



2020 LOW INCOME HOUSING TAX CREDIT REQUEST FOR MUNICIPAL RESOLUTION

The City of El Paso requires the following information in order to process a request for support resolution for the Texas Dept. of Housing and Community Affairs as part of the 2020 Low Income Housing Tax Credit (LIHTC) application process. All 9% LIHTC applicants must fill out Sections A, B, and D. Section C is for 9% LIHTC applicants seeking City financial support. 4% HTC applicants must fill out sections A, B and D only.

- The deadline for 9% Housing Tax Credit Requests for Municipal Resolution is Monday, January 6th, 2020 by 9:00 a.m. (MST)

SECTION A. PROPERTY AND CONTACT INFORMATION

- Applicant/Developer: Sunset Vista Seniors, Ltd. (Applicant) / Investment Builders, Inc. (Developer)
- Contact Person: Roy Lopez
- Applicant Address: 7400 Viscount Blvd, Suite 109, El Paso, TX 79925
Phone: (915) 255-6588 E-Mail: rlopez@ibitoday.com
- Name of Proposed Development: Sunset Vista Seniors
- Proposed Development Address/Location: 1333 Pullman Drive, El Paso, TX 79936
- Type of Tax Credit requested of TDHCA (ex. 9% Statewide At-Risk or 9% Regional Competitive):
9% Regional Competitive

SECTION B. PROJECT INFORMATION

- Project type (rehabilitation, new construction, adaptive reuse, etc.): New construction
- Provide a written narrative explaining why the particular type of tax credit is being requested and how the proposed development meets TDHCA criteria and the City of El Paso adopted Evaluation Criteria for Requests for Local Government Support of LIHTC Proposals. To accomplish this, the narrative should include detailed descriptions of how the proposed development meets each of the criteria for Value Statements 2, 3, 4, and 5 in the City's adopted evaluation criteria (attached to this form). Narrative must be no more than 10 pages, single-spaced, 12 pt. Arial or Calibri font, 1" margins. Submit as Attachment B-2.
- Total cost of development (as prepared by an Architect, Engineer or Contractor): \$ 4,450,464
- Cost per square foot: \$ 128.79
- Amount of tax credits being requested of TDHCA: \$ 1,000,000
- Number of units & housing mix for proposed development (1, 2 or 3 bedroom) and Number of Affordable Units

Units/bedroom Size:	Total Quantity	Market Rate	80% AMI	60% AMI	50% AMI	30% AMI
1 Bedroom	24	1	0	13	6	4
2 Bedroom	20	1	0	15	3	1
3 Bedroom	0	0	0	0	0	0
4 Bedroom	0	0	0	0	0	0
Totals	44	2	0	28	9	5

7. Is the proposed development site properly zoned for proposed development? Yes No
- a. Current Zoning: C-4
8. Are property taxes current for the site? Yes No
- If yes, provide a copy of current property tax receipt, or print-out from:
https://actweb.acttax.com/act_webdev/elpaso/index.jsp Submit as Attachment B-8.
9. Is the property located in a flood zone? Yes No
10. Submit location map showing the project site. Submit as Attachment B-10.
11. Submit project Site Plan (and renderings if available). Submit as Attachment B-11.

SECTION C. FOR THOSE PROJECTS SEEKING FINANCIAL SUPPORT FROM CITY FUNDS

1. Total amount of funds requested from City HOME/CDBG funds: \$ N/A
 Or, total amount of requested fee waiver from the City of El Paso: \$ 500.00
2. Indicate use of all funds by category and amount (for those requesting HOME/CDBG funds):
- | | |
|---|----------|
| Acquisition: | \$ _____ |
| Design/Soft Costs: | \$ _____ |
| New Construction of Housing Units: | \$ _____ |
| Rehabilitation/Conversion of Housing Units: | \$ _____ |
| Funds from other sources: | \$ _____ |
| Total Project Cost: | \$ _____ |
3. Relocation of Tenants (for rehabilitation and/or reconstruction developments):
- How many of the existing dwelling units are occupied? _____ Vacant? _____
- If completely vacant, how long has the property been vacant? _____
- Are any of the units owner-occupied? _____
- Will Temporary or permanent relocation be required? _____
4. Section 3 Agreement (for those requesting HOME/CDBG funds): If the project construction amount totals more than \$200,000, the owner/contractor agrees to meet or exceed Section 3 requirements by: (1) awarding at least 20% of the total dollar amount of all covered construction contracts to Section 3 businesses; and (2) offering 50% of new employment opportunities to Section 3 businesses. Section 3 is a provision of the Housing and Urban Development (HUD) Act of 1968 that requires that recipients of certain HUD financial assistance, to the greatest extent feasible, provide job training, employment, and contracting opportunities for low- or very-low income residents in connection with projects and activities in their neighborhoods. The HOME and CDBG funds administered by the City necessitate following Section 3 provisions.
- Do you agree to meet or exceed the Section 3 requirements noted above? Yes No
5. Submit the following financial documents (for those requesting HOME/CDBG funds):
- Applicant's financial statement or most recent audit. Submit as Attachment C-5.a.
 - Applicant's Current Income Tax Return. Submit as Attachment C-5.b.

6. Submit the following Relocation documents (if applicable):

- a. Copy of Relocation Plan. Submit as Attachment C-6.a.
- b. Proof of approval of Relocation Plan by HUD. Submit as Attachment C-6.b.
- c. List of all households to be displaced, list must include date of issuance of General Information Notices and date of issuance of Relocation Notices for all households. Submit as Attachment C-6.c.

Please note: Phase I Environmental Assessment must be submitted to Community & Human Development for review prior to execution of any HOME or CDBG funding agreements.

SECTION D. CERTIFICATIONS

RETURN COMPLETED 9% LIHTC REQUESTS FOR MUNICIPAL RESOLUTION WITH ALL ATTACHMENTS NO LATER THAN JANUARY 6th, 2020 BY 9:00 AM (MST).

Hard copy and/or digital/email submissions are acceptable and must be delivered to:

Mark Weber, Community Development Program Manager
Community and Human Development Department
801 Texas Avenue – Third Floor
El Paso, Texas 79901
(915) 212-0138 or (915) 212-1682
webermc@elpasotexas.gov

Email submittals must contain less than 10 MB of attachments per email. As such, attachments for a single request may be submitted in multiple email transmissions.

4% HTC REQUESTS FOR MUNICIPAL RESOLUTION WILL BE ACCEPTED ON A ROLLING BASIS THROUGHOUT THE YEAR

Person authorized to sign on behalf of proposed development:

I/we declare that I/we have examined this request and, to the best of my/our knowledge and belief, the information contained therein is true, correct, and complete.

Signature (required): _____

Printed Name/Title: Roy Lopez, Senior Vice President

Date: 1/6/2020

FOR STAFF USE ONLY: Received by: _____ Date: _____

Review for Completeness by: _____

Sunset Vista Seniors Development Features Proposed to Meet TDHCA And City Of El Paso Project Evaluation Criteria

Project Summary

This proposed affordable housing apartment community will meet or exceed all of the desired living conditions promoted by TDHCA in this year's competitive housing tax credit application cycle.

Future residents will enjoy living in a luxurious and quiet senior community on a 1.89-acre site in a safe and vibrant neighborhood with a poverty rate of just 13.5%. Located at 1333 Pullman Drive in a 1st quartile census tract, residents will be close to supermarkets, retail outlets, restaurants, doctor and dentist offices, and a number of other neighborhood amenities and conveniences.

This 44-unit project will consist of 24 one-bedroom and 20 two-bedroom units that will serve all households as presented in the Unit Mix Schedule in Section B, Item 6. We have made every effort to provide the highest number of affordable units with the amount of tax credits available for this project.

In addition to all of the neighborhood amenities available to these residents, such as full-service grocery store, healthcare facility, proximity to public parks and public transportation, **the project amenities provided at no additional cost to the residents** are normally found only in upscale apartment communities. These amenities include: one covered parking space for each unit; a swimming pool; a fully furnished exercise facility in the clubhouse; a full complement of Energy-Star appliances including a large refrigerator; a gas stove and oven; a built-in microwave, a dishwasher and a full-size washer and dryer in each unit. The 2-story building will have a centrally located elevator and each floor will have its own community/recreation room. Energy-Star rated ceiling fans and lighting as well as all other mandatory development amenities not listed above will be provided as required by TDHCA.

The project will also incorporate many Green Building features to lower the impact on the local environment and provide utility cost savings to the residents. High efficiency 15-Seer refrigerated air conditioning will provide comfort as well as use less electricity and save on El Paso's scarce water resources by not using evaporative cooling. All windows will be Energy-Star rated and walls and ceilings will be insulated with R-15/R-30 values respectively. Native plants and drip irrigation will be used to conserve water as well.

Sunset Vista Seniors Development Features Proposed to Meet TDHCA And City Of El Paso Project Evaluation Criteria

Funding sources for this project are expected to come from (1) a conventional mortgage loan of \$1,460,000 at 5.25% interest with payments amortized over 35 years; (2) Freddie Mac required Completion and Stabilization deposits of \$102,200; (3) tax credit equity of \$5,431,135 and (4) deferred developer fee of \$141,722 to be paid from the project's operating cash flow during the initial 15-year compliance period. These amounts will provide the \$7,135,057 of total development funds needed to build this project.

Our goal is to provide safe, high quality affordable housing for economically disadvantaged individuals and families who are trying to improve their quality of life. Our experience of over 25 years in providing affordable housing to those in need has taught us that the Housing Tax Credit Program is the best method available to accomplish this goal while maintaining the financial viability to sustain the project over its extended affordability period of 35 years. Indeed, this project could not be built without an award of 9% tax credits.

How this development meets the criteria for Value Statement 2:

Sunset Vista Seniors will provide support to help its low-income residents break the cycle of poverty and support upward mobility by either directly providing or facilitating availability of social services in the following categories:

- a) Education – Sunset Vista Seniors, Ltd. has contracted with Better Texans Services, Inc. to provide (1) English as a second language classes; (2) computer training; (3) GED preparation classes; and (4) health education courses.
- b) Economic development – Sunset Vista Seniors, Ltd. has contracted with Tierra Del Sol Housing Corporation (TDS) to conduct training in Basic Financial Literacy Skills and Homebuyer Education. TDS will also assist families with Financial Management and Planning, and Credit Rebuilding.
- c) Supportive/social services – Sunset Vista Seniors, Ltd. has also contracted with Better Texans Services, Inc. to provide the following supportive/social services: (1) annual income tax preparation; (2) food pantry; (3) health fair; (4) Notary Services; and (5) on-site social events.

How this development meets the criteria for Value Statement 3:

Sunset Vista's residents will be afforded the opportunity for inclusiveness and access to public services by satisfying the following evaluation criteria:

Sunset Vista Seniors Development Features Proposed to Meet TDHCA And City Of El Paso Project Evaluation Criteria

- a) No physical barriers – The design of the development is such that it will have gateway openings at the perimeter fencing for the residents to access the surrounding neighborhoods and commercial businesses in the area. The site will have sidewalks and ADA compliant ramps along with paved parking areas, so that no physical barriers exist between the development, the neighborhood and commercial/public services.
- b) Gathering points – The design of the development includes a clubhouse with meeting space, kitchen & fitness center; gazebo; barbeque grills; and a heated swimming pool for the residents to gather and invite friends/families from the surrounding neighborhood to make the development and its residents a part of the existing community.
- c) Development has a mix of units at various income levels to include 80% AMI and/or market rate – The unit mix was created to incorporate various income levels. Eleven percent (11%) of the units will be offered to individuals/families at 30% AMI; twenty percent (20%) to those at 50% AMI; sixty-four percent (64%) to those at 60% AMI; and five percent (5%) of the units are market rate.

How this development meets the criteria for Value Statement 4:

The applicant has a local presence and long-term accountability in El Paso:

- a) Past experience – Investment Builders, Inc. (IBI) is a Texas corporation formed in September, 1993 and completed its first tax credit project in El Paso in 1995. IBI has since developed, built, managed and owned more than 40 affordable housing developments containing more than 3,000 units serving residents at or below 60% of the Area Median Family Income. Thirty of these projects are in the City of El Paso.
- b) A staff presence in El Paso of at least 5 employees – IBI is led by highly qualified and professional individuals, each providing extensive experience in their respective areas. IBI currently has a full-time office staff of 6 employees and a full-time field staff of 4 employees, all working from its office located at 7400 Viscount, Suite 109, El Paso, Texas 79925. Each of these employees has been with the Company for more than 10 years.
- c) With 5 or more years of experience as part of a development team, financing, building, operating or managing affordable housing in El Paso – As noted in item 4(a) above, IBI has been involved in every phase of developing, obtaining financing, building, owning and managing affordable housing since 1993.

Sunset Vista Seniors Development Features Proposed to Meet TDHCA And City Of El Paso Project Evaluation Criteria

- d) An historic commitment to affordable housing as demonstrated by holding, managing and operating an affordable housing development for at least 10 years in El Paso – As noted in items 4(a) and 4(c) above, IBI has been involved in every phase of developing, obtaining financing, building, owning and managing affordable housing in El Paso for more than 25 years, since 1993.

How this development meets the criteria for Value Statement 5:

Sunset Vista Seniors meets City smart growth initiative as set out in Plan El Paso by meeting the following policy goals:

The final design and construction of the development will adhere to smart growth general design principles to ensure that it accommodates and maximizes the social, economic and environmental opportunities of the smart growth plan for El Paso. It will be an infill development surrounded by existing neighborhoods and will have proposed commercial development adjacent to the site to incorporate the live, dine and shop principles of smart growth communities. Pursuant to receiving a support letter from the City of El Paso and award by TDHCA, the final design will incorporate the following smart growth elements; see attached site plan for additional detailing:

- The proposed development will be designed to promote a pedestrian-friendly environment through connected sidewalks, pathways, greenbelts, and open areas.
- The proposed development will accommodate a range of transportation choices where possible, including a network of transit, pedestrian and bicycle systems that provide alternative to the automobile.
- The streets and driveways are of comfortable scale and interconnectivity to reduce the number and length of automobile trips, and are laid out in a network to serve both vehicles and pedestrians.
- The buildings and landscaping within the proposed development contribute to the physical definition of streets as civic places.
- The buildings relate to and are oriented toward the street so that parking lots do not dominate the public space by more than fifty (50) percent of the area along the primary abutting street.
- The site planning is sensitive to the natural site resources – hydrology, terrain, geology, ecology, and vegetation – and clustering will be incorporated to preserve these resources where possible.

Sunset Vista Seniors Development Features Proposed to Meet TDHCA And City Of El Paso Project Evaluation Criteria

- The buildings conform in scale, form and character throughout the proposed development to ensure compatibility of the area.
- Overall, the proposed development enhances good urban design, scale, diversity, and proper integration to achieve quality growth.
- Where a public street is adjacent to the property line, direct pedestrian and bicycle access from that street to the entrance will be provided.

This developer hereby acknowledges and commits itself to the items listed on this narrative, upon receiving a support letter from the City of El Paso and award of this development from TDHCA.

CONTRACT FOR DELIVERY OF SOCIAL SERVICES

This Contract for Delivery of Social Services (this "Agreement") is made and entered into this 1st day of January 2019, by and between Sunset Vista Seniors, Ltd., a Texas Limited Partnership ("Owner"), and Better Texans Services, Inc., a Texas corporation ("Contractor").

WITNESSETH:

WHEREAS, Owner is developing and will own and operate a 46 unit senior (multi-family/senior) development known as Sunset Vista Seniors (the "Property") located in El Paso, Texas; and

WHEREAS, Owner desires to engage Contractor to coordinate the provision of certain services for the residents of the Property more particularly described in Exhibit A, attached hereto and incorporated herein for all purposes; and

WHEREAS, Contractor desires to coordinate the provision of such services for and on behalf of Owner under and pursuant to the terms of this Agreement.

AGREEMENT

NOW, THEREFORE, for and in consideration of the premises and the mutual covenants contained herein, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto hereby agree as follows:

1. Services to be Rendered by Contractor.

(a) For and during the full term of this Agreement, Contractor shall, on behalf of Owner and in accordance with the terms of this Agreement, coordinate and document the provision of the services described in Exhibit A attached hereto and incorporated herein for all purposes (collectively, the "Services").

(b) Contractor agrees that the Services will be provided at no cost to the residents of the Project. The Services will be provided at appropriate facilities on-site at the Property or at other appropriate off-site locations.

(c) Consistent with Section 13 hereof, neither Contractor nor Owner shall change the Services provided from those described on Exhibit A without a written agreement to amend this Agreement, signed by both parties.

2. Payment for Services; Reimbursement.

(a) As consideration for Contractor's coordination of the Services, Owner shall pay Contractor the amount indicated below (the "Service Fee") in accordance with the following:

The sum of Two hundred thirty and 00/100 Dollars (\$230.00) monthly. Each invoice submitted to Owner shall be paid by Owner to Contractor within thirty (30) days of receipt by Owner. The Service Fee shall increase at each renewal term by not more than three and one half percent (3.5%).

- (b) The Service Fee shall be paid as follows:

The Service Fee shall be paid as an operating expense of Owner, before Owner distributes any of its net cash flow to its partners or their affiliates.

(c) To the extent any of the Services required by Owner hereunder mandate the payment of out-of-pocket expenses, Owner shall be responsible for the payment of those expenses, directly to the vendor. Contractor shall have no responsibility for paying such expenses. Notwithstanding the foregoing, if Contractor does pay an out-of-pocket expense on Owner's behalf in conjunction with coordinating the Services hereunder, Owner shall promptly reimburse Contractor for such expenditure, within five (5) days of Owner's receipt of an invoice for same. Out-of-pocket expenses may include, but are not limited to, transportation to off-site services, on-site instructors, off-site courses, and program supplies.

3. Term. Subject to the other provisions hereof, the obligations of the parties to this Agreement shall commence on the date that the first tenant moves in to the Property and shall continue for a period of one year thereafter (the "**Initial Term**"). Owner shall provide Contractor notice in writing 30 days before commencement date. Thereafter, the Agreement shall automatically renew in one year increments (each, a "**Renewal Term**") up to fourteen Renewal Terms. Notwithstanding the foregoing, this Agreement may be terminated in the Initial Term or any Renewal Term as follows:

- (a) upon the mutual written consent of the parties hereto;

(b) by either party provided that the terminating party has given the non-terminating party at least thirty (30) days advance written notice of its decision to terminate the Agreement;
or

(c) in the event the one party believes the other party has defaulted in the performance of its obligations under this Agreement, then the non-defaulting party shall provide the defaulting party with a written notice detailing such default; the defaulting party shall then have five (5) business days after the date of such notice to cure such default to the non-defaulting party's satisfaction; if the defaulting party fails to cure such default to the non-defaulting party's satisfaction in such time period, the non-defaulting party shall have the right to terminate this Agreement immediately without further action.

Upon termination of this Agreement, all accrued but unpaid Service Fee shall be paid by Owner to Contractor.

4. Access and Cooperation. Owner agrees to allow Contractor and its agents, employees and subcontractors access to the Project during all reasonable hours.

5. Indemnity and Insurance.

(a) Contractor agrees to indemnify, defend and hold harmless Owner from and against any and all manner of actions, judgments, claims, demands, liabilities, obligations and causes of action (including reasonable costs and attorneys' fees) arising from or incident to any negligence or willful misconduct of Contractor, its employees, officers, or directors in fulfilling the terms of this Agreement.

(b) To the extent that Owner is allowed under its policy, Owner shall add Contractor as an additional insured to its existing general liability policy which covers the Property.

(c) Owner hereby indemnifies and saves harmless Contractor, as well as its directors, officers, partners, employees, agents, successors and assigns from and against any and all manner of actions, judgments, claims, demands, liabilities, obligations and cause of action (including reasonable costs and attorneys' fees) arising from or incident to the Property, other than those arising from or incident to any negligence or willful misconduct of Contractor, its employees, officers, or directors in fulfilling the terms of this Agreement.

6. Independent Contractor. The parties understand and agree that Contractor is an independent contractor engaged in the operation of its own business, that Contractor and its employees shall not be considered to be an agent for employee of, or venturer with, Owner for any purpose whatsoever and further agree that Contractor has no general authority to enter into any contract, assume any obligations, or make any warranties or representations on behalf of Owner. Contractor and its employees shall perform all their duties and the services described herein in a manner consistent with this Agreement and the policies generally applicable to the Property. Contractor and its employees will identify and represent to all persons, firms, companies and regulatory authorities that Contractor and its employees are independent contractors and not employees or agents of Owner.

7. Exclusive Agreement. In consideration of Contractor entering into this Agreement, Owner agrees that during the term of this Agreement Owner shall not enter any agreement with a third party for the furnishing of similar services without the prior written consent of Contractor.

8. Binding Effect. This Agreement is binding upon and shall inure to the benefit of the parties hereto and their respective representatives, successors and assigns.

9. Entire Agreement. This Agreement represents the entire agreement between the parties hereto and supersedes all prior and contemporaneous agreements, representations and undertakings regarding the subject matter hereof.

10. Headings. The subject headings contained in this Agreement are for reference purposes only and do not affect in any way the meaning or interpretation hereof.

11. Severability. In case any one or more of the provisions contained in this Agreement for any reason are held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability will not affect any other provision hereof, and this Agreement will be construed as if such invalid, illegal or unenforceable provision had never been contained herein.

12. Notices. Any notice to be given hereunder must be in writing and shall be deemed given (a) when delivered in person against receipt thereof, (b) two business days after deposited in the United States mail as certified or registered mail, return receipt requested, postage prepaid, (c) when delivered by a commercial courier or messenger service against receipt thereof or (d) when transmitted by telecopier with confirmed answerback, and addressed as follows:

If to Owner:

Sunset Vista Seniors, Ltd.
7400 Viscount Blvd., Suite 109
El Paso, TX 79925
Attention: Ray Lopez
Phone: 915-599-1245
Email: rlopez@ibitoday.com

If to Contractor:

P.O. Box 101295
Fort Worth, TX 76185
Telephone No.: (817) 585-1195
Facsimile No.: (817) 231-0161
Attention: Aubrea Hance

Either party may specify a new address or additional addresses at any time by notice in writing to the other party given in the manner hereinabove provided.

13. Amendment to Agreement. This Agreement may only be amended by written instrument signed by the parties hereto.

14. Applicable Law. This Agreement will be governed and construed in accordance with the laws of the State of Texas.

15. Assignment. This Agreement may not be assigned by any party hereto without the express written consent of each other party.

16. Attorneys' Fees. Should any party employ an attorney or attorneys to enforce any of the provisions hereof, to protect its interest in any manner arising under this Agreement, or to recover damages for the breach of this Agreement, the non-prevailing party in any action pursued in courts of competent jurisdiction (the finality of which is not legally contested) agrees to pay to the prevailing party all reasonable costs, damages and expenses, including specifically, but without implied limitation, attorneys' fees, expended or incurred by the prevailing party in connection therewith.

17. Jurisdiction and Venue. The parties agree that the exclusive jurisdiction and venue for any suit, action or proceeding arising out of this Agreement shall be any state or federal court sitting in Tarrant County, Texas, and each party waives, to the extent permitted by law, any and all objections to such jurisdiction and venue.

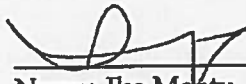
IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date and year first above set forth.

OWNER:

Sunset Vista Seniors, Ltd.,
a Texas Limited Partnership

By: Investment Builders Inc.
its general partner

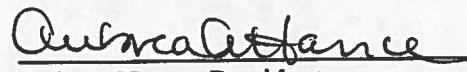
By:


Name: Ike Monty
Title: President

CONTRACTOR:

Better Texans Services, Inc.
a Texas corporation

By:


Aubrea Hance, President

SUNSET VISTA SENIORS - EXHIBIT A (1 of 2)

SERVICES

Contractor hereby agrees to coordinate a combination of services from the following list to ensure a total of ten (10) points:

(A) Transportation Supportive Services

- (i) shuttle, at least three days a week, to a grocery store and pharmacy and/or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points);
- (ii) monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, etc. (1 point);

(B) Children Supportive Services

- (i) Provide a High Quality Pre-Kindergarten (HQ Pre-K) program and associated educational space at the Development Site meeting the requirements of 10 TAC §11.101(b)(5)(C)(i)(I). (Half of the points required under 10 TAC §11.101(b)(7));
- (ii) 12 hours of weekly, organized, on-site services provided to K-12 children by a dedicated service coordinator or third-party entity. Services include after-school and summer care and tutoring, recreational activities, mentee opportunities, test preparation, and similar activities that promote the betterment and growth of children and young adults (3.5 points);

(C) Adult Supportive Services

- (i) 4 hours of weekly, organized, on-site classes provided to an adult audience by persons skilled or trained in the subject matter being presented, such as character building programs, English as a second language classes, computer training, financial literacy courses, health education courses, certification courses, GED preparation classes, resume and interview preparatory classes, general presentations about community services and resources, and any other course, class, or presentation that may equip residents with new skills that they may wish to develop (3.5 points);
- (ii) annual income tax preparation (offered by an income tax prep service) or IRS- certified VITA (Volunteer Income Tax Assistance) program (offered by a qualified individual) that also emphasizes how to claim the Earned Income Tax Credit (1 point);
- (iii) contracted career training and placement partnerships with local worksource offices, culinary programs, or vocational counseling services; also resident training programs that train and hire residents for job opportunities inside the development in areas like leasing, tenant services, maintenance, landscaping, or food and beverage operation (2 points);
- (iv) external partnerships for provision of weekly substance abuse meetings at the Development Site (1 point);

(D) Health Supportive Services

- (i) Food pantry consisting of an assortment of non-perishable food items and common household items (i.e. laundry detergent, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a resident. While it is possible that transportation may be provided to a local food bank to meet the requirement of this resident service, the resident must not be required to pay for the items they receive at the food bank (2 points);
- (ii) annual health fair provided by a health care professional (1 point);
- (iii) weekly exercise classes (offered at times when most residents would be likely to attend) (2 points);

SUNSET VISTA SENIORS - EXHIBIT A (2 of 2)

SERVICES

(iv) contracted onsite occupational or physical therapy services for Elderly Developments or Developments where the service is provided for Persons with Disabilities and documentation to that effect can be provided for monitoring purposes (2 points);

(E) Community Supportive Services

(i) partnership with local law enforcement and/or local first responders to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.) (2 points);

(ii) Notary Services during regular business hours (§2306.6710(b)(3)) (1 point);

(iii) twice monthly arts, crafts, and other recreational activities (e.g. Book Clubs and creative writing classes) (1 point);

(iv) twice monthly on-site social events (i.e. potluck dinners, game night, sing-a-longs, movie nights, birthday parties, holiday celebrations, etc.) (1 point);

(v) specific case management services offered by a qualified Owner or Developer, qualified provider or through external, contracted parties for seniors, Persons with Disabilities or Supportive Housing (3 points);

(vi) weekly home chore services (such as valet trash removal, assistance with recycling, furniture movement, etc., and quarterly preventative maintenance including light bulb replacement) for Elderly Developments or Developments where the service is provided for Persons with Disabilities and documentation to that effect can be provided for monitoring purposes (2 points);


(vii) any of the programs described under Title IV-A of the Social Security Act (42 U.S.C. §§601, et seq.) which enables children to be cared for in their homes or the homes of relatives; ends the dependence of needy families on government benefits by promoting job preparation, work and marriage; prevents and reduces the incidence of unplanned pregnancies; and encourages the formation and maintenance of two-parent families (1 point);

(viii) a part-time resident services coordinator with a dedicated office space at the Development or a contract with a third-party to provide the equivalent of 15 hours or more of weekly resident supportive services at the Development (2 points);

provision, by either the Development Owner or a community partner, of an education tuition- or savings-match program or scholarships to residents who may attend college (2 points).

Agreed:

For Owner:



Name: Ike Monty
Title: President

For Contractor:



Aubrea Hance, President



Tierra Del Sol Housing Corporation

Tierra Del Sol Housing Corporation Resident Financial Literacy and Homebuyer Education Program

Tierra Del Sol Housing Corporation "TDS" will conduct training in Basic Financial Literacy Skills and Homebuyer Education to Sunset Vista Seniors residents. Training will be provided to all residents on-site in Sunset Vista Seniors' community room. Training will be provided quarterly including the following program subjects:

- Homebuyer education
- Identifying strategies for increasing income
- Developing critical thinking skills to support financial decision making
- Identifying and obtaining jobs that pay enough to meet basic needs
- Understanding employment stability
- Avoiding loans, fees, and practices that are exploitive, fraudulent, and predatory
- Using debt intelligently to acquire appreciating assets
- Identity theft prevention strategies
- Credit rebuilding strategies
- Creating a community network for information and support

Individual family coaching will also be provided to assist residents with financial management and planning and credit rebuilding.

TDS Resident Financial Literacy/Homebuyer Education Program staff has extensive experience in Financial Literacy Training and Counseling. Homebuyer Education and Basic Financial Literacy Skills Class will be offered four (4) times per year. The scheduling of the sessions will be offered to all residents at pre-arranged, convenient times. In addition, the Financial Literacy Program can be customized to address the specific financial needs of the residents.

Resident Financial Literacy Training Program Budget

The Financial Literacy/Homebuyer Education Program budget will include:

- \$3,000 annually will be provided from the Sunset Vista Seniors operating budget for program expenses
- Computer/internet will be available to the Sunset Vista Seniors' residents for the Financial Literacy programming and Homebuyer Education purpose in the clubhouse
- TDS will provide financial literacy instructors/counselors to teach classes and provide individual family coaching services

Tenant Recruitment and Participation

Sunset Vista Seniors residents will be highly encouraged to participate in the Resident Financial Literacy Training Program. TDS staff, in conjunction with property management staff, will market the program with informational flyers and periodic events held in the clubhouse to identify and recruit prospective residents. Financial literacy program goals and requirements will be clearly articulated to residents so that the expectations are understood for the various training sessions. TDS experience with training programs at existing developments is that resident participation is facilitated when information is conveyed in a clear, friendly, and supportive manner.

Rose Garcia
Executive Director

Date





