter or to an institutional purchaser through a private placement that obligates the Developer to the payment of the costs of issuing such obligations as more fully described herein.
  - b. *Public and Limited Offering Requirements.*
    - i. All bonds to be sold publicly, whether by competitive bid or negotiated sale, must have a debt rating the equivalent of at least an "A-/A3" rating assigned to long-term obligations by a nationally recognized rating agency acceptable to the Corporation. Bonds with an investment grade of "A-/A3" or higher may be sold in minimum denominations of \$5,000,
    - ii. The Corporation will consider any bonds with rating lower than "A-/A3" to be non-rated obligations. Non-rated obligations must be sold in minimum denominations

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of at least \$25,000 and in integrated multiples of any amounts in excess of \$25,000.

- iii. All non-rated obligations must be privately placed or offered on a limited basis with transfer and other restrictions. In order for a non-rated transaction to be considered by the Corporation, the placement must comply with the following minimum requirements: (i) the sale must be made to a “qualified institutional buyer” as defined in Rule 144A of the Securities Act of 1933 (a “QIB”) or an “institutional accredited investor” as defined in Rule 501(a)(1), (2), or (3) of Regulation D under such act (an “Institutional Accredited Investor”) and cannot be an underwriting or purchase with an intent to resell any portion of the obligations, (ii) the obligations must be issued in minimum denominations of not less than \$25,000 and integral multiples of any amount in excess thereof, and (iii) at such time as the bond financing is presented to the Corporation for final approval, (a) the Developer (or placement agent, if applicable) must identify the Purchaser of the obligations, (b) the Developer (or placement agent, if applicable) must provide a written commitment from the Purchaser in form and content customarily used by real estate lending institutions outlining the terms and conditions of such commitment to purchase the obligations, (c) the Purchaser must represent that it is in the business of originating, or acquiring and owning for its account, tax-exempt bonds or mortgage loans on multifamily rental housing properties, (d) when a placement agent is involved in the sale of the obligations, there may be a placement memorandum prepared by the agent for the Purchaser, but there will be no offering statement by the Corporation, and (e) the Corporation may require that one physical obligation be issued with a legend stating that the initial and any subsequent purchaser(s) of such bond shall be a QIB or an Institutional Accredited Investor, as applicable. In the case of a private placement transaction, the Developer or placement agent, upon delivery of the obligations, shall provide the Corporation with an executed investment letter from the investor purchasing the obligations substantially to the effect that: (1) it is engaged in the business, among others, of investing in tax-exempt securities and is a QIB or an Institutional Accredited Investor, as applicable; (2) it has made an independent investigation into the financial position and business condition of the Developer and therefore waives any right to receive such information; (3) it has received copies of the financing documents pursuant to which such obligations are issued, and (4) that it has purchased the obligations for its own account and not with the intent to sell them. A complete form of such investment letter will be provided by the Corporation.
- c. Any variation to the requirements set forth above must be requested in writing by the Developer and must be approved by the Corporation and be acceptable to the Bond Counsel, Municipal Advisor, and Issuer’s Counsel.

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- d. *Required Approvals.* No Developer, or any representative of any Developer or the Corporation, shall represent, directly or indirectly, to any lender (interim or otherwise) supplier, contractor, or other person, firm, or entity that the Corporation has agreed or is firmly committed to issue any obligations in relation to any Development or Response or Reservation Detail until the Board has given final approvals for the issuance thereof under this RFP, and then subject to the governmental approvals required by this RFP and the approval of the Attorney General of the State of Texas, the approval of Bond Counsel and subject to any requirements imposed by the Corporation's Articles of Incorporation.
- e. *Offering Statement.* No Developer, or any representative of the Developer or the Corporation, shall make any representation, directly or indirectly, express or implied, of any fact contrary to the disclosures required to be made by this RFP.
- f. *Registration.* Neither the Developer nor any securities firm, underwriter, broker, dealer, salesman, or other person, firm, or entity shall offer, sell, distribute, or place any obligations authorized by the Corporation by any process, method, or technique or in any manner, transaction, or circumstances or to any person or persons, the effect of which would be to require such obligations to be registered or would require filings to be made with regard thereto under the laws of the state or jurisdiction where such offer, sale, distribution, or placement is made without first registering the same or making the filings regarding the same required by such laws.
- g. The Developer will provide and be responsible for filing so long as it is obligated to make payment to the Corporation in support of the bonds, notes or other obligations issued by the Corporation for a project being financed for the Developer, all information required to satisfy the requirements of Rule 15c(2-12) of the United States Securities and Exchange Commission as that rule is applicable to the financing.

### **18. Termination for Cause.**

The Corporation may terminate an Application, or deny the acceptance of any Application, if one or more of the following conditions has occurred or is occurring:

- a. *Failure to Comply with previous RFPs.* The Corporation will not consider submissions from Developers for a potential Development if the Developer is a borrower (or a related party thereto) in connection with obligations previously issued by the Corporation and such borrower (or related party) is not in compliance with the requirements set forth in the Corporation's policies and procedures with respect to such previously issued obligations or is delinquent in the payment of any fees or costs with respect to such previously issued obligations of the Corporation; or
- ~~18.b.~~ *Ex Parte Communications.* The Corporation may terminate an Application or refuse to consider submissions from a Developer, if the Developer or any related party thereto, attempts to communicate either verbally or through written means with a member of the Corporation's Board after the submission of an Application, while the

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Application is being reviewed, or prior to any decision about the Application by the Board. This excludes communications during any board meeting or public hearing held with respect to the Application, but not during a recess or other nonrecorded portion of the meeting or hearing. For any Application involving the allocation of low-income housing tax credits, any violation of Section 2306.1113 of the Texas Government Code will also be cause for termination.

19. **OTHER REQUIREMENTS.** THE CORPORATION MAY IMPOSE ADDITIONAL OR DIFFERENT REQUIREMENTS ON A DEVELOPER THAN THOSE PROVIDED IN THESE GUIDELINES IF ADDITIONAL OR DIFFERENT REQUIREMENTS BECOME NECESSARY (AS DETERMINED BY THE CORPORATION IN ITS SOLE DISCRETION) TO PROVIDE THE BEST OPPORTUNITY FOR APPROVAL BY THE CORPORATION'S BOARD ~~OF DIRECTORS~~ AND/OR THE TEXAS BOND REVIEW BOARD.

# Texas State Affordable Housing Corporation

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### **APPENDIX A**

#### **~~TSAHC Resident Services Program Guidelines~~**

~~It is the Texas State Affordable Housing Corporation's goal to support Developers in the creation of high-quality Resident Service Programs. TSAHC has created basic guidelines and a reporting system to help with this process.~~

~~The following is a list of activities/courses that can be implemented. In order to fulfill the Resident Service requirement, at least six resident service activities per quarter must be provided from the following list. Developers must ensure services are provided onsite or provide free transportation to services if off-site. If the applicant received additional points under the Resident Service scoring criteria, an average of at least four resident service activities per month must be provided from the following list. If you are interested in starting an activity or course that is not on the list, please propose the new activity to the Multifamily Oversight Department for approval. Activities that are provided daily, such as after school programs and educational/scholastic tutoring, can be counted as two services for the quarter. Please make sure that services offered will encourage economic self-sufficiency and/or promote homeownership opportunities.~~

#### ~~• Career Services~~

- ~~1. Computer Literacy Class~~
- ~~2. GED Classes~~
- ~~3. Job Skills/Training~~
- ~~4. Resume/ Job Search Workshop~~
- ~~5. Job Fair~~
- ~~6. College Preparation Class~~
- ~~7. Military Recruiting~~

#### ~~• Children's Services~~

- ~~1. After School Care (Counts as 2 Services When Provided Daily)~~
- ~~2. Swimming Lessons~~
- ~~3. Free On-site Daycare (Counts as 2 Services When Provided Daily)~~

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~~4. Free On-site Tutoring Sessions (Counts as 2 Services When Provided Daily)~~

~~5. Performing Arts Classes~~

~~6. Holiday Safety Classes~~

~~7. On-Site Library~~

~~8. Free Lunch Program (Counts as 2 Services When Provided Daily)~~

~~• Community Awareness~~

~~1. Crime Watch Meeting~~

~~2. Self Defense Course~~

~~3. Child ID/Fingerprinting Program~~

~~4. Fire Safety Class~~

~~5. Hurricane Safety Class~~

~~6. Domestic Violence Awareness Workshop~~

~~7. Drug Awareness Workshop~~

~~8. Host Support Groups Such as AA, Anger Management, etc.~~

~~9. Community Gardens~~

~~10. Community Service Activities (i.e. Habitat for Humanity)~~

~~11. Green Living/Environmental Workshop~~

~~• Financial Skills~~

~~1. Household Budgeting Workshop~~

~~2. Financial Planning/Credit Counseling Workshop~~

~~3. Asset Building Workshop~~

~~4. Tax Preparation Courses~~

~~5. Student Financial Aid Workshop~~

~~6. Personal Insurance Workshop (Medical, Renters, Life, Disability, Car)~~

~~• Medical and Health Services~~

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- ~~1. Basic First Aid and CPR Class~~
- ~~2. Caring for the Disabled Class~~
- ~~3. Health and Screening Services~~
- ~~4. HIV/AIDS Classes~~
- ~~5. Vaccinations/ Flu Shots Services~~
- ~~6. Fitness and Exercise Classes~~
- ~~7. Diabetes/ Heart Disease Courses~~
- ~~8. Babysitting Safety Courses~~
- ~~9. Health and Nutritional Courses~~
- ~~10. Low Cost Healthy Cooking Courses~~
- ~~11. Cancer Awareness Workshop/Cancer Screening Services~~
- ~~12. Free Dental Services~~
- ~~• Personal Development~~
  - ~~1. Counseling Services~~
- ~~2. English as a Second Language Courses~~
- ~~3. Home Ownership Counseling~~
- ~~4. Parenting Classes~~
- ~~5. Anger Management Courses~~
- ~~6. Family Counseling~~
- ~~7. Cleaning Supply Safety Class / Housekeeping Education~~
- ~~8. Book Club~~
- ~~• Free Transportation Services~~
  - ~~1. Grocery Store~~
  - ~~2. Library~~
  - ~~3. Medical Visits~~
  - ~~4. Cultural Community Events~~

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### ~~5. Free/Discounted Public Transportation Tickets~~

~~Activities that will not be counted towards the six resident services per quarter requirement include, but are not limited to, children's movie time, patio decorating contests, gambling trips, resident parties, Easter Egg Hunts or other activities along these lines. Properties are welcome to offer these activities, but they will not count towards fulfilling the Resident Services obligation.~~

## Tab 4

Presentation, Discussion and Possible Approval for Publication and Public  
Comment of the Draft of the Texas State Affordable Housing Corporation's 2022  
Annual Action Plan.



**TEXAS STATE AFFORDABLE HOUSING CORPORATION  
2022 ANNUAL ACTION PLAN**

# TEXAS STATE AFFORDABLE HOUSING CORPORATION

## 2022 ANNUAL ACTION PLAN

### INTRODUCTION

This plan is prepared in accordance with Texas Government Code, Section 2306.566, which requires the Texas State Affordable Housing Corporation (“TSAHC”) to develop a plan to address the state’s housing needs. Texas Government Code, Section 2306.0721(g) requires TSAHC’s Annual Action Plan to be included in the State Low Income Housing Plan (“SLIHP”) prepared by the Texas Department of Housing and Community Affairs (“TDHCA”).

### TSAHC OVERVIEW

The Texas State Affordable Housing Corporation, created in 1994 at the direction of the Texas State Legislature, is a self-sustaining nonprofit entity whose purpose is to primarily serve the housing needs of low, very low, and extremely low-income Texans and other underserved populations who cannot access comparable housing options through conventional financial channels. TSAHC’s enabling legislation can be found in Texas Government Code, Chapter 2306, Subchapter Y, Sections 2306.551 et seq.

TSAHC’s office is located in Austin, Texas. A five-member volunteer Board of Directors, appointed by the Governor of Texas, oversees the policies and business of TSAHC. None of TSAHC’s programs or operations are funded through the State’s budget appropriations process.

TSAHC is statutorily authorized to issue mortgage revenue bonds and other tax-exempt bonds to finance the purchase and creation of affordable housing. TSAHC also has the authority to use loans from banks, private mortgage companies, nonprofit organizations and other financial institutions to assist primarily low, very low, and extremely low-income Texans. Over the course of its history, TSAHC has utilized approximately \$4 billion in single family bonding authority and approximately \$1.1 billion in multifamily private activity bonds.<sup>1</sup> Bond issuances are used to finance the creation and preservation of affordable multifamily housing and the following home buyer programs:

- Homes for Texas Heroes Home Loan Program
- Home Sweet Texas Home Loan Program
- Mortgage Credit Certificate Program

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<sup>1</sup> 2021 TSAHC bond activity includes the closing of \$104,791,000 in Multifamily Private Activity Bonds.

Using its statutory purpose and powers as guidance, TSAHC has developed the following additional programs, services, and initiatives to help meet the need for affordable housing in Texas:

- Home Buyer and Financial Education
- Texas Housing Impact Fund
- Affordable Communities of Texas
- Asset Oversight and Compliance
- Single Family Rental Program
- Multifamily Rental Program
- Texas Foundations Fund
- Grants for Disaster Recovery
- Supportive Housing Initiatives

#### **TSAHC MISSION AND OBJECTIVE**

TSAHC's mission is to serve the housing needs of moderate, low, very low, and extremely low-income Texans and other underserved populations through innovative programs. TSAHC accomplishes this mission by helping developers build housing for working families, and helping Texans achieve and sustain the dream of homeownership and improve their financial situation. TSAHC's programs and initiatives reflect our core belief that every Texan deserves the opportunity to live in safe, decent and affordable housing.

As Texas' population grows and the housing industry changes, the programs and services TSAHC administers continue to evolve and expand to meet these changing dynamics. TSAHC remains committed to the populations it has historically served, but is also active in responding to new challenges like creating supportive housing developments for Texas' most vulnerable residents, preserving housing in rural areas, expanding housing opportunities for Texans with complex health needs, helping Texans rebuild after natural disasters, and helping Texans remain stably housed during difficult times like the ongoing pandemic.

TSAHC's objective in 2022 is to serve the evolving housing needs of Texans by implementing innovative solutions through its current programs and adapting those programs where necessary to respond to changes in the housing market. TSAHC also remains committed to exploring opportunities to establish new programs and initiatives to better assist underserved populations and entities addressing housing affordability challenges.

## TSAHC'S ONGOING RESPONSE TO COVID-19

The past two years have completely reshaped how Texans live and do business. During that time, TSAHC responded to the pandemic in a variety of ways summarized below.

In March 2020, TSAHC launched a COVID-19 resources web page<sup>2</sup> with general important information and resources specific to homeowners, renters, rental housing professionals, homeless assistance providers, consumers and nonprofits. TSAHC continues to update this web page as new information and resources became available.

Per a March 13th, 2020, disaster declaration and subsequent waivers of portions of Texas Government Code, Chapter 551, the TSAHC Board of Directors meetings were held virtually and continued that way until the September 15<sup>th</sup>, 2021 Board meeting, which was held in person at TSAHC's offices.

Over the past two years, TSAHC has been committed to working with tenants that reside in properties we own to keep them stably housed and respond to work requests in a safe manner. We implemented a rental assistance program for tenants and set up payment plans for tenants experiencing financial hardships. If a tenant received rental assistance, we required them to attend a virtual financial education course. Additionally, we automatically renewed leases for all tenants (unless they opted out of the lease) and froze rental rates for 2020 and 2021. Lastly, we helped tenants apply for local and statewide assistance programs when appropriate.

For properties that receive physical inspections and site visits as part of our asset oversight and compliance program, we quickly transitioned to virtual inspections to protect the health and safety of TSAHC staff and property management. The virtual site visits still allowed us to honor the responsibilities that come with overseeing these properties. In 2021, we transitioned to a hybrid of virtual and in-person site visits.

Throughout the past two years, we have continued to participate in internal and external meetings on virtual platforms, and we transitioned programs and initiatives that were formerly held in-person to virtual platforms. We continue to monitor the ongoing state of the pandemic and will make decisions to return to in-person events on a case-by-case basis with health and safety considerations being the primary driver for decision-making.

### *Texas Housing Stability Collaborative*

Beginning in late summer 2020, TSAHC partnered with a collection of individuals and organizations working to avert home mortgage foreclosures and rental evictions caused by COVID-19. This partnership, known as the Texas Housing Stability Collaborative,<sup>3</sup> is building its network raising awareness about free mortgage and rental assistance options to Texas

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<sup>2</sup> <https://www.tsahc.org/news/article/covid-19-resources-and-helpful-information>

<sup>3</sup> <https://texashousingstability.org/>

households provided by Texas' HUD-approved housing counseling agencies. As a founding member, TSAHC continues to advise and support the collaborative.

## **PROGRAM DESCRIPTIONS AND IMPLEMENTATION PLANS**

### **HOMEOWNERSHIP PROGRAMS**

Over the last decade, research has consistently shown that homeownership has a positive impact on the socioeconomic status of a household and their community. The most recent data from the Federal Reserve highlights the economic benefits of homeownership as the average household wealth of a homeowner is \$255,000 while the average wealth of a renter is \$6,300.<sup>4</sup>

In addition to financial benefits, there are social benefits to homeownership. Stable housing created by homeownership can lead to better educational achievement, health benefits, reduced crime, and improved civic participation.<sup>5</sup>

TSAHC currently administers the Homes for Texas Heroes and Home Sweet Texas Home Loan Programs, which provide 30-year fixed-rate mortgage loans, tax credits, and down payment assistance to low and moderate-income families and individuals.

The Homes for Texas Heroes Home Loan Program was established by the Legislature in 2003 for the purpose of making mortgage loans with down payment assistance to:

- Public School Classroom Teachers
- Public School Teacher's Aides
- Public School Librarians
- Public School Nurses
- Public School Counselors
- Faculty Members of an Allied Health or Professional Nursing Program
- Paid Firefighters
- Emergency Medical Services Personnel
- Peace Officers
- Corrections Officers
- Juvenile Corrections Officers
- County Jailers
- Veterans
- Public Security Officers

In 2006, TSAHC created the Home Sweet Texas Home Loan Program to serve home buyers not eligible for the Homes for Texas Heroes Home Loan Program. The Home Sweet Texas Home Loan Program serves Texans of all professions.

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<sup>4</sup> Source: Brett Holzhauer, "Here's the average wealth of homeowners and renters," CNBC, August 24, 2021

<sup>5</sup> Source: "Social Benefits of Homeownership and Stable Housing," Richard J. Rosenthal Center for Real Estate Studies, October 2017



### *Down Payment Assistance Options*

TSAHC offers down payment assistance (DPA) through both the Homes for Texas Heroes and Home Sweet Texas Home Loan Programs because a primary barrier for prospective buyers is accumulating sufficient funds for a down payment.<sup>6</sup>

This problem has worsened in recent years as increasing rents make it harder to save money and transition into homeownership. This is having a profound impact on middle-income households who are increasingly becoming rent cost-burdened and having a difficult time making the leap from renting to homeownership.<sup>7</sup>

Additionally, the median home price statewide reached a record high of \$310,000 in August 2021 and tapered off slightly to \$307,054 by September 2021. For further context, the median home price in Texas was \$270,000 at the end of 2020 and \$248,000 at the end of 2019.<sup>8</sup> This represents an approximately 9 percent increase from 2019-2020 and an approximately 14% increase from 2020 – currently the national average is just under a 4% increase annually.

To ensure low and moderate-income Texans can continue to achieve the dream of homeownership, TSAHC increased the income limits for our Homes for Texas Heroes and Home Sweet Texas Home Loan Programs from 115% of the area median family income to 125% of the area median family income on October 1, 2021.<sup>9</sup> Serving moderate-income Texans – those between 80 and 125 percent AMFI – is an important component of meeting the state’s housing needs, because those households are struggling to afford homes in the absence of assistance.

TSAHC’s down payment assistance continues to be available on a first-come, first-served basis, and is provided either in the form of a grant that does not require repayment or a three-year deferred forgivable second lien. Home buyers must also meet income and purchase price limits set by federal guidelines, while demonstrating creditworthiness and meeting standard mortgage underwriting requirements. Home buyers must also occupy the purchased home as their primary residence. The programs are accessible to eligible borrowers by directly contacting a participating mortgage lender.

### *Homeownership Programs Financing Mechanisms*

TSAHC funds its mortgage loans with down payment assistance in two ways: by issuing mortgage revenue bonds available under its statutory authority, and by pooling loans on a regular basis and selling the mortgage-backed securities (known in the industry as the TBA program). TSAHC did not issue mortgage revenue bonds and funded its mortgage loans with down payment assistance exclusively through the TBA program in 2021.

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<sup>6</sup> Source: “Biggest Barriers to Homeownership,” <https://dsnews.com/daily-dose/09-02-2021/biggest-barriers-to-homeownership>, dsnews.com, September 2, 2021

<sup>7</sup> Source: “America’s Rental Housing 2020,” Joint Center for Housing Studies of Harvard University, 2020

<sup>8</sup> Source: <https://www.recenter.tamu.edu/data/housing-activity/>, accessed November 12, 2021.

<sup>9</sup> The income limits for the Mortgage Credit Certificate program continue to be set at 115% AMFI per federal guidelines.

## *Mortgage Credit Certificate Program*

In 2008, TSAHC established the Mortgage Credit Certificate (MCC) Program as another way to assist first-time home buyers. The MCC Program is made possible under IRS rules that allow the conversion of single-family mortgage revenue bonds into MCCs. TSAHC's MCC Program serves the same populations eligible for the Homes for Texas Heroes and Home Sweet Texas Home Loan Programs; however, the program is only available to first-time home buyers (defined as those who have not owned a home in three years).

Under the MCC Program, the home buyer can take a portion of the annual interest paid on the mortgage loan as a special federal income tax credit. An MCC has the potential of saving the home buyer thousands of dollars over the life of the loan. And although the MCC Program is not a home loan program, TSAHC requires the home buyer to obtain a fixed-rate mortgage loan. Home buyers can also combine the MCC Program with the mortgage loan and down payment assistance provided under the Homes for Texas Heroes and Home Sweet Texas Home Loan Programs.

## *Home Buyer Education Requirement*

Every home buyer who utilizes one of TSAHC's homeownership programs must complete an approved home buyer education course offered by a provider listed on the Texas Financial Toolbox website.<sup>10</sup> The providers listed on this site are generally nonprofit organizations or government entities who are either HUD-approved or certified to provide home buyer education.

TSAHC requires home buyer education to ensure households are well prepared for the responsibilities of owning a home. Research by the U.S. Department of Housing and Urban Development (HUD) revealed that home buyer education empowers individuals with the ability to make better financial decisions, understand their home buying options, improve their credit, save more money, and lower housing costs.<sup>11</sup>

Moreover, according to that same HUD publication, home buyer education can help mortgage borrowers avoid delinquencies and defaults. The HUD paper references the 2014 National Foreclosure Mitigation Counseling program that analyzed 240,000 loans and found that borrowers that took home buyer education were three times more likely to get a loan modification to avoid default.

Recognizing the importance of online home buyer education options during the COVID-19 pandemic, TSAHC also partnered with BBVA to offer free online home buyer education courses to 575 TSAHC home buyers in 2021.

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<sup>10</sup> Texas Financial Toolbox, <http://www.texasfinancialtoolbox.com/home-buyer-education>

<sup>11</sup> Source: Evidence Matters, "The Evidence on Homeownership Education and Counseling," Spring 2016

## *2021 Homeownership Programs Changes*

In May 2020, the market uncertainty created by COVID-19 required TSAHC to implement a temporary overlay to our homeownership programs eligibility requirements. This overlay was imposed by TSAHC's master loan servicer. Per that overlay, all government loans for borrowers with total debt to income (DTI) ratios greater than 45% were required to have a minimum 700 credit score. In May 2021, TSAHC's master loan servicer lifted the overlay allowing us to once again serve households with 620 or higher credit scores, regardless of their DTI.

TSAHC continues to serve a record number of home buyers, and in response to this, we continue to onboard new homeownership staff. This enables us to respond to the increase in home buying demand and meet consumer and lender needs promptly and efficiently.

TSAHC also launched a podcast in 2020 and continue to produce new episodes on topics pertaining to homeownership, home buying and other housing related issues. We produced 12 episodes in 2020 and an additional 8 in 2021.<sup>12</sup> We also launched Facebook live events to answer questions for industry professionals and prospective home buyers in real time.

We continue to engage our Lender Advisory Council to gather their feedback on TSAHC's homeownership programs, stay abreast of any changes or developments in the mortgage industry, and adjust to meet the needs of Texas' home buyers.

Most importantly, on October 1, 2021, TSAHC also expanded the eligibility requirements for home buyers receiving non-bond, stand-alone down payment assistance through our Homes for Texas Heroes and Home Sweet Texas Home Loan Programs. In addition to increasing the income limits from 115% to 125%, we established higher purchase price limits based on guidance from federal housing entities. TSAHC implemented these important changes in direct response to the data above demonstrating that more middle-income households are becoming rent cost-burdened and dealing with escalating home prices. This allows us to continue to better meet our mission of serving Texans at these income levels.

## *2021 Homeownership Programs Activity Synopsis*

In 2021, TSAHC's home buyer programs helped 17,786 households with their home purchase through down payment assistance, an MCC, or both.<sup>13</sup>

In comparison, TSAHC assisted 16,325 households in 2020 and 9,397 households in 2019. To date, TSAHC has served more than 72,211 households under our homeownership programs.

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<sup>12</sup> <https://www.buzzsprout.com/1048519>

<sup>13</sup> This marks activity through October 31, 2021.

## *2022 Implementation Plan*

In 2022, TSAHC will engage the Lender Advisory Council on ways to improve our programs and stay on top of industry trends. We will also make sure our staff is able to respond to the incredible home buying demand in Texas, should that continue into the next year. Lastly, TSAHC will look to expand the reach of our programs by continuing to build upon relationships with current lenders and recruiting additional lenders to participate in our programs.

In addition to the above, TSAHC is actively working with a collaborative to increase the number of homeowners that identify as Black, Indigenous, or persons of color (BIPOC) in the greater Houston area. The initiative is called the Wells Fargo BIPOC Wealth Opportunities Restored through Homeownership (WORTH) program, and the goal is to create 5,000 new BIPOC homeowners in Houston by 2025. TSAHC was approached by the Local Initiatives Support Corporation (LISC) to participate in the initiative alongside other housing and community development organizations in the Houston area. Our collaborative was awarded a planning grant in late 2021, and we are now engaging a consultant to develop an implementation plan that will be forthcoming in March 2022.

### **HOME BUYER EDUCATION AND FINANCIAL EDUCATION**

#### *Connecting Consumers with High Quality Housing and Financial Counselors*

In 2012, TSAHC created the Texas Financial Toolbox ([www.texasfinancialtoolbox.com](http://www.texasfinancialtoolbox.com)) to give consumers an easy way to find nonprofit organizations or government entities that can help them achieve their financial and homeownership goals through home buyer education, credit counseling, or financial education.

Whether consumers want to learn how to better manage their money, find out if they're ready for homeownership, understand the home buying process and the programs that are available to help them buy a home, or learn how to avoid foreclosure, the Texas Financial Toolbox is a great place to start. Information about home buyer programs, home buyer education classes, financial education, and foreclosure prevention is available, all searchable by city. This is a unique tool TSAHC believes is providing essential information to Texas consumers.

In 2018, TSAHC expanded the Toolbox resource by creating a Loan Comparison Calculator<sup>14</sup> to help potential home buyers compare the different loans types and down payment assistance options offered by TSAHC. This tool is also available on TSAHC's website [www.tsahc.org](http://www.tsahc.org).

The Loan Comparison Calculator replaced an earlier down payment assistance calculator created in 2017 and a mortgage calculator created in 2010 that provided home buyers with an estimated interest rate based on their credit score.

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<sup>14</sup> <http://www.texasfinancialtoolbox.com/mortgage-calculator>

The Toolbox also includes a step-by-step guide to help families and individuals gain a better understanding of the home buying process.

### *Housing Connection Training*

TSAHC has offered home buyer and financial education training to Texas housing nonprofits since 2012. From 2012-2017, TSAHC administered the Texas Statewide Homebuyer Education Program (TSHEP), a housing and financial counselor training program, on behalf of the Texas Department of Housing and Community Affairs. In late 2017 TSAHC decided to expand the scope of the training services provided and opted not to continue our role as administrator of TSHEP.

In 2018, TSAHC introduced the Housing Connection training program. The Housing Connection training built upon the success of TSHEP by offering not only housing and financial counselor training but also training for nonprofits interested in affordable housing development. The program's goal is to help both affordable housing and counseling organizations access trainings, promote themselves, and build capacity for their organizations and programs.

For the 2021 Housing Connection course selection, we offered the most requested courses as well as courses specific to evictions and foreclosures given the ongoing housing instability issues that have arisen due to the pandemic.

These courses were: (1) Rental Counseling & Eviction Preventions in Times of Crisis, (2) Foreclosure Basics for Homeownership Counselors, (3) Homeownership Counseling Certification: Principles, Practices and Techniques, and (4) Best Practices to Improve Your Foreclosure Intervention Counseling Program.

In 2021, 106 housing counselors representing 76 organizations and 41 cities received training through Housing Connection. Moreover, TSAHC was able to provide a scholarship to each participant in 2021 to cover the cost of the training.

To date, 748 individuals representing 315 organizations in 140 municipalities across Texas have attended trainings provided by TSAHC through either TSHEP (2012-2017) or Housing Connection (2018-2021). Additionally, TSAHC has provided \$126,093 in scholarships to participants.

### *2022 Implementation Plan*

In 2022, TSAHC will once again provide a variety of courses for housing counselors and nonprofit housing professionals. Instructor-led courses will either be offered entirely virtually or in-person depending on the safety of in-person training. TSAHC also plans to offer self-guided webinars to supplement the instructor-led courses.

TSAHC will continue to make the training as affordable as possible by raising public and private funds to subsidize the costs of attending a training either virtually or in-person.

## TEXAS HOUSING IMPACT FUND

The Texas Housing Impact Fund (THIF) helps provide safe, decent, and affordable housing with an emphasis on serving rural and underserved communities by providing flexible financing options to affordable housing developers.

Leveraging investments from private foundations and banks, TSAHC is able to provide both short-term and long-term affordable housing financing to developers through the THIF. This funding model has enabled TSAHC to steadily grow the fund over time, with applications for new loans accepted on an ongoing basis, provided there is funding available for the program.

To date, the Texas Housing Impact Fund has financed the construction or rehabilitation of 284 single family homes and 3,272 rental units for low and moderate-income households. These numbers include units currently under construction.

TSAHC currently offers four types of loans:

- Permanent financing loans
- Revolving lines of credit
- Construction loans
- Deferred forgivable loans offered through the Affordable Housing Partnership (currently limited to Dallas and Travis counties)

In 2020, TSAHC launched a predevelopment loan option for Central Texas developers as a pilot program, but that program ended in 2021.

### *Single Family Construction/Rehabilitation*

Homeownership continues to be the primary means by which lower-income households create stability and build wealth for the future. As mentioned above, the average household wealth of a homeowner is \$255,000 while the average household wealth of a renter is \$6,300.

However, due to rising housing prices, many Texans cannot afford to purchase a home in their communities. For example, according to the Real Estate Center at Texas A&M University, as of August 2021, the median home price in Texas was a record high \$310,000.<sup>15</sup> Escalating home prices are especially problematic in urban areas like Austin (median home price of \$448,000), Dallas (\$350,000), and Houston (\$300,000).<sup>16</sup>

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<sup>15</sup> Source: <https://www.recenter.tamu.edu/data/housing-activity/>, accessed November 15, 2021.

<sup>16</sup> Source: <https://www.recenter.tamu.edu/data/housing-activity/>, accessed November 15, 2021.

By financing the construction or rehabilitation of single-family homes that are affordable to well-qualified low and moderate-income home buyers, the Texas Housing Impact Fund is helping families and individuals achieve the dream of homeownership and build household wealth.

In 2021, TSAHC approved a THIF line of credit to construct 5 homes for low- to moderate-income home buyers in Port Arthur, Texas.

#### *Multifamily Construction/Rehabilitation*

TSAHC also recognizes that not all families and individuals are ready to become homeowners. Access to affordable and decent rental housing is what is most important to these households. By funding the construction or rehabilitation of affordable rental units, the Texas Housing Impact Fund helps households access safe and decent rental homes without having to sacrifice other basic needs, such as food, education, or medical care.

In 2021, TSAHC provided THIF financing to help rehabilitate or construct 367 affordable rental units.

#### *Predevelopment Loans*

In spring 2020, TSAHC partnered with the Austin Community Foundation to launch a predevelopment loan program targeted to small-scale or neighborhood-oriented nonprofit developers in the five-county Central Texas region. In 2020, TSAHC made one loan under the program to Chestnut Neighborhood Revitalization Corporation to support the construction of 49 condominiums as part of Phase II of The Chicon development located in Central East Austin. In 2021, we discontinued the loan product due to difficulties identifying developers who needed this source of financing.

#### *Affordable Housing Partnership*

TSAHC launched the Affordable Housing Partnership (AHP) program in 2020 as part of the THIF suite of loan products. Thanks to a partnership with the Texas Health and Human Services Commission, TSAHC offers deferred forgivable loans to developers in Dallas and Travis counties to subsidize the construction of affordable, accessible, and community-integrated units designated for residents with long-term health needs.

In 2021, TSAHC approved 5 loans to support the construction of 23 rental units in Dallas and Travis counties.

*Texas Housing Impact Fund Loan Production*

<b>Loan Production</b>	<b>2021</b>	<b>2003 - 2020</b>
Loans Approved	10	41
# of Single Family Homes Built or Under Construction	5	279
# of Rental Units	367	2905
Amount of Loan Funds Approved	\$7,025,000 <sup>17</sup>	\$26,405,462

*2022 Implementation Plan*

TSAHC plans to continue to provide flexible lines of credit to developers that address our funding priorities. These loan products, leveraged with TSAHC's access to lower cost land through its Affordable Communities of Texas (ACT) land bank, will enable these developers to continue to construct and rehabilitate single family homes that are affordable. TSAHC forecasts sustained demand for THIF loans into 2022 as staff is currently reviewing multiple applications for single-family and multifamily developments around Texas.

In 2022, TSAHC plans to continue to explore lending opportunities to address housing needs for underserved populations including disaster impacted areas, small urban and rural markets, and urban areas that are rapidly changing and risk losing affordable housing. In 2022, there will be an emphasis on marketing the Affordable Housing Partnership to address the housing needs of Texans with long-term health needs and expanding that program to Bexar and Harris counties.

TSAHC will continue to grow the fund by pursuing grants, program related investments or equity equivalent investments from foundations, banks, and other lenders and investors.

TSAHC will also continue to publish an annual Texas Housing Impact Fund Investment Report to document the statewide impact of the program. This report enhances TSAHC's efforts to market the Texas Housing Impact Fund to developers and potential investors.

**AFFORDABLE COMMUNITIES OF TEXAS PROGRAM**

TSAHC created the Affordable Communities of Texas (ACT) Program, a land bank and land trust program, in 2008 to stabilize communities experiencing high rates of foreclosure. TSAHC works in partnership with 30 nonprofit organizations across the state to acquire and redevelop foreclosed homes, vacant land, and tax foreclosed properties to make these homes available for sale or rent to low-income families.

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<sup>17</sup> Texas Housing Impact Fund loans are a revolving line of credit for single-family construction awarded to Legacy CDC and loans for the rehabilitation or creation of multifamily units for Midpark Towers LLC; Dallas Stemmons, Ltd.; Embree Eastside, Ltd.; Guadalupe Neighborhood Development Corporation; Housing Authority of Travis County; Project Transitions; June West LLC; and Kiva East, LLC.



Over its history, TSAHC has acquired 572 properties through the ACT program and has created 296 homes for extremely low, very low, low, and moderate-income Texans. The ACT Program has a current portfolio of 46 lots and homes, and there are three active components of the program distinguished by source of funding and targeted use of properties:

- ACT Land Banking – This is TSAHC’s general land banking program that includes properties that are either purchased by TSAHC or donated to TSAHC. Properties are redeveloped for affordable housing. If a property is not suitable for redevelopment (i.e. poor location, high cost of redevelopment, or other extenuating circumstances), the property is sold, and the funds are reinvested in the ACT Program.
- ACT Land Trust – Properties acquired are intended to be held in perpetuity by TSAHC. Homes built or redeveloped on land trust sites may be rented or sold to qualified low-income households.
- Texas NSP – This category includes those homes and properties that were acquired using Texas’ federal Neighborhood Stabilization Program (NSP) funding. TSAHC successfully sold and/or transferred all remaining NSP properties in 2021.

*Affordable Communities of Texas Portfolio*

<b>Program/Initiative</b>	<b>Acquisitions 2021</b>	<b>Sales 2021</b>	<b>Current Portfolio</b>	<b>Current Asset Value</b>
ACT Land Banking / Land Trust	0	10	18	\$795,131
Texas NSP	0	12	0 <sup>18</sup>	\$0

*2022 Implementation Plan*

The ACT Program will continue to play an integral role in TSAHC’s overall affordable housing strategy. TSAHC intends to increase efforts to expand our portfolio of ACT land bank properties by forming partnerships to acquire foreclosed and vacant properties and working directly with local and regional governments where possible. For properties already in our land bank, we will continue working with our network of local partner developers to redevelop and sell those properties. We also intend to begin developing a parcel of land in Plano, Texas that is part of our land trust.

TSAHC sold 12 NSP homes in 2021 and successfully transferred the remaining 133 NSP lots that were in our portfolio to TDHCA and/or local partners. As that program has concluded, it will allow us to place a stronger emphasis on expanding our land bank activities and redeveloping those properties alongside local partners.

TSAHC continues to explore the implementation of land trust mechanisms that allow TSAHC to deliver homeownership opportunities to low- to moderate-income home buyers and deeper levels of affordable rental housing.

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<sup>18</sup> In 2021, TSAHC transferred the remaining 133 vacant NSP lots in our portfolio to TDHCA and/or local partners.

## MULTIFAMILY PRIVATE ACTIVITY BOND PROGRAM

TSAHC uses its statutory authority to issue tax-exempt multifamily private activity bonds (PAB) to help affordable housing developers construct or preserve multifamily rental units. As a conduit issuer, TSAHC is allocated 10 percent of Texas' multifamily PAB cap each year.

TSAHC makes available to developers its multifamily PAB allocation through an annual Request for Proposal application process. To be considered for multifamily PAB financing, multifamily developments must meet specific housing needs identified each year by TSAHC's Board of Directors. In 2021, those housing needs were:

- At-Risk Preservation and Rehabilitation of Existing Affordable Units
- Housing in Rural and Smaller Urban Markets
- Senior and Service Enriched Housing Developments
- Housing in Areas with Disaster Declarations

In 2021, TSAHC closed on \$104,791,000 in multifamily PABs to construct or rehabilitate 1,008 affordable rental units across 7 municipalities.<sup>19</sup>

### *2022 Implementation Plan*

TSAHC anticipates continued interest and growth in our PAB program due to the high number of affordable housing units needed to meet the demand. For example, research conducted by the National Low Income Housing Coalition found that, in Texas, there are only 51 units that are affordable for every 100 households that earn 50% or less of the average median income.<sup>20</sup>

The demand is reflected in the number of TSAHC PAB projects that are either currently induced, pending closing or under review. That pipeline of potential 2022 PAB closings already includes 3 developments that total 756 units and \$115,500,000 in total bond financing.

TSAHC plans to continue to address this ongoing housing demand using PABs to finance the construction and rehabilitation of units that are affordable to low and very low-income Texans. In 2022, TSAHC will build on our initiatives that emphasize the preservation of housing in rural areas and work with developers who are addressing this housing priority.

TSAHC will also explore how to create more permanent supportive housing (PSH) units either through PABs or other financing structures. The creation of additional PSH housing is another priority for TSAHC, due in part to an ongoing collaboration with the Texas Health and Human Services Commission that will be covered in detail later in this plan.

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<sup>19</sup> The developments are Las Palmas Village in Eagle Pass, Texas; Riverstation Apartments in Dallas, Texas; Gardens of Balch Springs in Balch Springs, Texas; W. Leo Daniels Towers in Houston, Texas; Marshall Apartments in Austin, Texas; Fawn Ridge Apartments in The Woodlands, Texas; and Pine Terrace Phases I and II in Mt. Pleasant, Texas.

<sup>20</sup> Source: "The Gap: A Shortage of Affordable Homes," The National Low Income Housing Coalition, March 2021

## ASSET OVERSIGHT AND COMPLIANCE

Asset oversight and compliance monitoring of multifamily properties financed through multifamily private activity bonds is required by many bond issuers, including TSAHC. TSAHC also requires asset oversight and compliance monitoring of multifamily properties financed through our Texas Housing Impact Fund. TSAHC believes these reviews are one of the best ways to ensure properties are continuing to provide safe and decent affordable housing to their residents.

### *Asset Oversight*

As part of the asset oversight review process, staff performs an annual inspection of each property; monitors each property's financial and physical health; and provides suggestions for improvement to property owners and managers. Staff completes a report of each property and submits its reports to property owners, managers and other stakeholders. The reports are also available on TSAHC's website.

These visits are typically on-site, physical inspections, but because of the ongoing COVID-19 pandemic, TSAHC performed a hybrid of virtual and in-person visits. For both types of reviews, TSAHC required property management agents to provide us with required property reports. But for virtual reviews, they also had to provide photos of the property.

In 2021, TSAHC performed asset oversight reviews for 59 properties, totaling 5,729 units. By comparison, TSAHC performed reviews on 35 properties, totaling 4,609 units in 2020.

### *Compliance*

As part of the compliance review process, staff reviews tenant files annually to ensure that property owners and managers are following the federal affordability requirements relating to the tax-exempt status of the bonds. Completed compliance reports are submitted to property owners, managers, and other stakeholders and are also available on TSAHC's web site. In addition, TSAHC manages an online reporting system that allows property managers to complete their monthly compliance reporting online.

Each month, staff monitors whether property owners and managers are providing the required number of affordable units to income-eligible households and that high-quality resident services are being provided. Monthly compliance monitoring helps TSAHC ensure that property owners and managers are meeting all program requirements.

In 2021, TSAHC performed compliance reviews for 57 properties, totaling 5,793 units. By comparison, TSAHC performed reviews on 35 properties, totaling 4,733 units in 2020. These properties are financed either through PABs or THIF financing. In 2021, we also renewed a contract with a third-party vendor to help them with compliance reviews as needed. TSAHC will

continue to ensure that staff is well-equipped to handle the demands of adding a significant number of properties and units to the asset and compliance review portfolio over the past year and into 2022.

### *2022 Implementation Plan*

In 2022, TSAHC staff will continue to conduct site visits in a manner that best protects the health and safety of our staff, and staff and residents at properties in our asset and compliance portfolio. In 2022, staff anticipates adding 8 properties and 1,280 units to the portfolio of properties monitored by TSAHC's staff. Additionally, staff anticipates performing compliance on units funded through the Affordable Housing Partnership program.

TSAHC will also continue to review and update its policies and procedures as industry trends and changes in policy dictate. TSAHC will continue to closely monitor the financial health and physical condition of properties in its portfolio and offer specific strategies for improvement.

### **SINGLE FAMILY RENTAL PROGRAM**

The cost of living in Austin continued to rise in 2021. According to the Real Estate Center at Texas A&M University, the median home price in Austin was \$448,000 as of September 2021<sup>21</sup>. The average monthly rent was \$1,619 as of November 2021.<sup>22</sup> These prices are simply unaffordable for many low-income Austin families.

In May 2013, TSAHC created the Single Family Rental Program to provide eligible low-income families with affordable, below-market rental homes in high-opportunity neighborhoods in the Austin Metropolitan Statistical Area (MSA).

Homes available through the program are located in areas with higher than average median incomes, with access to good schools and other services nearby. The program has received an extraordinary number of applications from low-income families and individuals interested in renting a home available under the program.

The program offers individuals and families that earn at or below 80% of the area median family income the opportunity to rent a home at prices significantly less than market rate. In addition to verifying income, TSAHC screens each applicant for rental, credit, and criminal history.

Given the success of the program and ongoing need for affordable rental opportunities in other areas of the state, TSAHC decided to expand the Single-Family Rental Program to San Antonio in 2019. Since that time, TSAHC has purchased six single-family homes in the San Antonio MSA which have all been leased to qualifying households.

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<sup>21</sup> Source: See Footnote 15.

<sup>22</sup> Source: <https://www.rentcafe.com/average-rent-market-trends/us/tx/austin/> (Accessed November 16, 2021)

In 2021, TSAHC added two more homes in Austin to the Single-Family Rental Program portfolio. Combined, the Single-Family Rental Program now provides 26 rental homes across the Austin and San Antonio MSAs.

### *2022 Implementation Plan*

In 2022, TSAHC will add two homes to its Austin portfolio. These homes are currently under construction. Additionally, TSAHC will seek to expand the program to the Dallas-Fort Worth metroplex. TSAHC intends to purchase an additional 6-8 homes across the three markets (Austin, Dallas-Fort Worth, and San Antonio) in 2022.

## **MULTIFAMILY RENTAL PROGRAM**

In July 2015, TSAHC expanded its rental program by acquiring the Rollins Martin apartment complex in East Austin. Built in 1998, the Rollins Martin apartment complex was originally financed as part of the federal low-income housing tax credit (LIHTC) program. It consists of 15 three-bedroom apartment units, all of which are affordable for families earning at or below 60% of the area median family income.

The apartment complex is located in a rapidly developing neighborhood of East Austin that is quickly becoming unaffordable to its long-time lower-income residents. Rents in that part of the Austin have increased at an alarming rate, going up 22-38.6% between 2011-2015.<sup>23</sup> By maintaining affordability in the rapidly changing neighborhood, TSAHC is meeting a critical housing need for the community.

Beyond this, TSAHC has also made substantial improvements to the Rollins Martin apartment complex. Since 2015, TSAHC has completed the following repairs and improvements: installed new appliances, tankless water heaters, and HVAC for each unit; installed new roofing, new outdoor trash receptacles, a bike rack, surveillance system, and a fence for the property; expanded doors for the laundry area in each unit; replaced all staircases; added additional security features to the locks on each unit's door; upgraded the surveillance system; replaced all siding and windows; added new paint, lighting, doors, mailboxes and signage; and completely renovated eight units.

In 2021, TSAHC also reconstructed the dumpster enclosure area to create more recycling space and poured a semicircle driveway to make it easier for trash trucks to safely access and leave the dumpster area. In addition, TSAHC built an ADA accessible sidewalk and pad for the common area between buildings 3 and 4.

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<sup>23</sup> Source: <https://data.austintexas.gov/stories/s/Household-Affordability/czit-acu8/>

## *2022 Implementation Plan*

In 2022, TSAHC will continue to renovate the apartment complex and individual units on a rolling basis after a tenant moves out to avoid any tenant displacement.

### **TEXAS FOUNDATIONS FUND**

#### *History of the Texas Foundations Fund*

TSAHC created the Texas Foundations Fund (TFF) to improve housing conditions for very low-income Texas households, with an emphasis on assisting persons with disabilities and rural communities. TSAHC defines very low-income households as households earning at or below 50% of the area median family income.

Through TFF, TSAHC partners with nonprofit organizations across Texas to support quality programs that address the critical housing needs of very low-income families and individuals. Selected partners receive grants to support their housing services. Since 2008, TSAHC has awarded more than \$5,220,500 in grants.

The housing services listed below are eligible for support through TFF:

- The rehabilitation and/or critical repair of owner-occupied, single family homes to remedy unsafe living conditions. Critical repairs may also include accessibility modifications to assist household members with a disability.
- The provision of supportive housing services for residents of housing units owned by the applicant receiving funding. The services supported by TFF must help individuals and families at risk of homelessness or unnecessary institutionalization gain and/or maintain their housing stability. Eligible supportive housing services include, but are not limited to: the provision of alcohol and drug counseling, adult education and/or job training, mental health counseling, case management, and services provided by a health care provider.

TSAHC selected these services by conducting a survey asking its partner housing organizations to identify the greatest housing needs of the very low-income Texans they serve. TSAHC also conducts follow up surveys every few years to confirm that the services funded by the Texas Foundations Fund are still critically needed by very low-income Texans.

TSAHC funds TFF awards primarily with earned revenue from its other housing programs. TSAHC's Board of Directors determines the amount available for each funding round.

Prior to each application cycle, TSAHC publishes TFF Guidelines for public comment, giving stakeholders the opportunity to provide feedback prior to submitting a funding proposal.

Prior to 2016, the Foundations Fund was a competitive grant process. However, for the past three award cycles (2016 – 2020), it has been a non-competitive application process. Nonprofits that meet eligibility criteria partner with TSAHC for a two-year term in a matching grant structure. The matching grant structure is a simpler process for applicants, and it allows TSAHC to serve more nonprofits than through a competitive grant application process.

### *2020-2021 Funding Cycle*

In early 2020, TSAHC surveyed TFF stakeholders to see if any changes should be made to the program. After compiling survey results, TSAHC made its draft 2020 Texas Foundations Fund guidelines available for public comment. Based on comments received, TSAHC staff decided to add in an administrative allowance of up to 10% of the grant amount to help organizations keep their programs operational during the ongoing COVID-19 pandemic.

The 2020-2021 TFF application cycle opened in May 2020. To better serve TFF applicants, TSAHC upgraded the online application system prior to releasing the application.

TSAHC received 38 applications from non-profits serving communities throughout Texas. After a thorough review of the applications, TSAHC staff determined that 33 applicants met the requirements to be selected as a funding partner.

The total funding available to these partners in 2020 was \$610,500, which equals \$18,500 per organization. TSAHC increased the funding available to partner organizations to \$660,000 in 2021, totaling \$20,000 per grantee.

### *2022 Implementation Plan*

In early 2022, we will once again survey partners and other stakeholders to help inform our decision making about how TFF should best operate. We anticipate making some modifications and incorporating the program into our broader Housing Connection program designed to support our network of nonprofits.

## **GRANTS FOR DISASTER RECOVERY**

### *Housing and Economic Assistance to Rebuild Texas (HEART)*

On August 23, 2017, Hurricane Harvey made landfall along the Texas coast, inflicting catastrophic damage to Southeast Texas, the Gulf Coast region, the greater Houston area, and the Coastal Bend area. On August 25, 2017, a Major Disaster Declaration was issued for 41 counties impacted by the hurricane.

In response to this catastrophic event, TSAHC partnered with Enterprise Community Partners to create a grant program to provide critical home repair funding, programmatic support, and technical assistance for nonprofits providing ongoing relief efforts to the impacted areas with

an emphasis on providing relief outside of the Harris County area.

The program, entitled Housing and Economic Assistance to Rebuild Texas (HEART), launched in April 2018 thanks to a generous financial commitment from the Rebuild Texas Fund, a joint initiative of the OneStar Foundation and the Michael & Susan Dell Foundation. Other funding was provided by the Meadows Foundation, the Center for Disaster Philanthropy, BBVA and a commitment from TSAHC's Board.

The program awarded \$2,555,000 to 39 nonprofits providing housing-related assistance to low-income households directly affected by Hurricane Harvey. Among those nonprofits, 19 provided critical home repair services, repairing 174 homes.<sup>24</sup> The HEART program also provided webinars (11 total with more than 200 attendees) as well as individual technical assistance opportunities. TSAHC and Enterprise Community Partners concluded administering the HEART program in early 2021.

#### *Winter Storm Uri Response*

In February 2021, Winter Storm Uri ravaged Texas, bringing prolonged below freezing temperatures and record snowfall to many parts of the state. In addition, millions of Texans were without electricity compounding the devastating impacts of this unprecedented disaster. The Federal Emergency Management Agency declared a disaster for every county in Texas and provided a combination of public and individual assistance depending on the severity of the disaster in those respective communities.

In March 2021, the TSAHC Board of Directors approved a special funding round of the Texas Foundations Fund program to respond to this event and made \$300,000 available to organizations providing home repairs for affected households in the most severely impacted areas.

TSAHC provided grant funding to 15 organizations that provided home repairs to 236 households between April and August 2021 through this special funding round. In 2022, TSAHC will explore ways to make funding readily available through the Texas Foundations Fund so organizations can quickly respond to severe weather events and natural disasters.

### **SUPPORTIVE HOUSING INITIATIVES**

#### *Partnership with Texas Health and Human Services Commission (HHSC)*

In 2016, TSAHC expanded its efforts to address supportive housing needs beyond grant funding provided through Texas Foundations Fund. It accomplished this by partnering with the Texas Health and Human Services Commission (HHSC) in a Center for Medicaid Services Innovation Accelerator Program (IAP).

The IAP launched in August 2017 and concluded in April 2018 with two outcomes. First, public

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<sup>24</sup> These numbers reflect grantee reports received through December 31, 2020.



and private partnerships developed between the Medicaid and housing systems to better address the housing and supportive services needs of the Medicaid recipient population. Second, HHSC and TSAHC created a state action plan that seeks to foster additional community living opportunities for Texans with ongoing health needs.

As part of executing the state action plan, TSAHC conducted a series of permanent supportive housing (PSH) workshops in 2019 for nonprofits and other interested parties who wish to create or preserve PSH units. These one-day workshops provided an overview of the financing of PSH developments and the implementation of supportive services at those developments.

### *Texas Supportive Housing Institute*

Building upon the success of the PSH workshops, TSAHC launched the Texas Supportive Housing Institute in September 2020, which provides technical assistance to nonprofits, developers, service providers and property managers interested in creating and operating supportive housing in their communities. The training is conducted by the Corporation for Supportive Housing (CSH).

Five teams successfully completed the first institute in 2020 representing Dallas (two teams), Fort Worth (two teams), and Brownsville. They attended monthly, multi-part sessions held virtually over the course of September to December 2020. An added component of the institute is one-on-one technical assistance with CSH. TSAHC also made follow up grants available to participating development teams through a partnership with JPMorgan Chase.

In 2021, TSAHC offered the Institute again with the following enhancements: reduced the number of participating teams from six to four to expand/improve the individual instruction and attention provided to each; solicited teams in relatively similar project stages to improve cross collaboration; provided training that looks at issues through a racial equity lens and incorporates feedback from those with lived experience; increased technical assistance from 14 hours per team 25 hours per team; and provided development teams with the opportunity to obtain Quality Endorsement reviews from CSH.

For the 2021 Institute, TSAHC selected four development teams in El Paso, Houston, San Antonio, and Waco. These teams will conclude the Institute in January 2022. TSAHC will continue to assess the pipeline of organizations and future projects in 2022 to determine how frequently to offer the Institute going forward.

Additionally, TSAHC will continue to explore new or improved finance mechanisms for supportive housing developments. TSAHC will continue to look for developers interested in participating in the Affordable Housing Partnership to create units for Texans with long-term health needs. These objectives are included in the state action plan created by TSAHC and HHSC.

### *General Homelessness Activities*

TSAHC continues to support other efforts addressing homelessness. This includes Advisory Member representation on the Texas Interagency Council for the Homeless (TICH) and serving

as liaison between the TICH and United State Interagency Council on Homelessness. In addition, TSAHC sponsors the annual Texas Conference on Ending Homelessness hosted by the Texas Homeless Network.

In 2022, TSAHC will continue to explore ways it can make an impact in homelessness including potentially offering the Texas Supportive Housing Institute mentioned above, supporting ongoing efforts to better use data to solve homelessness challenges, and working with organizations through either our development finance programs or the Texas Foundations Fund to build supportive housing and provide services for residents at those communities.

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## Tab 5

Presentation and Discussion of the Texas State Affordable Housing Corporation's  
Fiscal Year 2021 and 2022 Strategic Plans.