



# Harrisonburg Redevelopment & Housing Authority

P.O. BOX 1071 + HARRISONBURG, VA 22803

Phone/VTDD 540-434-7386 + Fax 540-432-1113

February 11, 2022

The Regular Meeting of the Harrisonburg Redevelopment and Housing Authority's Board of Commissioners will be held on **Wednesday, February 16, 2022 at 4:00 p.m.** In accordance with the Emergency Resolution to effectuate temporary changes in certain deadlines and to modify public meeting and public hearing practices and procedures to address continuity of operations associated with pandemic disaster, adopted on January 11, 2022, the public will not be able to physically attend the Harrisonburg Redevelopment and Housing Authority board meeting.

Residents also may provide comment prior to the meeting by emailing:  
[wongway@harrisonburgrha.com](mailto:wongway@harrisonburgrha.com)

Residents will be able to watch the meeting live on:

- The City's website, <https://www.harrisonburgva.gov/agendas>
- Public Education Government Channel 3

Michael G. Wong  
Executive Director

Enclosures

EQUAL HOUSING OPPORTUNITY PROVIDER

HRHA provides reasonable accommodations to persons with disabilities consistent with the Section 504 Final Rule (24 CFR Part 8) and the Fair Housing Amendments Act

**AGENDA**  
**Regular Meeting**  
**February 16, 2022**

- I. Call to order and determination of quorum
- II. Review and Approval of Minutes
  - January 19, 2022
- III. Review and Approval Financial Statements
  - January 2022
- IV. Reports
  - A. Executive Director
    1. Public Comment
    2. Shenandoah Housing Corporation and Lineweaver Annex Corporation Board of Directors Agreement
    3. HUD REAC-FASS 2021 Submission
    4. RFP Project Base Voucher-Simms Pointe Landing
    5. United Bank Resolution
  - B. Any New Business/ Old Business
    1. Strategic Initiatives Updates
      - Homeownership and Neighborhood Revitalization
        - Erikson Avenue Town Center
        - Lineweaver Annex Renovation
      - Addressing Homelessness and Affordable Housing
        - Virginia Homeless Solutions Collaborative Applicant Grant- February 2022
      - Improving Organizational Efficiency and Effectiveness
        - MTW
        - Yardi Software Migration
  - C. Management Reports
    1. Housing Choice Voucher Management Report
    2. J.R. "Polly" Lineweaver/Lineweaver Annex Program Management Report
    3. Franklin Heights Program Management Report
    4. Commerce Village Management Report
    5. Family Self Sufficiency Management Report
    6. Financial Monthly Report & Quarterly Investment Update
    7. Complaints Monthly Report Update

board and council. He stated of the format usually consisting of two members from each body and including a city staff representative and the authority's executive director. He related that usual term is 1 year and proposed that the board chair and vice chair be the initial representatives. After a period of discussion, the board approved the chair and vice chair as city liaisons with four votes in favor and one nay.

Mr. Wong then provided a brief overview of the strategic initiatives, addressing homelessness and improving organizational efficiency and effectiveness. He related that the authority successfully received an Affordable Housing and Special Needs award of \$900,000 and housing innovations in energy efficiency award of \$420,000 from the Virginia Department of Housing and Community Development for renovation of Lineweaver Annex. He stated of the architects have done a site visit and hope to close on the construction financing in February. He stated that the Erickson Plaza project team has been meeting biweekly and have revised its site plan and unit count to reflect the town center concept. He stated of the project requiring a full transportation study which will delay the rezoning process. Mr. Wong stated that the CoC will be conducting its annual point in time count in January and anticipates that the collaborative grant application will be released in February. He stated that HUD has asked for additional clarification of the Authority's MtW plan and anticipates approval in late January. He related that the software migration is on track with the migration approaching its critical implementation stage.

Mr. Wong then presented the management reports. After a period of discussion, Commissioner Benjamin seconded by Vice Chair Fasching Maphis then made the motion to approve the management reports. The motion was unanimously approved.

Vice Chair Fasching Maphis by Commissioner Colman made the motion to adjourn. The motion was unanimously approved.

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Michael G. Wong  
Executive Director

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Dany Fleming  
Chair

**LOCAL COMMUNITY DEVELOPMENT (LCD)**  
Statement of Revenues, Expenses, and Changes in Fund Equity  
For the Month of January 2022

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3410 HMIS COC Homelessness Grant-19	84,072.00	7,006.00	0.00	0.00	7,006.00	(7,006.00)
3410 VHSP-VA Hsg Solutions Prgm Grant	59,391.00	4,949.25	23,568.96	23,568.96	4,949.25	18,619.71
3410 COC Planning Grant Funds	21,161.00	1,763.42	3,708.68	3,708.68	1,763.42	1,945.26
3610 Interest Income	0.00	0.00	33.66	33.66	0.00	33.66
3690 Developer's Fees/Other Income	180,000.00	15,000.00	0.00	0.00	15,000.00	(15,000.00)
3690 Bond Application Fees	15,000.00	1,250.00	0.00	0.00	1,250.00	(1,250.00)
3690 Lease Income	0.00	0.00	0.00	0.00	0.00	0.00
3690 Management Fees	11,000.00	916.67	958.64	958.64	916.67	41.97
3690 BPort Net Receipts	190,456.00	15,871.33	14,262.13	14,262.13	15,871.33	(1,609.20)
3690 Lineweaver Apts. Net Receipts	485,280.00	40,440.00	29,519.69	29,519.69	40,440.00	(10,920.31)
Total Receipts	1,046,360.00	87,196.67	72,051.76	72,051.76	87,196.67	(15,144.91)
<b>Expenses:</b>						
<b>Administration</b>						
4110 Adm Salaries	215,770.00	17,980.83	12,327.10	12,327.10	17,980.83	(5,653.73)
4540 Adm Benefits	64,731.00	5,394.25	2,420.27	2,420.27	5,394.25	(2,973.98)
4130 Legal Expense	10,000.00	833.33	0.00	0.00	833.33	(833.33)
4140 Staff Training	5,000.00	416.67	0.00	0.00	416.67	(416.67)
4150 Travel	5,000.00	416.67	400.00	400.00	416.67	(16.67)
4171 Auditing Fees	5,000.00	416.67	0.00	0.00	416.67	(416.67)
4190 Sundry-Admin. Exp.	35,000.00	2,916.67	2,553.21	2,553.21	2,916.67	(363.46)
4190 VHSP-VA Hsg Solutions Prgm Grant	59,391.00	4,949.25	1,934.92	1,934.92	4,949.25	(3,014.33)
4190 COC Planning Grant Expenses	21,161.00	1,763.42	3,708.68	3,708.68	1,763.42	1,945.26
4192 CHERP Grant Expenses (WRM)	47,279.00	3,939.92	7,957.81	7,957.81	3,939.92	4,017.89
4190 CHERP-CDBG-CV Grant Expenses	0.00	0.00	83,841.00	83,841.00	0.00	83,841.00
4190 Community Donations (OpDr/COC, etc)	10,000.00	833.33	0.00	0.00	833.33	(833.33)
4190 HMIS Homeless Assistance-20	84,072.00	7,006.00	23,092.06	23,092.06	7,006.00	16,086.06
Total Administration	562,404.00	46,867.00	138,235.05	138,235.05	46,867.00	91,368.05
<b>Utilities</b>						
4320 Electric	2,500.00	208.33	119.07	119.07	208.33	(89.26)
4330 Gas	1,500.00	125.00	0.00	0.00	125.00	(125.00)
Total Utilities	4,000.00	333.33	119.07	119.07	333.33	(214.26)
<b>Maintenance</b>						
4410 Maintenance Salaries	44,140.00	3,678.33	5,401.24	5,401.24	3,678.33	1,722.91
4540 Maintenance Benefits	13,242.00	1,103.50	1,106.79	1,106.79	1,103.50	3.29
4420 Materials	4,000.00	333.33	128.88	128.88	333.33	(204.45)
4430 Contract Costs	6,000.00	500.00	188.90	188.90	500.00	(311.10)
Total Maintenance	67,382.00	5,615.17	6,825.81	6,825.81	5,615.17	1,210.64
<b>General</b>						
4510 Insurance	8,000.00	666.67	623.88	623.88	666.67	(42.79)
4570 Collection Loss/Bad Debt Expens	0.00	0.00	0.00	0.00	0.00	0.00
4000 Bport Expenses	32,900.00	2,741.67	2,979.68	2,979.68	2,741.67	238.01
4000 Lineweaver Apartments Expenses	390,580.00	32,548.33	24,610.61	24,610.61	32,548.33	(7,937.72)
Total General	431,480.00	35,956.67	28,214.17	28,214.17	35,956.67	(7,742.50)
<b>TOTAL EXPENSES</b>	<b>1,065,266.00</b>	<b>88,772.17</b>	<b>173,394.10</b>	<b>173,394.10</b>	<b>88,772.17</b>	<b>84,621.93</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>72,051.76</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>173,394.10</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>(101,342.34)</b>

Michael G. Wong, Executive Director

Date



**BRIDGEPORT COMPLEX**  
Statement of Revenues, Expenses, and Changes in Fund Equity  
Attachment B  
For the Month of January 2022

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3690 Rental Income	190,456.00	15,871.33	14,262.13	14,262.13	15,871.33	(1,609.20)
3690 Other Income	0.00	0.00	0.00	0.00	0.00	0.00
Total Receipts	190,456.00	15,871.33	14,262.13	14,262.13	15,871.33	(1,609.20)
<b>Expenses:</b>						
<b>Operations</b>						
4130 Legal Expenses	2,500.00	208.33	0.00	0.00	208.33	(208.33)
4190-Sundry-Phone	600.00	50.00	41.61	41.61	50.00	(8.39)
Total Op. Expenses	3,100.00	258.33	41.61	41.61	258.33	(216.72)
<b>Utilities:</b>						
4310 Water	800.00	66.67	0.00	0.00	66.67	(66.67)
4320 Electricity	0.00	0.00	0.00	0.00	0.00	0.00
4330 Gas	0.00	0.00	0.00	0.00	0.00	0.00
4310 Sewer	0.00	0.00	0.00	0.00	0.00	0.00
Total Utilities	800.00	66.67	0.00	0.00	66.67	(66.67)
<b>Maintenance:</b>						
4420 Materials	3,000.00	250.00	0.00	0.00	250.00	(250.00)
4430 Contract Costs	10,000.00	833.33	1,530.97	1,530.97	833.33	697.64
Total Maintenance	13,000.00	1,083.33	1,530.97	1,530.97	1,083.33	447.64
<b>General Expenses:</b>						
4510 Insurance Expenses	0.00	0.00	0.00	0.00	0.00	0.00
4580 Interst Expense	16,000.00	1,333.33	1,407.10	1,407.10	1,333.33	73.77
Total General Exp.	16,000.00	1,333.33	1,407.10	1,407.10	1,333.33	73.77
<b>TOTAL EXPENSES</b>	<b>32,900.00</b>	<b>2,741.67</b>	<b>2,979.68</b>	<b>2,979.68</b>	<b>2,741.67</b>	<b>238.01</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>14,262.13</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>2,979.68</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>11,282.45</b>

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT  
TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
\_\_\_\_\_  
Michael G. Wong  
Executive Director

  
\_\_\_\_\_  
Date

Please note: A principal payment to Bank of the James was made in the amount of \$2,212.90 for a total of \$13,113.58 for this fiscal year.

**LINEWEAVER ANNEX APARTMENTS**  
Statement of Revenues, Expenses, and Changes in Fund Equity  
Attachment A  
For the Month of January 2022

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Rental Income	238,140.00	19,845.00	15,210.00	15,210.00	19,845.00	(4,635.00)
3410 HAP Funding	238,140.00	19,845.00	14,053.00	14,053.00	19,845.00	(5,792.00)
3690 Other Income-Laundry	4,000.00	333.33	122.19	122.19	333.33	(211.14)
3890 Other Income-Late fees,workordr	5,000.00	416.67	134.50	134.50	416.67	(282.17)
<b>Total Receipts</b>	<b>485,280.00</b>	<b>40,440.00</b>	<b>29,519.69</b>	<b>29,519.69</b>	<b>40,440.00</b>	<b>(10,920.31)</b>
<b>Expenses:</b>						
<b>Administration:</b>						
4110 Adm Salaries	81,112.00	6,759.33	4,227.34	4,227.34	6,759.33	(2,531.99)
4540 Adm Benefits	24,334.00	2,027.83	1,233.83	1,233.83	2,027.83	(794.00)
4130 Legal Fees	1,500.00	125.00	0.00	0.00	125.00	(125.00)
4140 Staff Training	1,000.00	83.33	0.00	0.00	83.33	(83.33)
4150 Travel	1,000.00	83.33	0.00	0.00	83.33	(83.33)
4171 Auditing	1,250.00	104.17	0.00	0.00	104.17	(104.17)
4190 Sundry	18,000.00	1,500.00	407.75	407.75	1,500.00	(1,092.25)
<b>Total Administration</b>	<b>128,196.00</b>	<b>10,683.00</b>	<b>5,868.92</b>	<b>5,868.92</b>	<b>10,683.00</b>	<b>(4,814.08)</b>
<b>Tenant Services:</b>						
4240 Tenant Services-Other	1,000.00	83.33	0.00	0.00	83.33	(83.33)
<b>Total Tenant Serv.</b>	<b>1,000.00</b>	<b>83.33</b>	<b>0.00</b>	<b>0.00</b>	<b>83.33</b>	<b>(83.33)</b>
<b>Utilities:</b>						
4310 Water	10,000.00	833.33	656.97	656.97	833.33	(176.36)
4320 Electricity	63,000.00	5,250.00	5,947.25	5,947.25	5,250.00	697.25
4390 Sewer	24,000.00	2,000.00	1,698.60	1,698.60	2,000.00	(301.40)
<b>Total Utilities</b>	<b>97,000.00</b>	<b>8,083.33</b>	<b>8,302.82</b>	<b>8,302.82</b>	<b>8,083.33</b>	<b>219.49</b>
<b>Maintenance:</b>						
4410 Maintenance Salaries	62,603.00	5,216.92	4,526.14	4,526.14	5,216.92	(690.78)
4540 Maintenance Benefits	18,781.00	1,565.08	724.66	724.66	1,565.08	(840.42)
4420 Materials	18,000.00	1,500.00	301.39	301.39	1,500.00	(1,198.61)
4430 Contract Costs	50,000.00	4,166.67	4,072.71	4,072.71	4,166.67	(93.96)
<b>Total Maintenance</b>	<b>149,384.00</b>	<b>12,448.67</b>	<b>9,624.90</b>	<b>9,624.90</b>	<b>12,448.67</b>	<b>(2,823.77)</b>
<b>General Expenses:</b>						
4510 Insurance Expenses	10,000.00	833.33	813.97	813.97	833.33	(19.36)
4570 Collection Loss	5,000.00	416.67	0.00	0.00	416.67	(416.67)
<b>Total General Exp.</b>	<b>15,000.00</b>	<b>1,250.00</b>	<b>813.97</b>	<b>813.97</b>	<b>1,250.00</b>	<b>(436.03)</b>
<b>TOTAL EXPENSES</b>	<b>390,580.00</b>	<b>32,548.33</b>	<b>24,610.61</b>	<b>24,610.61</b>	<b>32,548.33</b>	<b>(7,937.72)</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>29,519.69</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>24,610.61</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>4,909.08</b>

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT  
TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
Lisa Benasher, Lineweaver Manager

2-8-2022  
Date

**Housing Choice Voucher Program (HCV)-Move To Work**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**For the Month of January 2022**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts</b>						
3300RC Adm-Fraud/Abuse/Set Off Del	7,000.00	583.33	1,316.00	1,316.00	583.33	732.67
3300RC HAP-Fraud/Abuse/Set Off Del	7,000.00	583.33	1,316.00	1,316.00	583.33	732.67
3300 FSS Fort.	2,000.00	166.67	0.00	0.00	166.67	(166.67)
3300 Portability Fee Income	0.00	0.00	0.00	0.00	0.00	0.00
3610 Interest-HAP	0.00	0.00	0.00	0.00	0.00	0.00
3610 Interest-Adm	0.00	0.00	0.00	0.00	0.00	0.00
3410 HCV FSS Grant Funds*	63,000.00	5,250.00	0.00	0.00	5,250.00	(5,250.00)
3410 HCV HAP Payment-Adm Fees	568,644.00	47,387.00	46,891.00	46,891.00	47,387.00	(496.00)
3410 HCV HAP Payment-HAP Fees	5,897,254.00	491,437.83	496,962.00	496,962.00	491,437.83	5,524.17
<b>Total Receipts</b>	<b>6,544,898.00</b>	<b>545,408.17</b>	<b>546,485.00</b>	<b>546,485.00</b>	<b>545,408.17</b>	<b>1,076.83</b>
<b>Expenses</b>						
<b>Administration</b>						
4110 Adm Salaries	347,147.00	28,928.92	24,559.64	24,559.64	28,928.92	(4,369.28)
4110 FSS Salaries (grant portion)*	47,000.00	3,916.67	3,916.66	3,916.66	3,916.67	(0.01)
4540 Adm/FSS Benefits	114,675.00	9,556.25	7,064.92	7,064.92	9,556.25	(2,491.33)
4540 FSS Benefits*	13,500.00	1,125.00	1,171.60	1,171.60	1,125.00	46.60
4130 Legal Fees	2,500.00	208.33	0.00	0.00	208.33	(208.33)
4140 Staff Training	5,000.00	416.67	0.00	0.00	416.67	(416.67)
4140 FSS Staff Training	2,500.00	208.33	0.00	0.00	208.33	(208.33)
4150 Travel	5,000.00	416.67	0.00	0.00	416.67	(416.67)
4171 Auditing Fees	9,040.00	753.33	0.00	0.00	753.33	(753.33)
4190 Sundry	60,000.00	5,000.00	6,442.39	6,442.39	5,000.00	1,442.39
4190.3 Rent & Utility Adj	0.00	0.00	0.00	0.00	0.00	0.00
4190.2 Portability Fees	2,000.00	166.67	120.63	120.63	166.67	(46.04)
4190.4 LL Incentives-CARES Act	15,000.00	1,250.00	4,250.00	4,250.00	1,250.00	3,000.00
<b>Total Administration</b>	<b>623,362.00</b>	<b>51,946.83</b>	<b>47,525.84</b>	<b>47,525.84</b>	<b>51,946.83</b>	<b>(4,420.99)</b>
<b>Utilities</b>						
4310 Water	0.00	0.00	0.00	0.00	0.00	0.00
4320 Electric	4,000.00	333.33	482.51	482.51	333.33	149.18
4330 Gas	2,000.00	166.67	467.88	467.88	166.67	301.21
4390 Sewer	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Utilities</b>	<b>6,000.00</b>	<b>500.00</b>	<b>950.39</b>	<b>950.39</b>	<b>500.00</b>	<b>450.39</b>
<b>Maintenance</b>						
4420 Maintenance Salaries	0.00	0.00	0.00	0.00	0.00	0.00
4540 Maintenance Benefits	0.00	0.00	0.00	0.00	0.00	0.00
4420 Materials	0.00	0.00	0.00	0.00	0.00	0.00
4430 Contract Costs (Unit Inspections)	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total Maintenance</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>General</b>						
4510 Insurance	8,530.00	856.33	658.58	658.58	856.33	(197.75)
4570 Collection Loss	0.00	0.00	0.00	0.00	0.00	0.00
4715 HAP Portability In	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total</b>	<b>8,530.00</b>	<b>856.33</b>	<b>658.58</b>	<b>658.58</b>	<b>856.33</b>	<b>(197.75)</b>
<b>Total Expenses (excluding HAP)</b>	<b>637,892.00</b>	<b>53,303.16</b>	<b>49,134.81</b>	<b>49,134.81</b>	<b>53,303.16</b>	<b>(4,168.35)</b>
4715 HAP	5,906,254.00	492,187.83	469,057.00	469,057.00	492,187.83	(23,130.83)
4715 UAP	0.00	0.00	6,991.00	6,991.00	0.00	6,991.00
4718 FSS Escrow	0.00	0.00	5,170.00	5,170.00	0.00	5,170.00
<b>HAP Total</b>	<b>5,906,254.00</b>	<b>492,187.83</b>	<b>481,218.00</b>	<b>481,218.00</b>	<b>492,187.83</b>	<b>(10,969.83)</b>
<b>Total Expenses</b>	<b>6,544,146.00</b>	<b>545,491.00</b>	<b>530,352.81</b>	<b>530,352.81</b>	<b>545,491.00</b>	<b>(15,138.19)</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>546,485.00</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>530,352.81</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Net Income/Loss</b>						<b>16,132.19</b>
					Adm Funds	(927.81)
					HAP Funds	17,060.00

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT  
TO THE BEST OF MY KNOWLEDGE AND BELIEF



Liz Webb, Housing Choice Voucher Mgr



Date

\*Increase in FSS Grant

**J. R. "POLLY" LINEWEAVER (JRL)**  
Statement of Revenues, Expenses, and Changes in Fund Equity  
For the Month of January 2022

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Dwelling Rent	186,590.00	15,549.17	16,632.66	16,632.66	15,549.17	1,083.49
3410 HAP Funding	279,886.00	23,323.83	19,277.00	19,277.00	23,323.83	(4,046.83)
<b>3410 Service Coord Grant-2020</b>	67,105.00	5,592.08	0.00	0.00	5,592.08	(5,592.08)
3690 Other Income-Laundry	4,800.00	400.00	122.19	122.19	400.00	(277.81)
3690 Other Income-Late fees,w/orders	12,000.00	1,000.00	153.60	153.60	1,000.00	(846.40)
<b>Total Receipts</b>	<b>550,381.00</b>	<b>45,865.08</b>	<b>36,185.45</b>	<b>36,185.45</b>	<b>45,865.08</b>	<b>(9,679.63)</b>
<b>Expenses:</b>						
<b>Administration</b>						
4110 Adm Salaries	51,142.00	4,261.83	2,806.44	2,806.44	4,261.83	(1,455.39)
4540 Adm Benefits	15,343.00	1,278.58	977.87	977.87	1,278.58	(300.71)
4130 Legal Fees	0.00	0.00	0.00	0.00	0.00	0.00
4140 Staff Training	0.00	0.00	0.00	0.00	0.00	0.00
4150 Travel	0.00	0.00	0.00	0.00	0.00	0.00
4171 Auditing Fees	1,750.00	145.83	0.00	0.00	145.83	(145.83)
4190 Sundry	10,000.00	833.33	425.70	425.70	833.33	(407.63)
<b>Total Administration</b>	<b>78,235.00</b>	<b>6,519.58</b>	<b>4,210.01</b>	<b>4,210.01</b>	<b>6,519.58</b>	<b>(2,309.57)</b>
<b>Tenant Services:</b>						
<b>4220-40 Service Coord Grant-2019</b>	67,105.00	5,592.08	88.68	88.68	5,592.08	(5,503.40)
4230 Tenant Services-Other	1,000.00	83.33	0.00	0.00	83.33	(83.33)
<b>Total Tenant Serv.</b>	<b>68,105.00</b>	<b>5,675.42</b>	<b>88.68</b>	<b>88.68</b>	<b>5,675.42</b>	<b>(5,586.74)</b>
<b>Utilities:</b>						
4310 Water	8,000.00	666.67	678.51	678.51	666.67	11.84
4320 Electric	65,000.00	5,416.67	7,403.82	7,403.82	5,416.67	1,987.15
4390 Sewer	25,000.00	2,083.33	1,755.22	1,755.22	2,083.33	(328.11)
<b>Total Utilities</b>	<b>98,000.00</b>	<b>8,166.67</b>	<b>9,837.55</b>	<b>9,837.55</b>	<b>8,166.67</b>	<b>1,670.88</b>
<b>Maintenance:</b>						
4410 Maintenance Salaries	39,889.00	3,324.08	2,751.43	2,751.43	3,324.08	(572.65)
4540 Maintenance Benefits	11,967.00	997.25	361.69	361.69	997.25	(635.56)
4420 Materials	12,000.00	1,000.00	565.40	565.40	1,000.00	(434.60)
4430 Contract	43,000.00	3,583.33	5,637.54	5,637.54	3,583.33	2,054.21
<b>Total Maintenance</b>	<b>106,856.00</b>	<b>8,904.67</b>	<b>9,316.06</b>	<b>9,316.06</b>	<b>8,904.67</b>	<b>411.39</b>
<b>General:</b>						
4510 Insurance	11,950.00	995.83	915.56	915.56	995.83	(80.27)
4570 Collection Loss	0.00	0.00	0.00	0.00	0.00	0.00
4580 United Bank/VCC Interest	31,046.00	2,587.17	2,940.81	2,940.81	2,587.17	353.64
<b>Total General</b>	<b>42,996.00</b>	<b>3,583.00</b>	<b>3,856.37</b>	<b>3,856.37</b>	<b>3,583.00</b>	<b>273.37</b>
<b>TOTAL EXPENSES</b>	<b>394,192.00</b>	<b>32,849.33</b>	<b>27,308.67</b>	<b>27,308.67</b>	<b>32,849.33</b>	<b>(5,540.66)</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>36,185.45</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>27,308.67</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>8,876.78</b>

I CERTIFY THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
Lisa Benasher, Lineweaver Manager

 2-8-2022  
Date

**Please note:** A principal payment to United Bank was made in the amount of \$0.00 a total of \$0.00 for this fiscal year and a principal payment to Virginia Community Capital in the amount of \$5,675.13 for a total of \$5,675.13 for this fiscal year.

**FRANKLIN HEIGHTS, LLC**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**For the Month of January 2022**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Dwelling Rent	483,314.00	40,276.17	39,607.00	39,607.00	40,276.17	(669.17)
3410 HAP Funding	1,127,733.00	93,977.75	91,148.00	91,148.00	93,977.75	(2,829.75)
3610 Interest Income	500.00	41.67	40.27	40.27	41.67	(1.40)
3690 Other Income-Late fees, etc.	22,000.00	1,833.33	1,261.74	1,261.74	1,833.33	(571.59)
3410 Other Receipts-CDBG Funds	165,000.00	13,750.00	0.00	0.00	13,750.00	(13,750.00)
Total Receipts	1,798,547.00	149,878.92	132,057.01	132,057.01	149,878.92	(17,821.91)
<b>Expenses:</b>						
<b>Administration</b>						
4110 Adm Salaries	266,851.00	22,237.58	14,133.32	14,133.32	22,237.58	(8,104.26)
4540 Adm Benefits	80,055.00	6,671.25	4,774.67	4,774.67	6,671.25	(1,896.58)
4130 Legal Fees	1,000.00	83.33	0.00	0.00	83.33	(83.33)
4140 Staff Training	1,000.00	83.33	0.00	0.00	83.33	(83.33)
4150 Travel	1,500.00	125.00	0.00	0.00	125.00	(125.00)
4171 Auditing Fees	2,200.00	183.33	0.00	0.00	183.33	(183.33)
4190 Sundry	70,000.00	5,833.33	966.94	966.94	5,833.33	(4,866.39)
4190 CDBG Down Payment Assistance Program	25,000.00	2,083.33	0.00	0.00	2,083.33	(2,083.33)
Total Administration	447,606.00	37,300.50	19,874.93	19,874.93	37,300.50	(17,425.57)
<b>Tenant Services</b>						
4240 Tenant Services-Recreation	1,000.00	83.33	0.00	0.00	83.33	(83.33)
Total Tenant Services	1,000.00	83.33	0.00	0.00	83.33	(83.33)
<b>Utilities</b>						
4310 Water	10,000.00	833.33	(262.92)	(262.92)	833.33	(1,096.25)
4320 Electric	20,000.00	1,666.67	810.89	810.89	1,666.67	(855.78)
4330 Gas	4,000.00	333.33	24.42	24.42	333.33	(308.91)
4390 Sewer	15,000.00	1,250.00	(200.00)	(200.00)	1,250.00	(1,450.00)
Total Utilities	49,000.00	4,083.33	372.39	372.39	4,083.33	(3,710.94)
<b>Maintenance</b>						
4410 Maintenance Salaries	157,505.00	13,125.42	8,247.46	8,247.46	13,125.42	(4,877.96)
4540 Maintenance Benefits	47,252.00	3,937.67	1,951.87	1,951.87	3,937.67	(1,985.80)
4420 Materials	40,000.00	3,333.33	896.36	896.36	3,333.33	(2,436.97)
4430 Contract	150,000.00	12,500.00	468.30	468.30	12,500.00	(12,031.70)
Total Maintenance	394,757.00	32,896.42	11,563.99	11,563.99	32,896.42	(21,332.43)
<b>General</b>						
4510 Insurance	30,000.00	2,500.00	2,242.76	2,242.76	2,500.00	(257.24)
4570 Collection Loss	15,000.00	1,250.00	0.00	0.00	1,250.00	(1,250.00)
4590 Real Estate Taxes	26,000.00	2,166.67	0.00	0.00	2,166.67	(2,166.67)
4580 Interest Expense-HHR	77,850.00	6,487.50	38,925.00	38,925.00	6,487.50	32,437.50
4580 Interest Expense-FH	98,225.00	8,185.42	41,325.00	41,325.00	8,185.42	33,139.58
4580 Interest Expense-FORK(BJ)	35,575.00	2,964.58	3,435.14	3,435.14	2,964.58	470.56
Total General	282,650.00	23,554.17	85,927.90	85,927.90	23,554.17	62,373.73
<b>TOTAL EXPENSES</b>	<b>1,175,013.00</b>	<b>97,917.75</b>	<b>117,739.21</b>	<b>117,739.21</b>	<b>97,917.75</b>	<b>19,821.46</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>132,057.01</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>117,739.21</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Net Income/Loss</b>						<b>14,317.80</b>

I CERTIFY THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
 Nehemias Velez, FH Manager

2/8/22  
 Date

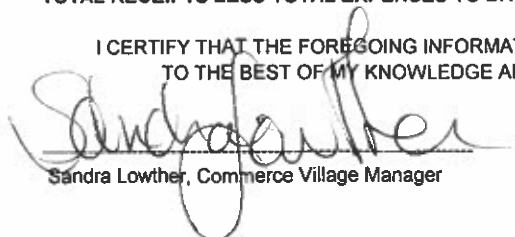
Please note P/I payments below:	Debt Pymts Due	Debt Pymts YTD	Debt Pymts Outstanding	
HHR 2006/14 Go Bond Payment	217,850	38,925	178,925	140000
FH 2009/11/21 Go Bond Payment	443,225	41,325	401,900	443225
Bank of the James	124,177	10,348	113,829	124177
Total	785,252	90,598	694,654	


**COMMERCE VILLAGE LLC (CVO)**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**For the Month of January 2022**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Rental Income	100,000.00	8,333.33	8,049.00	8,049.00	8,333.33	(284.33)
3410 HAP Funding	116,513.00	9,709.42	10,176.00	10,176.00	9,709.42	466.58
3610 Interest (Replacement&Operatir	50.00	4.17	3.33	3.33	4.17	(0.84)
3690 Other Income-Laundry&Donatio	2,000.00	166.67	49.13	49.13	166.67	(117.54)
3690 Other Inc-Late fees,workorders	3,000.00	250.00	36.00	36.00	250.00	(214.00)
<b>Total Receipts</b>	<b>221,563.00</b>	<b>18,463.58</b>	<b>18,313.46</b>	<b>18,313.46</b>	<b>18,463.58</b>	<b>(150.12)</b>
<b>Expenses:</b>						
<b>Administration:</b>						
4110 Adm Salaries	27,460.00	2,288.33	1,405.02	1,405.02	2,288.33	(883.31)
4540 Adm Benefits	7,100.00	591.67	415.67	415.67	591.67	(176.00)
4130 Legal Fees	0.00	0.00	0.00	0.00	0.00	0.00
4140 Staff Training	500.00	41.67	0.00	0.00	41.67	(41.67)
4150 Travel	500.00	41.67	0.00	0.00	41.67	(41.67)
4171 Auditing	0.00	0.00	0.00	0.00	0.00	0.00
4190 Sundry	8,000.00	666.67	477.90	477.90	666.67	(188.77)
4190 Sundry-Management fees	10,000.00	833.33	958.64	958.64	833.33	125.31
4190 Sundry-HCC fees	7,000.00	583.33	0.00	0.00	583.33	(583.33)
<b>Total Administration</b>	<b>60,560.00</b>	<b>5,046.67</b>	<b>3,257.23</b>	<b>3,257.23</b>	<b>5,046.67</b>	<b>(1,789.44)</b>
<b>Tenant Services:</b>						
4240-Case Mgt/Peer Counseling	18,250.00	1,520.83	0.00	0.00	1,520.83	(1,520.83)
4240 Tenant Services-Client	1,500.00	125.00	0.00	0.00	125.00	(125.00)
<b>Total Tenant Serv.</b>	<b>19,750.00</b>	<b>1,645.83</b>	<b>0.00</b>	<b>0.00</b>	<b>1,645.83</b>	<b>(1,645.83)</b>
<b>Utilities:</b>						
4310 Water	4,300.00	358.33	355.41	355.41	358.33	(2.92)
4320 Electricity	20,000.00	1,666.67	1,535.41	1,535.41	1,666.67	(131.26)
4330 Gas	2,100.00	175.00	195.70	195.70	175.00	20.70
4390 Sewer	11,650.00	970.83	849.30	849.30	970.83	(121.53)
<b>Total Utilities</b>	<b>38,050.00</b>	<b>3,170.83</b>	<b>2,935.82</b>	<b>2,935.82</b>	<b>3,170.83</b>	<b>(235.01)</b>
<b>Maintenance:</b>						
4410 Maintenance Salaries	15,450.00	1,287.50	777.33	777.33	1,287.50	(510.17)
4540 Maintenance Benefits	3,500.00	291.67	138.10	138.10	291.67	(153.57)
4420 Materials	2,500.00	208.33	364.20	364.20	208.33	155.87
4430 Contract Costs	18,000.00	1,500.00	403.36	403.36	1,500.00	(1,096.64)
<b>Total Maintenance</b>	<b>39,450.00</b>	<b>3,287.50</b>	<b>1,682.99</b>	<b>1,682.99</b>	<b>3,287.50</b>	<b>(1,604.51)</b>
<b>General Expenses:</b>						
4510 Insurance Expenses	3,500.00	291.67	312.12	312.12	291.67	20.45
4570 Collection Loss	500.00	41.67	0.00	0.00	41.67	(41.67)
4580 Interest Expense	16,380.00	1,365.00	1,365.00	1,365.00	1,365.00	0.00
4590 Real Estate Taxes	24.00	2.00	1.01	1.01	2.00	(0.99)
1162 Replacement Reserve Acct	9,000.00	750.00	750.00	750.00	750.00	0.00
<b>Total General Exp.</b>	<b>29,404.00</b>	<b>2,450.33</b>	<b>2,428.13</b>	<b>2,428.13</b>	<b>2,450.33</b>	<b>(22.20)</b>
<b>TOTAL EXPENSES</b>	<b>187,214.00</b>	<b>15,601.17</b>	<b>10,304.17</b>	<b>10,304.17</b>	<b>15,601.17</b>	<b>(5,297.00)</b>

<b>TOTAL RECEIPTS TO DATE</b>	18,313.46
<b>TOTAL EXPENSES TO DATE</b>	10,304.17
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>	8,009.29

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT  
TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
Sandra Lowther, Commerce Village Manager

  
Date

**AGREEMENT OF ALL DIRECTORS IN LIEU  
OF THE ANNUAL MEETING  
OF THE BOARD OF DIRECTORS OF  
SHENANDOAH HOUSING CORPORATION  
EFFECTIVE JANUARY 19, 2022**

The undersigned, being all of the directors of the corporation, agree that the following corporate actions are taken:

1. The following persons are elected as directors of the corporation; and the corporation, as sole member of Lineweaver Annex Corporation, elects the following persons as directors of Lineweaver Annex Corporation to serve for two years or until such time as their successors are elected and qualify: Michael G. Wong, Dany Fleming, Christine Fasching Maphis, Kevin Coffman, Luciano Benjamin, Gil Colman, Jody Johannessen, and Shonda Green.

2. The following officers are unanimously elected to serve for the ensuing year and until their successors are elected and qualify:

President:	Dany Fleming
Vice President:	Michael G. Wong
Secretary/Treasurer:	Melisa G. Michelsen

3. The President of the corporation is authorized and directed to submit to the Harrisonburg Redevelopment and Housing Authority the report, which is attached to these minutes, which sets forth the activities of the corporation during the previous year and contains a statement indicating how the corporation is furthering its purposes as set forth in the Articles of Incorporation.

All with like effect and validity as though the foregoing actions were duly taken at the regular annual meeting of the directors held after due and proper notice.

DATE: \_\_\_\_\_

\_\_\_\_\_  
Michael G. Wong

DATE: \_\_\_\_\_

\_\_\_\_\_  
Dany Fleming

DATE: \_\_\_\_\_

\_\_\_\_\_  
Christine Fasching Maphis

DATE: \_\_\_\_\_

\_\_\_\_\_  
Jody Johannessen

DATE: \_\_\_\_\_

\_\_\_\_\_  
Kevin Coffman

DATE: \_\_\_\_\_

\_\_\_\_\_  
Luciano Benjamin

DATE: \_\_\_\_\_

\_\_\_\_\_  
Gil Colman

DATE: \_\_\_\_\_

\_\_\_\_\_  
Shonda Green

The foregoing directors were approved by the Harrisonburg Redevelopment and Housing Authority.

DATE: January 19, 2022

\_\_\_\_\_  
Secretary, Harrisonburg Redevelopment  
and Housing Authority



**AGREEMENT OF ALL DIRECTORS IN LIEU  
OF THE ANNUAL MEETING  
OF THE BOARD OF DIRECTORS OF  
LINEWEAVER ANNEX CORPORATION  
EFFECTIVE JANUARY 19, 2022**

The undersigned, being all of the directors of the corporation, agree that the following corporate actions are taken:

1. The following officers are unanimously elected to serve for the ensuing year and until their successors are elected and qualify:

President:	Dany Fleming
Vice President:	Michael G. Wong
Secretary/Treasurer:	Melisa G. Michelsen

2. The President of the corporation is authorized and directed to submit to the Harrisonburg Redevelopment and Housing Authority the report which is attached to these minutes which sets forth the activities of the corporation during the previous year and contains a statement indicating how the corporation is furthering its purposes as set forth in the Articles of Incorporation.

All with like effect and validity as though the foregoing actions were duly taken at the annual meeting of the directors held after due and proper notice.

DATE: _____	_____
	Michael G. Wong

DATE: _____	_____
	Dany Fleming

DATE: _____	_____
	Christine Fasching Maphis

DATE: _____	_____
	Jody Johannessen

DATE: _____	_____
	Kevin Coffman

*DATE:* \_\_\_\_\_

\_\_\_\_\_  
Luciano Benjamin

*DATE:* \_\_\_\_\_

\_\_\_\_\_  
Gil Colman

*DATE:* \_\_\_\_\_

\_\_\_\_\_  
Shonda Green

## **2021 Budget Overruns**

**Resolution # \_\_\_\_\_**

Resolution to approve differences in budgeted expenses versus actual expenses for fiscal year ending 2021.

### **Programs with Budget Overruns**

	Budgeted Expenses	Actual Expenses	Budget Overrun
Local Community Development (includes Lineweaver Annex Apartments and Bridgeport Building)	\$1,054,684	\$1,132,697	(78,013)
Housing Choice Voucher Program	\$6,493,366	\$6,600,769	(\$107,403)
JR "Polly" Lineweaver Apts.	\$477,419	\$511,0638	(\$33,620)
Franklin Heights, LLC	\$1,726,582	\$1,759,862	(\$33,281)
Commerce Village, LLC	\$290,905	\$308,517	(\$17,612)

### **Programs that were within Budgeted Expenses**

No programs this year.

No budgets were done for Shenandoah Housing Corporation; Lineweaver Annex Corporation, and Commerce Village Management, LLC.

HARRISONBURG REDEVELOPMENT & HOUSING AUTHORITY  
UNAUDITED COMBINING STATEMENT OF REVENUES, EXPENSES, AND CHANGES IN FUND EQUITY  
December 31, 2021-End of Year

**INCOME**

LOCAL COMMUNITY DEVELOPMENT/BUSINESS ACTIVITIES	\$804,419.71
HOUSING CHOICE VOUCHER PROGRAM	\$6,195,294.66
JR "POLLY" LINEWEAVER APARTMENTS	\$518,218.30
FRANKLIN HEIGHTS, LLC	\$1,733,041.09
COMMERCE VILLAGE LLC	\$216,095.70
SHENANDOAH HOUSING CORPORATION (SHC)	\$1,713.05
LINEWEAVER ANNEX CORPORATION (LAC)	\$0.00
COMMERCE VILLAGE MANAGEMENT LLC	\$0.00

<b>TOTAL INCOME</b>	<b>\$9,468,782.51</b>
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**EXPENSES**

LOCAL COMMUNITY DEVELOPMENT/BUSINESS ACTIVI	\$1,132,696.64
HOUSING CHOICE VOUCHER PROGRAM	\$6,600,769.18
JR "POLLY" LINEWEAVER APARTMENTS	\$511,038.26
FRANKLIN HEIGHTS, LLC	\$1,759,862.34
COMMERCE VILLAGE LLC	\$308,517.14
SHENANDOAH HOUSING CORPORATION (SHC)	\$2,051.50
LINEWEAVER ANNEX CORPORATION (LAC)	\$2,345.55
COMMERCE VILLAGE MANAGEMENT LLC	\$630.00

<b>TOTAL EXPENSES</b>	<b>\$10,317,910.61</b>
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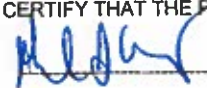
<b>UNRESTRICTED NET ASSETS</b>	<b>-\$849,128.10</b>
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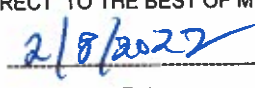
**BREAKDOWN PER PROGRAM**

LOCAL COMMUNITY DEVELOPMENT/BUSINESS ACTIVI	-\$328,276.93
HOUSING CHOICE VOUCHER PROGRAM	-\$405,474.52
JR "POLLY" LINEWEAVER APARTMENTS	\$7,180.04
FRANKLIN HEIGHTS, LLC	-\$26,821.25
COMMERCE VILLAGE LLC	-\$92,421.44
SHENANDOAH HOUSING CORPORATION (SHC)	-\$338.45
LINEWEAVER ANNEX CORPORATION (LAC)	-\$2,345.55
COMMERCE VILLAGE MANAGEMENT LLC	-\$630.00

(849,128.10)

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
Michael G. Wong, Executive Director

  
Date

**LOCAL COMMUNITY DEVELOPMENT (LCD)**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**December 31, 2021-End of Year Report**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3410 HMIS COC Homelessness Grant-19	84,072.00	7,006.00	0.00	71,751.85	84,072.00	(12,320.15)
3410 VHSP-VA Hsg Solutions Prgm Grant	59,391.00	4,949.25	0.00	38,461.72	59,391.00	(20,929.28)
3410 COC Planning Grant Funds	21,161.00	1,763.42	5,765.77	17,452.32	21,161.00	(3,708.68)
3410 VHSP-COVID-19 ESO Grant	23,074.00	1,922.83	0.00	23,074.00	23,074.00	0.00
6110 Gain/Loss Disposition of RE	0.00	0.00	0.00	43,445.51	0.00	43,445.51
3610 Interest Income	0.00	0.00	26.69	180.11	0.00	180.11
3690 Developer's Fees/Other Income	130,000.00	10,833.33	0.00	0.00	130,000.00	(130,000.00)
3690 Application Fees	15,000.00	1,250.00	7,500.00	30,000.00	15,000.00	15,000.00
3690 Lease Income	4,800.00	400.00	0.00	4,000.00	4,800.00	(800.00)
3690 Management Fees-CV	10,000.00	833.33	958.64	11,186.45	10,000.00	1,186.45
3690 BPort Net Receipts	187,590.00	15,632.50	<b>13,843.13</b>	<b>188,125.05</b>	187,590.00	535.05
3690 Lineweaver Apts. Net Receipts	378,740.00	31,561.67	<b>31,687.93</b>	<b>376,742.70</b>	378,740.00	(1,997.30)
Total Receipts	913,828.00	76,152.33	59,782.16	804,419.71	913,828.00	(109,408.29)
<b>Expenses:</b>						
<b>Administration</b>						
4110 Adm Salaries	136,850.00	11,404.17	17,328.36	135,269.05	136,850.00	(1,580.95)
4540 Adm Benefits	41,900.00	3,491.67	3,543.83	31,062.67	41,900.00	(10,837.33)
4130 Legal Expense	5,000.00	416.67	4,021.00	27,452.41	5,000.00	22,452.41
4140 Staff Training	3,000.00	250.00	1,085.00	5,793.99	3,000.00	2,793.99
4150 Travel	5,000.00	416.67	2,461.35	9,263.89	5,000.00	4,263.89
4171 Auditing Fees	4,000.00	333.33	4,000.00	4,000.00	4,000.00	0.00
4190 Sundry-Admin. Exp.	22,400.00	1,866.67	2,425.94	47,832.07	22,400.00	25,432.07
4190 VHSP-COVID-19 ESO Grant	23,074.00	1,922.83	0.00	23,074.00	23,074.00	0.00
4190 VHSP-VA Hsg Solutions Prgm Grant	59,391.00	4,949.25	4,183.61	62,030.68	59,391.00	2,639.68
4190 COC Planning Grant Funds	21,161.00	1,763.42	5,765.77	17,452.32	21,161.00	(3,708.68)
4190 HMIS Match for Grant Funds	10,000.00	833.33	228.56	7,861.46	10,000.00	(2,138.54)
4190 Community Donations (OpDr/COC,etc)	15,000.00	1,250.00	0.00	10,000.00	15,000.00	(5,000.00)
4190 CHERP-CDBG-NCS Grant Expenses	0.00	0.00	(8,340.21)	26,621.03	0.00	26,621.03
4190 HMIS Homeless Assistance-19	84,072.00	7,006.00	0.00	71,847.15	84,072.00	(12,224.85)
4190 HMIS Homeless Assistance-20	0.00	0.00	7,844.81	12,720.34	0.00	12,720.34
Total Administration	430,848.00	35,904.00	44,548.02	492,281.06	430,848.00	61,433.06
<b>Utilities</b>						
4310 Water-CST	0.00	0.00	(46.31)	139.92	0.00	139.92
4320 Electric includes CST	3,200.00	266.67	660.65	2,425.48	3,200.00	(774.52)
4330 Gas includes CST	1,800.00	150.00	253.18	384.08	1,800.00	(1,415.92)
4390 Sewer-CST	0.00	0.00	25.48	650.51	0.00	650.51
Total Utilities	5,000.00	416.67	893.00	3,599.99	5,000.00	(1,400.01)
<b>Maintenance</b>						
4410 Maintenance Salaries	35,575.00	2,964.58	8,794.82	37,820.60	35,575.00	2,245.60
4540 Maintenance Benefits	9,600.00	800.00	891.30	7,849.57	9,600.00	(1,750.43)
4420 Materials	4,000.00	333.33	1,076.31	6,630.37	4,000.00	2,630.37
4430 Contract Costs	6,000.00	500.00	1,962.48	9,699.00	6,000.00	3,699.00
Total Maintenance	55,175.00	4,597.92	12,724.91	61,999.54	55,175.00	6,824.54
<b>General</b>						
4510 Insurance	8,600.00	716.67	623.88	8,718.16	8,600.00	118.16
4570 Collection Loss/Bad Debt Expens	0.00	0.00	0.00	0.00	0.00	0.00
4580 Real Estate Taxes (CST)	6,000.00	500.00	3,631.95	7,103.28	6,000.00	1,103.28
4800 Depreciation Expense	140,870.98	11,739.25	140,870.98	140,870.98	140,870.98	0.00
4000 Bport Expenses	34,600.00	2,883.33	<b>2,197.44</b>	<b>34,544.16</b>	34,600.00	(55.84)
4000 Lineweaver Apartments Expenses	373,590.00	31,132.50	<b>43,799.45</b>	<b>383,579.47</b>	373,590.00	9,989.47
Total General	563,660.98	46,971.75	191,123.70	574,816.05	563,660.98	11,155.07
<b>TOTAL EXPENSES</b>	<b>1,054,683.98</b>	<b>87,890.33</b>	<b>249,289.63</b>	<b>1,132,696.64</b>	<b>1,054,683.98</b>	<b><u>78,012.66</u></b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>804,419.71</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>1,132,696.64</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>(328,276.93)</b>

## December 31, 2021-End of Year Report

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Rental Income	202,000.00	16,833.33	15,371.00	198,149.08	202,000.00	(3,850.92)
3410 HAP Funding	168,440.00	14,036.67	14,575.00	165,446.00	168,440.00	(2,994.00)
3690 Other Income-Laundry	3,800.00	316.67	416.13	3,960.85	3,800.00	160.85
3690 Other Income-Late fees,workordr	4,500.00	375.00	1,325.80	9,186.77	4,500.00	4,686.77
<b>Total Receipts</b>	<b>378,740.00</b>	<b>31,561.67</b>	<b>31,687.93</b>	<b>376,742.70</b>	<b>378,740.00</b>	<b>(1,997.30)</b>
<b>Expenses:</b>						
<b>Administration:</b>						
4110 Adm Salaries	81,300.00	6,775.00	10,522.64	78,910.46	81,300.00	(2,389.54)
4540 Adm Benefits	23,650.00	1,970.83	2,562.69	22,690.53	23,650.00	(959.47)
4130 Legal Fees	1,000.00	83.33	0.00	3,311.50	1,000.00	2,311.50
4140 Staff Training	1,000.00	83.33	0.00	620.00	1,000.00	(380.00)
4150 Travel	1,000.00	83.33	0.00	0.00	1,000.00	(1,000.00)
4171 Auditing	1,200.00	100.00	1,200.00	1,200.00	1,200.00	0.00
4190 Sundry	15,300.00	1,275.00	822.64	19,095.19	15,300.00	3,795.19
<b>Total Administration</b>	<b>124,450.00</b>	<b>10,370.83</b>	<b>15,107.97</b>	<b>125,827.68</b>	<b>124,450.00</b>	<b>1,377.68</b>
<b>Tenant Services:</b>						
4240 Tenant Services-Other	1,000.00	83.33	0.00	13.24	1,000.00	(986.76)
<b>Total Tenant Serv.</b>	<b>1,000.00</b>	<b>83.33</b>	<b>0.00</b>	<b>13.24</b>	<b>1,000.00</b>	<b>(986.76)</b>
<b>Utilities:</b>						
4310 Water	8,300.00	691.67	1,460.94	9,971.21	8,300.00	1,671.21
4320 Electricity	60,000.00	5,000.00	11,420.14	63,864.42	60,000.00	3,864.42
4390 Sewer	23,970.00	1,997.50	3,397.20	23,604.60	23,970.00	(365.40)
<b>Total Utilities</b>	<b>92,270.00</b>	<b>7,689.17</b>	<b>16,278.28</b>	<b>97,440.23</b>	<b>92,270.00</b>	<b>5,170.23</b>
<b>Maintenance:</b>						
4410 Maintenance Salaries	54,350.00	4,529.17	7,654.35	58,106.56	54,350.00	3,756.56
4540 Maintenance Benefits	15,850.00	1,320.83	1,265.25	11,015.66	15,850.00	(4,834.34)
4420 Materials	18,000.00	1,500.00	1,779.64	13,627.10	18,000.00	(4,372.90)
4430 Contract Costs	50,000.00	4,166.67	2,903.22	60,456.75	50,000.00	10,456.75
<b>Total Maintenance</b>	<b>138,200.00</b>	<b>11,516.67</b>	<b>13,602.46</b>	<b>143,206.07</b>	<b>138,200.00</b>	<b>5,006.07</b>
<b>General Expenses:</b>						
4510 Insurance Expenses	7,670.00	639.17	813.97	9,084.04	7,670.00	1,414.04
4570 Collection Loss	10,000.00	833.33	(2,003.23)	8,008.21	10,000.00	(1,991.79)
<b>Total General Exp.</b>	<b>17,670.00</b>	<b>1,472.50</b>	<b>(1,189.26)</b>	<b>17,092.25</b>	<b>17,670.00</b>	<b>(577.75)</b>
<b>TOTAL EXPENSES</b>	<b>373,590.00</b>	<b>31,132.50</b>	<b>43,799.45</b>	<b>383,579.47</b>	<b>373,590.00</b>	<b><u>9,989.47</u></b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>376,742.70</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>383,579.47</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>(6,836.77)</b>

**BRIDGEPORT COMPLEX**  
Statement of Revenues, Expenses, and Changes in Fund Equity  
Attachment B  
December 31, 2021-End of Year Report

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3690 Rental Income	187,590.00	15,632.50	13,843.13	188,125.05	187,590.00	535.05
3690 Other Income	0.00	0.00	0.00	0.00	0.00	0.00
Total Receipts	187,590.00	15,632.50	13,843.13	188,125.05	187,590.00	535.05
<b>Expenses:</b>						
<b>Operations</b>						
4130 Legal Expenses	1,000.00	83.33	0.00	0.00	1,000.00	(1,000.00)
4190-Sundry-Phone	600.00	50.00	84.46	509.67	600.00	(90.33)
Total Op. Expenses	1,600.00	133.33	84.46	509.67	1,600.00	(1,090.33)
<b>Utilities:</b>						
4310 Water	1,200.00	100.00	318.00	636.00	1,200.00	(564.00)
4320 Electricity	0.00	0.00	0.00	0.00	0.00	0.00
4330 Gas	0.00	0.00	0.00	0.00	0.00	0.00
4310 Sewer	0.00	0.00	0.00	0.00	0.00	0.00
Total Utilities	1,200.00	100.00	318.00	636.00	1,200.00	(564.00)
<b>Maintenance:</b>						
4420 Materials	3,000.00	250.00	375.00	1,177.50	3,000.00	(1,822.50)
4430 Contract Costs	12,000.00	1,000.00	(1,037.60)	14,116.49	12,000.00	2,116.49
Total Maintenance	15,000.00	1,250.00	(662.60)	15,293.99	15,000.00	293.99
<b>General Expenses:</b>						
4510 Insurance Expenses	0.00	0.00	0.00	0.00	0.00	0.00
4570 Collection Loss	0.00	0.00	1,089.16	1,089.16	0.00	1,089.16
4580 Interst Expense	16,800.00	1,400.00	1,368.42	17,015.34	16,800.00	215.34
Total General Exp.	16,800.00	1,400.00	2,457.58	18,104.50	16,800.00	1,304.50
<b>TOTAL EXPENSES</b>	<b>34,600.00</b>	<b>2,883.33</b>	<b>2,197.44</b>	<b>34,544.16</b>	<b>34,600.00</b>	<b><u>(55.84)</u></b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>188,125.05</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>34,544.16</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>153,580.89</b>

**Housing Choice Voucher Program (HCV)**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**December 31, 2021-End of Year Report**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts</b>						
3300RC Adm-Fraud/Abuse/Set Off De	7,000.00	583.33	0.00	3,566.27	7,000.00	(3,433.73)
3300RC HAP-Fraud/Abuse/Set Off De	7,000.00	583.33	0.00	3,566.28	7,000.00	(3,433.72)
3300 FSS Fort.	2,000.00	166.67	1,366.10	8,470.18	2,000.00	6,470.18
3300 Portability Fee Income	0.00	0.00	0.00	0.00	0.00	0.00
3610 Interest-HAP	0.00	0.00	0.00	0.00	0.00	0.00
3610 Interest-Adm	0.00	0.00	0.00	0.00	0.00	0.00
3410 MTW Cohort #1-Software Grant	0.00	0.00	0.00	25,000.00	0.00	25,000.00
3410 HCV FSS Grant Funds	35,103.00	2,925.25	2,925.25	35,103.00	35,103.00	0.00
3410 HCV HAP Payment-Adm Fees	531,060.00	44,255.00	34,158.00	608,967.93	531,060.00	77,907.93
3410 HCV HAP Payment-HAP Fees	5,933,400.00	494,450.00	507,434.00	5,510,621.00	5,933,400.00	(422,779.00)
Total Receipts	6,515,563.00	542,963.58	545,883.35	6,195,294.66	6,515,563.00	(320,268.34)
<b>Expenses</b>						
<b>Administration</b>						
4110 Adm Salaries	312,023.00	26,001.92	44,925.05	350,816.21	312,023.00	38,793.21
4110 FSS Salaries (grant portion)	35,103.00	2,925.25	2,925.25	35,103.00	35,103.00	0.00
4540 Adm/FSS Benefits	103,200.00	8,600.00	13,457.60	119,052.90	103,200.00	15,852.90
4130 Legal Fees	5,000.00	416.67	0.00	1,285.50	5,000.00	(3,714.50)
4140 Staff Training	5,000.00	416.67	1,695.00	3,859.99	5,000.00	(1,140.01)
4150 Travel	5,000.00	416.67	371.72	(0.18)	5,000.00	(5,000.18)
4171 Auditing Fees	6,940.00	578.33	6,940.00	6,940.00	6,940.00	0.00
4190 Sundry/Rent & Utility Adj	60,000.00	5,000.00	3,854.43	134,400.57	60,000.00	74,400.57
4190.2 Portability Fees	5,000.00	416.67	(38.50)	1,698.25	5,000.00	(3,301.75)
4190.4 LL Incentives-CARES Act	0.00	0.00	2,000.00	27,750.00	0.00	27,750.00
Total Administration	537,266.00	44,772.17	76,130.55	680,906.24	537,266.00	143,640.24
<b>Utilities</b>						
4310 Water	0.00	0.00	0.00	0.00	0.00	0.00
4320 Electric	4,000.00	333.33	482.51	4,545.27	4,000.00	545.27
4330 Gas	2,000.00	166.67	29.46	2,033.33	2,000.00	33.33
4390 Sewer	0.00	0.00	0.00	0.00	0.00	0.00
Total Utilities	6,000.00	500.00	511.97	6,578.60	6,000.00	578.60
<b>Maintenance</b>						
4420 Maintenance Salaries	0.00	0.00	0.00	0.00	0.00	0.00
4540 Maintenance Benefits	0.00	0.00	0.00	0.00	0.00	0.00
4420 Materials	0.00	0.00	0.00	0.00	0.00	0.00
4430 Contract Costs (Unit Inspections)	0.00	0.00	0.00	0.00	0.00	0.00
Total Maintenance	0.00	0.00	0.00	0.00	0.00	0.00
<b>General</b>						
4510 Insurance	7,700.00	641.67	658.58	7,523.96	7,700.00	(176.04)
4570 Collection Loss	0.00	0.00	(1,818.53)	(1,818.53)	0.00	(1,818.53)
4715 HAP Portability In	0.00	0.00	0.00	0.00	0.00	0.00
Total	7,700.00	641.67	(1,159.95)	5,705.43	7,700.00	(1,994.57)
<b>Total Expenses (excluding HAP)</b>	<b>550,966.00</b>	<b>45,913.83</b>	<b>75,482.57</b>	<b>693,190.27</b>	<b>550,966.00</b>	<b>142,224.27</b>
4715 HAP	5,942,400.00	495,200.00	477,632.00	5,730,302.00	5,942,400.00	(212,098.00)
4715 UAP	0.00	0.00	6,916.00	111,113.00	0.00	111,113.00
4718 FSS Escrow	0.00	0.00	5,404.00	66,163.91	0.00	66,163.91
<b>HAP Total</b>	<b>5,942,400.00</b>	<b>495,200.00</b>	<b>489,952.00</b>	<b>5,907,578.91</b>	<b>5,942,400.00</b>	<b>(34,821.09)</b>
<b>Total Expenses</b>	<b>6,493,366.00</b>	<b>541,113.83</b>	<b>565,434.57</b>	<b>6,600,769.18</b>	<b>6,493,366.00</b>	<b>107,403.18</b>
<b>TOTAL RECEIPTS TO DATE</b>						6,195,294.66
<b>TOTAL EXPENSES TO DATE</b>						6,600,769.18
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Net Income/Loss</b>						(405,474.52)
					Adm Funds	(20,553.07)
					HAP Funds	(384,921.45)



**J. R. "POLLY" LINEWEAVER (JRL)**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**December 31, 2021-End of Year Report**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Dwelling Rent	184,248.00	15,354.00	16,263.57	183,110.76	184,248.00	(1,137.24)
3410 HAP Funding	276,372.00	23,031.00	20,609.00	252,182.00	276,372.00	(24,190.00)
3410 Service Coord Grant-2020	67,105.00	5,592.08	17,074.13	69,302.91	67,105.00	2,197.91
3690 Other Income-Laundry	3,800.00	316.67	416.13	3,966.06	3,800.00	166.06
3690 Other Income-Late fees,w/order:	12,000.00	1,000.00	193.10	9,656.57	12,000.00	(2,343.43)
<b>Total Receipts</b>	<b>543,525.00</b>	<b>45,293.75</b>	<b>54,555.93</b>	<b>518,218.30</b>	<b>543,525.00</b>	<b>(25,306.70)</b>
<b>Expenses:</b>						
<b>Administration</b>						
4110 Adm Salaries	50,955.00	4,246.25	921.73	42,548.53	50,955.00	(8,406.47)
4540 Adm Benefits	17,800.00	1,483.33	1,004.13	14,575.67	17,800.00	(3,224.33)
4130 Legal Fees	0.00	0.00	0.00	895.15	0.00	895.15
4140 Staff Training	0.00	0.00	0.00	0.00	0.00	0.00
4150 Travel	0.00	0.00	0.00	0.00	0.00	0.00
4171 Auditing Fees	1,200.00	100.00	1,200.00	1,200.00	1,200.00	0.00
4190 Sundry	7,500.00	625.00	(823.05)	16,222.20	7,500.00	8,722.20
<b>Total Administration</b>	<b>77,455.00</b>	<b>6,454.58</b>	<b>2,302.81</b>	<b>75,441.55</b>	<b>77,455.00</b>	<b>(2,013.45)</b>
<b>Tenant Services:</b>						
4220-40 Service Coord Grant-2019	67,105.00	5,592.08	16,808.13	69,302.91	67,105.00	2,197.91
4230 Tenant Services-Other	1,000.00	83.33	0.00	13.23	1,000.00	(986.77)
<b>Total Tenant Serv.</b>	<b>68,105.00</b>	<b>5,675.42</b>	<b>16,808.13</b>	<b>69,316.14</b>	<b>68,105.00</b>	<b>1,211.14</b>
<b>Utilities:</b>						
4310 Water	10,000.00	833.33	1,453.02	9,147.79	10,000.00	(852.21)
4320 Electric	65,000.00	5,416.67	14,048.83	67,335.84	65,000.00	2,335.84
4390 Sewer	23,000.00	1,916.67	3,510.44	22,817.86	23,000.00	(182.14)
<b>Total Utilities</b>	<b>98,000.00</b>	<b>8,166.67</b>	<b>19,012.29</b>	<b>99,301.49</b>	<b>98,000.00</b>	<b>1,301.49</b>
<b>Maintenance:</b>						
4410 Maintenance Salaries	40,740.00	3,395.00	3,989.83	41,424.10	40,740.00	684.10
4540 Maintenance Benefits	10,020.00	835.00	857.51	7,400.46	10,020.00	(2,619.54)
4420 Materials	12,000.00	1,000.00	1,796.24	15,603.91	12,000.00	3,603.91
4430 Contract	41,000.00	3,416.67	7,315.90	64,148.01	41,000.00	23,148.01
<b>Total Maintenance</b>	<b>103,760.00</b>	<b>8,646.67</b>	<b>13,959.48</b>	<b>128,576.48</b>	<b>103,760.00</b>	<b>24,816.48</b>
<b>General:</b>						
4510 Insurance	8,500.00	708.33	915.56	10,480.41	8,500.00	1,980.41
4570 Collection Loss	0.00	0.00	5,494.85	5,494.85	0.00	5,494.85
4580 United Bank/VCC Interest	36,575.00	3,047.92	3,162.61	37,403.71	36,575.00	828.71
4800 Depreciation Expense	85,023.63	7,085.30	85,023.63	85,023.63	85,023.63	0.00
<b>Total General</b>	<b>130,098.63</b>	<b>10,841.55</b>	<b>94,596.65</b>	<b>138,402.60</b>	<b>130,098.63</b>	<b>8,303.97</b>
<b>TOTAL EXPENSES</b>	<b>477,418.63</b>	<b>39,784.89</b>	<b>146,679.36</b>	<b>511,038.26</b>	<b>477,418.63</b>	<b>33,619.63</b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>518,218.30</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>511,038.26</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>7,180.04</b>

**FRANKLIN HEIGHTS, LLC**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**December 31, 2021-End of Year Report**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Dwelling Rent	335,000.00	27,916.67	35,951.00	386,047.45	335,000.00	51,047.45
3410 HAP Funding	1,137,066.00	94,755.50	95,301.00	1,174,450.00	1,137,066.00	37,384.00
3610 Interest Income	900.00	75.00	39.96	496.50	900.00	(403.50)
3690 Other Income-Late fees, etc.	20,000.00	1,666.67	2,674.00	16,047.14	20,000.00	(3,952.86)
3410 Other Receipts-CDBG Funds	164,000.00	13,666.67	4,000.00	156,000.00	164,000.00	(8,000.00)
<b>Total Receipts</b>	<b>1,656,966.00</b>	<b>138,080.50</b>	<b>137,965.96</b>	<b>1,733,041.09</b>	<b>1,656,966.00</b>	<b>76,075.09</b>
<b>Expenses:</b>						
<b>Administration</b>						
4110 Adm Salaries	227,580.00	18,965.00	20,218.33	173,220.00	227,580.00	(54,360.00)
4540 Adm Benefits	69,475.00	5,789.58	5,974.07	53,177.83	69,475.00	(16,297.17)
4130 Legal Fees	1,000.00	83.33	655.50	3,242.50	1,000.00	2,242.50
4140 Staff Training	1,000.00	83.33	1,050.00	1,478.00	1,000.00	478.00
4150 Travel	1,500.00	125.00	0.00	0.00	1,500.00	(1,500.00)
4171 Auditing Fees	1,800.00	150.00	1,800.00	1,800.00	1,800.00	0.00
4190 Sundry	35,000.00	2,916.67	1,724.17	73,315.06	35,000.00	38,315.06
4190 CDBG Down Payment Assistance Program	24,000.00	2,000.00	4,000.00	20,000.00	24,000.00	(4,000.00)
<b>Total Administration</b>	<b>361,355.00</b>	<b>30,112.92</b>	<b>35,422.07</b>	<b>326,233.39</b>	<b>361,355.00</b>	<b>(35,121.61)</b>
<b>Tenant Services</b>						
4240 Tenant Services-Recreation	1,000.00	83.33	0.00	1,113.01	1,000.00	113.01
<b>Total Tenant Services</b>	<b>1,000.00</b>	<b>83.33</b>	<b>0.00</b>	<b>1,113.01</b>	<b>1,000.00</b>	<b>113.01</b>
<b>Utilities</b>						
4310 Water	0.00	0.00	114.00	(1,341.34)	0.00	(1,341.34)
4320 Electric	10,000.00	833.33	1,156.01	7,250.69	10,000.00	(2,749.31)
4330 Gas	2,000.00	166.67	51.04	142.84	2,000.00	(1,857.16)
4390 Sewer	0.00	0.00	5,435.72	587.52	0.00	587.52
<b>Total Utilities</b>	<b>12,000.00</b>	<b>1,000.00</b>	<b>6,756.77</b>	<b>6,639.71</b>	<b>12,000.00</b>	<b>(5,360.29)</b>
<b>Maintenance</b>						
4410 Maintenance Salaries	113,386.00	9,448.83	13,932.53	120,553.99	113,386.00	7,167.99
4540 Maintenance Benefits	37,410.00	3,117.50	3,121.83	26,950.49	37,410.00	(10,459.51)
4420 Materials	40,000.00	3,333.33	5,068.16	44,340.63	40,000.00	4,340.63
4430 Contract	75,000.00	6,250.00	(12,617.74)	171,205.82	75,000.00	96,205.82
<b>Total Maintenance</b>	<b>265,796.00</b>	<b>22,149.67</b>	<b>9,504.78</b>	<b>363,050.93</b>	<b>265,796.00</b>	<b>97,254.93</b>
<b>General</b>						
4510 Insurance	25,000.00	2,083.33	2,242.76	25,208.70	25,000.00	208.70
4570 Collection Loss	15,000.00	1,250.00	(2,209.11)	11,995.40	15,000.00	(3,004.60)
4590 Real Estate Taxes	25,000.00	2,083.33	13,138.02	25,426.22	25,000.00	426.22
4580 Interest Expense-HHR	84,600.00	7,050.00	0.00	84,600.00	84,600.00	0.00
4580 Interest Expense-FH	111,625.00	9,302.08	0.00	111,625.00	111,625.00	0.00
4580 Interest Expense-FORK(BJ)	0.00	0.00	(6,456.54)	1,053.51	0.00	1,053.51
4580 Interest Expense-FORK(UB)	25,544.00	2,128.67	0.00	15,563.90	25,544.00	(9,980.10)
4580 Interest Expense-FORK(Seller Fin)	38,991.00	3,249.25	0.00	26,681.97	38,991.00	(12,309.03)
4800 Depreciation Expense	760,670.60	63,389.22	760,670.60	760,670.60	760,670.60	0.00
<b>Total General</b>	<b>1,086,430.60</b>	<b>90,535.88</b>	<b>767,385.73</b>	<b>1,062,825.30</b>	<b>1,086,430.60</b>	<b>(23,605.30)</b>
<b>TOTAL EXPENSES</b>	<b>1,726,581.60</b>	<b>143,881.80</b>	<b>819,069.35</b>	<b>1,759,862.34</b>	<b>1,726,581.60</b>	<b><u>33,280.74</u></b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>1,733,041.09</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>1,759,862.34</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Net Income/Loss</b>						<b>(26,821.25)</b>

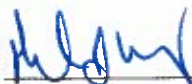
**COMMERCE VILLAGE LLC (CVO)**  
**Statement of Revenues, Expenses, and Changes in Fund Equity**  
**December 31, 2021-End of Year Report**

	Annual Budget	Monthly Budget	Total This Month	Actual To Date	Budget To Date	Over/(Under) To Date
<b>Receipts:</b>						
3110 Rental Income	95,000.00	7,916.67	8,033.00	97,365.00	95,000.00	2,365.00
3410 HAP Funding	109,448.00	9,120.67	10,192.00	115,305.00	109,448.00	5,857.00
3610 Interest (Replacement&Operatin	400.00	33.33	2.96	36.65	400.00	(363.35)
3690 Other Income-Laundry&Donatior	2,000.00	166.67	213.50	1,801.31	2,000.00	(198.69)
3690 Other Inc-Late fees,workorders	3,000.00	250.00	0.00	1,587.74	3,000.00	(1,412.26)
Total Receipts	209,848.00	17,487.33	18,441.46	216,095.70	209,848.00	6,247.70
<b>Expenses:</b>						
<b>Administration:</b>						
4110 Adm Salaries	21,600.00	1,800.00	2,927.16	20,604.86	21,600.00	(995.14)
4540 Adm Benefits	7,500.00	625.00	675.65	6,076.96	7,500.00	(1,423.04)
4130 Legal Fees	0.00	0.00	0.00	0.00	0.00	0.00
4140 Staff Training	500.00	41.67	0.00	500.00	500.00	0.00
4150 Travel	0.00	0.00	0.00	0.00	0.00	0.00
4171 Auditing	0.00	0.00	0.00	0.00	0.00	0.00
4190 Sundry	4,600.00	383.33	600.16	11,750.73	4,600.00	7,150.73
4190 Sundry-Management fees	10,000.00	833.33	958.64	11,186.45	10,000.00	1,186.45
4190 Sundry-HCC fees	6,400.00	533.33	0.00	6,566.97	6,400.00	166.97
Total Administration	50,600.00	4,216.67	5,161.61	56,685.97	50,600.00	6,085.97
<b>Tenant Services:</b>						
4240-Case Mgt/Peer Counseling	20,000.00	1,666.67	5,710.82	23,750.00	20,000.00	3,750.00
4240 Tenant Services-Client	1,500.00	125.00	0.00	605.00	1,500.00	(895.00)
Total Tenant Serv.	21,500.00	1,791.67	5,710.82	24,355.00	21,500.00	2,855.00
<b>Utilities:</b>						
4310 Water	4,300.00	358.33	710.82	4,660.21	4,300.00	360.21
4320 Electricity	20,000.00	1,666.67	3,035.06	18,176.27	20,000.00	(1,823.73)
4330 Gas	2,100.00	175.00	371.39	2,132.24	2,100.00	32.24
4390 Sewer	11,650.00	970.83	1,698.60	11,040.90	11,650.00	(609.10)
Total Utilities	38,050.00	3,170.83	5,815.87	36,009.62	38,050.00	(2,040.38)
<b>Maintenance:</b>						
4410 Maintenance Salaries	15,450.00	1,287.50	1,097.76	13,364.49	15,450.00	(2,085.51)
4540 Maintenance Benefits	3,550.00	295.83	247.83	2,483.01	3,550.00	(1,066.99)
4420 Materials	2,500.00	208.33	275.95	2,682.42	2,500.00	182.42
4430 Contract Costs	15,000.00	1,250.00	(1,911.88)	15,751.98	15,000.00	751.98
Total Maintenance	36,500.00	3,041.67	(290.34)	34,281.90	36,500.00	(2,218.10)
<b>General Expenses:</b>						
4510 Insurance Expenses	2,800.00	233.33	752.07	3,687.31	2,800.00	887.31
4570 Collection Loss	500.00	41.67	(124.00)	2,017.00	500.00	1,517.00
4580 Interest Expense	16,380.00	1,365.00	11,902.39	26,917.39	16,380.00	10,537.39
4590 Real Estate Taxes	24.00	2.00	1.01	12.12	24.00	(11.88)
1162 Replacement Reserve Acct	9,000.00	750.00	750.00	9,000.00	9,000.00	0.00
4800 Depreciation Expense	114,000.16	9,500.01	114,000.16	114,000.16	114,000.16	0.00
4810 Amortization Expense	1,550.67	129.22	1,550.67	1,550.67	1,550.67	0.00
Total General Exp.	144,254.83	12,021.24	128,832.30	157,184.65	144,254.83	12,929.82
<b>TOTAL EXPENSES</b>	<b>290,904.83</b>	<b>24,242.07</b>	<b>145,230.26</b>	<b>308,517.14</b>	<b>290,904.83</b>	<b><u>17,612.31</u></b>
<b>TOTAL RECEIPTS TO DATE</b>						<b>216,095.70</b>
<b>TOTAL EXPENSES TO DATE</b>						<b>308,517.14</b>
<b>TOTAL RECEIPTS LESS TOTAL EXPENSES TO DATE-Income/Loss</b>						<b>(92,421.44)</b>

**HARRISONBURG REDEVELOPMENT & HOUSING AUTHORITY FINANCIAL REPORT**  
**UNAUDITED STATEMENT OF NET POSITION-End of Year Report**  
December 31, 2021-End of Year

	Business Activity LCD	Housing Choice Voucher Program	Section 8 New JRL APTS	Component Units	TOTAL
<b>ASSETS</b>					
<u>Current Assets:</u>					
Cash	452,683.35	218,649.73	0.00	208,744.36	880,077.44
Cash-Security Deposit Funds/FS	32,325.53	93,638.00	16,200.66	139,617.49	281,781.68
Accounts Receivable	634,066.84	0.00	22,268.81	54,819.00	711,154.65
Inventories-Materials	0.00	0.00	0.00	9,161.05	9,161.05
Investments	0.00	0.00	0.00	184,641.94	184,641.94
Escrow Deposits	0.00	0.00	0.00	22,653.76	22,653.76
Prepaid Charges	8,911.28	3,845.26	4,517.05	15,327.75	32,601.34
Total Current Assets:	1,127,987.00	316,132.99	42,986.52	634,965.35	2,122,071.86
<u>Fixed Assets:</u>					
Land, Structures, Equipment or Development Costs	6,515,921.59	60,772.98	3,405,012.90	22,039,112.39	32,020,819.86
Accumulated Depreciation	(3,974,342.18)	(60,772.98)	(2,470,150.49)	(10,172,436.53)	(16,677,702.18)
Total Fixed Assets:	2,541,579.41	0.00	934,862.41	11,866,675.86	15,343,117.68
<u>Other Assets:</u>					
Notes Receivable	75,897.89	0.00	0.00	0.00	75,897.89
Debt Amortization Fund-GAAP	0.00	0.00	0.00	(10,162.17)	(10,162.17)
Deferred Charges	0.00	0.00	0.00	0.00	0.00
Total Other Assets:	75,897.89	0.00	0.00	(10,162.17)	65,735.72
<b>TOTAL ASSETS</b>	<b>3,745,464.30</b>	<b>316,132.99</b>	<b>977,848.93</b>	<b>12,491,479.04</b>	<b>17,530,925.26</b>
<b>LIABILITIES</b>					
<u>Current Liabilities:</u>					
Accounts Payable	42,858.06	101,386.85	280,667.32	567,442.06	992,354.29
Accrued Liabilities	34,791.39	25,009.57	3,307.28	182,012.75	245,120.99
Prepaid Rents/Unearned Revent	0.00	0.00	0.00	5,206.20	5,206.20
Total Current Liabilities:	77,649.45	126,396.42	283,974.60	754,661.01	1,242,681.48
<u>Other Liabilities:</u>					
Fixed Liabilities-Bond Issue	544,327.97	0.00	1,074,846.89	5,020,000.00	6,639,174.86
Deferred Credits	0.00	0.00	0.00	0.00	0.00
Permanent Notes	0.00	0.00	0.00	2,667,123.85	2,667,123.85
Total Other Liabilities:	544,327.97	0.00	1,074,846.89	7,687,123.85	9,306,298.71
<b>TOTAL LIABILITIES</b>	<b>621,977.42</b>	<b>126,396.42</b>	<b>1,358,821.49</b>	<b>8,441,784.86</b>	<b>10,548,980.19</b>
<b>FUND EQUITY</b>					
Invest. in Capital Assets, net of Rel D	0.00	0.00	0.00	0.00	0.00
Unrestricted Net Position (UNP)	3,123,486.88	142,780.55	(380,972.56)	4,049,694.18	6,934,989.05
Restricted Net Position (RNP)	0.00	46,956.02	0.00	0.00	46,956.02
<b>TOTAL FUND EQUITY</b>	<b>3,123,486.88</b>	<b>189,736.57</b>	<b>(380,972.56)</b>	<b>4,049,694.18</b>	<b>6,981,945.07</b>
<b>TOTAL LIABILITIES AND FUND EQUITY</b>	<b>3,745,464.30</b>	<b>316,132.99</b>	<b>977,848.93</b>	<b>12,491,479.04</b>	<b>17,530,925.26</b>

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE AND BELIEF

  
Michael G. Wong, Executive Director

  
Date

HARRISONBURG REDEVELOPMENT & HOUSING AUTHORITY FINANCIAL REPORT  
**UNAUDITED STATEMENT OF NET POSITION**  
**COMPONENT UNITS**  
December 31, 2021-End of Year

	Franklin Heights, LLC	Commerce Village LLC	Shenandoah Housing Corp	Lineweaver Annex Corp	Commerce Village Mgt LLC	TOTAL
<b>ASSETS</b>						
<u>Current Assets:</u>						
Cash	13,514.31	195,230.05	0.00	0.00	0.00	208,744.36
Cash-Security Deposit Funds	123,222.49	16,395.00	0.00	0.00	0.00	139,617.49
Accounts Receivable	54,210.00	609.00	0.00	0.00	0.00	54,819.00
Inventories-Materials	9,161.05	0.00	0.00	0.00	0.00	9,161.05
Investments	0.00	184,549.94	0.00	0.00	92.00	184,641.94
Escrow Deposits	0.00	22,653.76	0.00	0.00	0.00	22,653.76
Prepaid Charges	13,094.86	614.65	809.12	809.12	0.00	15,327.75
Total Current Assets:	213,202.71	420,052.40	809.12	809.12	92.00	634,965.35
<u>Fixed Assets:</u>						
Land, Structures, Equipment or Development Costs	18,057,635.81	3,981,476.58	0.00	0.00	0.00	22,039,112.39
Accumulated Depreciation	(9,457,043.90)	(715,392.63)	0.00	0.00	0.00	(10,172,436.53)
Total Fixed Assets:	8,600,591.91	3,266,083.95	0.00	0.00	0.00	11,866,675.86
<u>Other Assets:</u>						
Notes Receivable	0.00	0.00	0.00	0.00	0.00	0.00
Debt Amortization Fund-GAAP	0.00	(10,162.17)	0.00	0.00	0.00	(10,162.17)
Deferred Charges	0.00	0.00	0.00	0.00	0.00	0.00
Total Other Assets:	0.00	(10,162.17)	0.00	0.00	0.00	(10,162.17)
<b>TOTAL ASSETS</b>	<b>8,813,794.62</b>	<b>3,675,974.18</b>	<b>809.12</b>	<b>809.12</b>	<b>92.00</b>	<b>12,491,479.04</b>
<b>LIABILITIES</b>						
<u>Current Liabilities:</u>						
Accounts Payable	121,758.12	399,412.71	362.45	42,783.78	3,125.00	567,442.06
Accrued Liabilities	111,757.55	70,255.20	0.00	0.00	0.00	182,012.75
Prepaid Rents/Other	4,285.20	921.00	0.00	0.00	0.00	5,206.20
Total Current Liabilities:	237,800.87	470,588.91	362.45	42,783.78	3,125.00	754,661.01
<u>Other Liabilities:</u>						
Fixed Liabilities-Bond Issue	5,020,000.00	0.00	0.00	0.00	0.00	5,020,000.00
Deferred Credits	0.00	0.00	0.00	0.00	0.00	0.00
Permanent Notes	1,517,123.85	1,150,000.00	0.00	0.00	0.00	2,667,123.85
Total Other Liabilities:	6,537,123.85	1,150,000.00	0.00	0.00	0.00	7,687,123.85
<b>TOTAL LIABILITIES</b>	<b>6,774,924.72</b>	<b>1,620,588.91</b>	<b>362.45</b>	<b>42,783.78</b>	<b>3,125.00</b>	<b>8,441,784.86</b>
<b>FUND EQUITY</b>						
Invest. in Capital Assets, net of Rel D Unrestricted Net Position	0.00 2,038,869.90	0.00 2,055,385.27	0.00 446.67	0.00 (41,974.66)	0.00 (3,033.00)	0.00 4,049,694.18
<b>TOTAL FUND EQUITY</b>	<b>2,038,869.90</b>	<b>2,055,385.27</b>	<b>446.67</b>	<b>(41,974.66)</b>	<b>(3,033.00)</b>	<b>4,049,694.18</b>
<b>TOTAL LIABILITIES AND FUND EQUITY</b>	<b>8,813,794.62</b>	<b>3,675,974.18</b>	<b>809.12</b>	<b>809.12</b>	<b>92.00</b>	<b>12,491,479.04</b>

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BY: .....

**New Construction RFP PBVs**

**Closing Date:** February 11, 2022

**Closing Time:** 4:00 p.m. EST

**Title of Proposal:** Project-Based Voucher (PBV)

**Offeror's Company:** Simms Pointe Limited

Partnership (Woda Cooper Development, Inc.)

**Offeror's Authorized Contact Person:** Nick Surak

**Telephone number of Offeror's Contact Person:**

317-522-9232

**Name of Contract Officer:** Michael Wong, Executive  
Director

**ORIGINAL**

**1 of 4**



**WODA COOPER  
COMPANIES**



Harrisonburg Redevelopment &  
Housing Authority



## WODA COOPER COMPANIES

614.396.3200  
www.wodagroup.com  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

February 9, 2022

Harrisonburg Redevelopment and Housing Authority  
286 Kelley Street  
Harrisonburg, VA 22802  
ATTN: Michael G. Wong, Executive Director

RE: Request for Proposals  
Project Based Vouchers  
RFP 01/2021

Dear Mr. Wong,

Simms Pointe Limited Partnership, together with Woda Cooper Companies, Inc., is pleased to submit the attached response to the Harrisonburg Redevelopment & Housing Authority's (HRHA) Request for Proposals for Project Based Vouchers (PBV) for the proposed Simms Pointe affordable rental apartment project in the City of Harrisonburg, Virginia.

Simms Pointe Limited Partnership is requesting fifteen (15) PBVs. Simms Pointe is the proposed new construction of a 80-unit three story elevator served building for families. Simms Pointe is applying for Low Income Housing Tax Credits (LIHTC) in the Virginia Housing ("VH") 2022 competitive round which has a deadline of March 10, 2022. The HRHA PBV program is an important part of this application. Simms Pointe Limited Partnership will include Bay Aging, a Virginia non-profit, as a partner in the project.

Simms Pointe will include 16 one-bedroom, 46 two-bedroom, and 18-three-bedroom units. The requested fifteen (15) PBVs are for 5 one-bedroom, 5 two-bedroom, and 5 three-bedroom units. Simms Pointe is designed to be very affordable with eight (8) units for families earning 30% or less of the area median income, fifteen (15) units for families earning 40% or less of the area median income, seventeen (17) units for families earning 50% or less of the area median income, nine (9) units for families earning 70% or less of the area median income, and thirty-one (31) units for families earning 80% or less of the area median income.

The Simms Pointe project amenities include a community center with kitchenette, common laundry, property management office, and a playground. The project site is 4.7 acres. There is a HDPT bus stop at the front of the Project site. The Simms Pointe location is very good for families and is convenient for good jobs, easy commuting, and close-by services and schools.

The Simms Pointe unit amenities include large units, large windows, all new and modern kitchens and bathrooms, air conditioning, dishwashers, refrigerators, stove/ovens, ample closets & storage spaces and an attractive open design and layout. Cardinal Meadows will be construction to EarthCraft Gold green certification standards. The entire development incorporates highly sealed and insulated building envelopes of the highest modern performance, specialized fresh air transfer systems, green

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building materials, Energy Star appliances, and low water flow fixtures. The tenant utility expenses will be significantly less than those experienced by tenants in conventionally constructed apartments.

Simms Pointe is a great opportunity to expand the opportunities for affordable housing for families in the City of Harrisonburg. We appreciate your consideration of this application for fifteen (15) HRHA PBVs for Simms Pointe.

Please let me know if you have any questions.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Chelsea Arlantino', with a stylized, cursive script.

Chelsea Arlantino  
Vice President and Corporate Counsel  
716-946-3800  
carlantico@wodagroup.com







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## **Tab 1 Application Form**

1. Application Form
2. Application Form Supplemental Information
3. Letters of Support

## Application Form

### I. Project Owner Information

a. Organization Type

- ☐ Community Housing Development Organization  
☐ Nonprofit Housing Developer  
☐ Nonprofit Community Organization  
☒ For Profit Housing Developer  
☐ Other (please specify) \_\_\_\_\_

\*Applicant is Simms Pointe LP but the developer is an affiliated entity, Woda Cooper Development, Inc. whose parent company is Woda Cooper Companies, Inc.

b. Organization Simms Pointe Limited Partnership

c. Organization Address 500 South Front Street, 10th Floor

d. City Columbus State OH Zip Code 43215

e. Executive Director David Cooper, Jr. - Managing Member of LP, President of Woda Cooper

f. Telephone 614-396-3200 Email dcooper@wodagroup.com

g. Project Contract Nick Surak

h. Telephone 317-522-9232 Email nsurak@wodagroup.com

i. Other Principal Party(ies) \_\_\_\_\_

### II. Development Consultant (if applicable)

a. Organization Name Astoria, LLC

b. Consultant Name Ryne Johnson

c. Telephone 804-339-7205 Email rynejohnson@astoriallc.com

### III. General Project Information

a. Name Simms Pointe

b. Address 270 Lucy Drive

c. City Harrisonburg State VA Zip Code 22801

d. Parcel Number 077 A 1 Census Tract 2.05

### IV. Development Experience

Please describe the applicant's experience in the development and management of rental properties, especially those serving low-income families; the number of years of experience; and the number of units managed.

Please see the attached supplemental information in Tab 2.

## V. Detailed Project Description

Please thoroughly describe the proposed project. At a minimum, the following should be addressed:

- a. Description of type of housing to be provided
- b. Need for the project
- c. How the project meets funding priorities and is consistent with the consolidated plan
- d. Characteristics and demographics of the population to be served
- e. Evidence of financing or lender interest
- f. Support services provided
- g. Location and characteristics of the site to include:
  1. Relevant zoning issues
  2. Neighborhood characteristics
  3. Neighborhood amenities
  4. Distance to local amenities, services, health care, and public transportation
- h. Environmental concerns
- i. Disclosure of other government assistance for the proposed project (subsidy layering review)

VI. **Please see the attached supplemental information.**

## Unit Summary

Bedroom Size	1 BR	2 BR	3 BR			Total
Number of Requested PBV Units	5	5	5			15
Number of Other Subsidized Units	11	41	13			65
Number of Market Rate Units	0	0	0			0
Total Units	16	46	18			80

## VII.

## Proposed Contract Rent

Proposed Size	1 BR	2 BR	3 BR	
Proposed Contract Rent Per Month	\$795	\$1,046	\$1,370	

VIII. What is the requested PBV contract term length? 15 years.

- IX. New Construction Description  
Please describe the proposed design, layout, and other construction elements. Include, as appropriate, architectural drawings, floor plans, accessibility features, sustainable material specifications or plans, etc.  
**Please see the attached supplemental information.**
- X. Project Timeline  
Describe in detail the project timeline from inception to initial occupancy.  
**Please see the attached supplemental information.**
- XI. Obstacles  
Describe any known obstacles or issues that may affect the ability to meet any of the project timelines.  
**Please see the attached supplemental information.**



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### Application Form Supplemental Information

#### **V. Detailed Project Description Supplemental Information**

##### a. Description of Type of Housing to be Provided

Simms Pointe Limited Partnership is proposing to develop Simms Pointe in the City of Harrisonburg, Virginia. Simms Pointe will be a multifamily community to be constructed at approximately 270 Lucy Drive. Simms Pointe will be comprised of 80 family apartment units. There will be one-bedroom, two-bedroom, and three-bedroom units in two new-construction three-story elevator buildings. Unit amenities will include air conditioning, dishwashers, garbage disposals, refrigerators, stove/ovens, ample closets & storage spaces and an attractive open design and layout. Furthermore, features and amenities such as appliances, water-heaters, windows, faucets, and shower heads will be such as to permit the property to qualify for an Earthcraft Gold Certification. Simms Pointe will serve low-to-moderate income residents that will be targeted to households at 30% or less AMI to 80% or less of the local area median income and will be affordable housing financed in part by Low Income Housing Tax Credits.

### b. Need For The Project

The City of Harrisonburg (“The City”) has a need for the development of affordable housing, as noted in the Comprehensive Plan. The City created a Comprehensive Plan to “present[] a vision of what kind of community The City would like to be in the future and identifies steps to move toward that vision” (the Plan page 1-1). Part of the Comprehensive Plan addresses specific housing needs, goals, and objectives in the City of Harrisonburg. One goal identified in the Comprehensive Plan is to “meet the current and future needs of residents for affordable housing” (p. 7-17). A 2015 market analysis conducted by the Harrisonburg Redevelopment and Housing Authority noted that area household incomes have increased, but at a much lower rate than inflation.

There is an influx of low- and moderate-income households in The City, accompanied by long wait lists for affordable housing units, as well as low vacancy rates. The Harrisonburg Redevelopment and Housing Authority (“HRHA”) has a waitlist of approximate 1,000 families for its project-based voucher units and 100 families for its Housing Choice Voucher program (Consolidated Plan p. 57). Simms Pointe would assist HRHA by providing units for families on the waitlist. The Comprehensive Plan also includes statistics referencing the low vacancy rates in The City. For rental units, the vacancy rate was 2.4% in 2016 (the Comprehensive Plan p. 7-6). This vacancy rate is lower than in previous years. These issues point to a continuing need for affordable housing.

According to the U.S. Census Bureau, rental rates in The City have steadily increased since 2000 (the Comprehensive Plan p. 7-13). Per the American Community Survey (“ACS”), the median gross rent per month increased from \$480 in 2000 to \$834 in 2016 (the Plan p. 7-13). Further, the median gross rent between 2015-2019 was \$884, which depicts the continuation of rising rental costs (<https://www.census.gov/quickfacts/fact/table/harrisonburgcityvirginia/PST045221>). Additionally, the number of households that paid more than 35% of their monthly income on rent increased from 19% to 45% between 2000 to 2016 (the Comprehensive Plan p. 7-13).

Lastly, the first objective under the City’s Comprehensive Plan’s goal to meet the need for affordable housing is to promote affordable housing options, including rental housing (the Plan p. 7-17). Strategies proposed to meet that objective include encouraging the development of different types of affordable housing, including multi-family units. Simms Pointe addresses that strategy by providing the new construction of a multi-family building and promoting another affordable housing option for individuals and families in The City. This objective was identified as a priority objective in the Comprehensive Plan, with a focus on addressing the objective by 2023. If awarded project-based vouchers and Section 42 tax credits, Simms Pointe Limited Partnership will assist the effort and priority by starting construction of affordable rental housing in 2023.

c. How the Project Meets Funding Priorities and is Consistent With the Consolidated Plan

The current Consolidated Plan for the City of Harrisonburg is for Fiscal Years 2017-2021. According to the Consolidated Plan, the most significant housing issue is cost burden, which is when more than 30% of a household's monthly income is spent on rent or a mortgage. The Consolidated Plan used the Comprehensive Housing Affordability Strategy ("CHAS") to determine that 42.1% of the households in the City of Harrisonburg are cost burdened, and 23.6% of households are severely cost burdened, or spend more than 50% of their income on rent or mortgage (Consolidated Plan p. 2). With that data, the number 1 objective was to "improve access to and quality of housing".

Some housing issues identified in the Consolidated Plan include (1) substandard housing, which lacks plumbing or kitchen facilities, (2) severe overcrowding, and (3) cost burden. Households considered to be cost-burdened represent 82.5% of renters, and 5,809 households have at least one of the above housing issues (Consolidated Plan p. 27). As noted in the Needs Assessment in the Consolidated Plan, households with 0-50% AMI face the largest number of housing issues (Consolidated Plan p. 33). The Needs Assessment also referenced the CHAS in reference to housing for households with incomes 0%-50% AMI. Out of all of the households with incomes in the aforementioned range, there are enough affordable housing units to serve only 34% of those households (Consolidated Plan p. 61). Moreover, the Consolidated Plan's Needs Assessment states that the City of Harrisonburg is committed to allocating funds to housing units for households with 80% or less AMI, and particularly those with 30% or less AMI (Consolidated Plan p. 57). With Simms Pointe's expansive range of income levels served, Simms Pointe assists in addressing the lack of available units for those households.

Overall, affordable housing is the top priority under the Consolidated Plan's Needs Assessment and is considered a high priority. This type of housing is needed for all populations, city-wide. Simms Pointe will provide safe, sanitary, affordable housing to all populations throughout The City and for households with incomes up to 80% AMI, thus proving to be consistent with the goals and priorities of the Consolidated Plan.

In regards to funding priorities, the Consolidated Plan's "Goals Summary" lists "Improve access to and quality of housing" as the top priority (Consolidated Plan p. 107). The proposed funding towards addressing the need for affordable housing is to allocate \$420,000 of its CDBG funds to achieve the goal (Consolidated Plan p. 107). The development of Simms Pointe addresses the funding priority of The City as Simms Pointe Limited Partnership will improve access to quality affordable housing.



d. Characteristics and Demographics of the Population to be Served.

Simms Pointe is a proposed general-occupancy development, meaning that families and individuals of any age can rent a housing unit. As Simms Pointe will have an elevator in each building, senior citizens are able to enjoy the development as they can access the entire building. Further, Simms Pointe will provide housing units for a wide variety of income levels, mostly those being low- and mid-income housing. Specifically, the housing units will be available to households with incomes of 30% or less of the Area Median Income (AMI) to 80% or less AMI.

Additionally, Simms Pointe Limited Partnership will not discriminate against any potential tenant because of race, color, religion, sex, national origin, age, height, weight, disability, arrest record, veteran service, gender identity, sexual orientation, familial status, or marital status. While the needs assessment of the Consolidated Plan notes some groups that face more housing issues than others, all groups are open to apply for Simms Pointe's housing units once constructed. Simms Pointe will also comply with Section 504 of the Rehabilitation Act of 1973 and 24 CFR Part 8 to make units available to persons with mobility and sensory impairments.

e. Evidence of Financing or Lender Interest.

Please see the attached letter included in Tab 5 of this Application.

f. Support Services Provided.

Please see Tab 11 of this Application.

g. Location and Characteristics of the Site.

Simms Pointe is located on a vacant, flat lot in between residential and commercial spaces. Trees line the southern line of the Property. There are townhomes and a senior living facility to the west, townhomes to the south and southeast, medical offices directly to the east, and commercial offices to the north. Therefore, a residential building would not be inconsistent with the surrounding area. Rather, it would provide a transition between the residential and commercial spaces.

Additionally, there is sufficient public transportation to serve the future tenants of Simms Pointe. There is 1 HDPT bus stop located at the front of the Property on Lucy Drive, and 1 HDPT bus stop located at the corner of Lucy Drive and Deyerle Avenue, which is less than 0.01 miles from the Property. With access to various bus lines, tenants will be able to get to their jobs, grocery stores, pharmacies, appointments, retail and commercial centers, and the downtown area. This easy access to the rest of The City gives tenants the ability to

The site of the proposed Simms Pointe is located near numerous transportation points, amenities and job opportunities within 0.01 to 3.0 miles from the site, which include major employers, the fire department, grocery stores, medical offices, pharmacies, restaurants, retail, entertainment, accredited public schools, James Madison University, Sentara RMH Wellness Center, government buildings, and parks. Nearby is the Valley Mall, which includes an extensive amount of retail and commercial stores, such as Target. Furthermore, the site is within close proximity to the local ABC liquor store, multiple banks, a grocery store (Martin's Food), and restaurants and fast food such as Cicis Pizza, Red Lobster, Burger King, Jalisco, and Macado's. The development site is ideal for families due to the close proximity to accredited public schools, vast amenities, job opportunities, and access to major thoroughfares.

h. Environmental Concerns

Simms Pointe Limited Partnership is not aware of any environmental concerns at this time, nor does it anticipate any environmental concerns.

i. Disclosure of Other Government Assistance for the Proposed Project

Simms Pointe Limited Partnership anticipates that the only other assistance it was receive are Section 42 Low-Income Housing Tax Credits allocated by Virginia Housing.



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### IX. New Construction Description

Simms Pointe will be an 80-unit new construction development. The project will consist of 2 three-story elevator buildings that front Lucy Drive. The site will have access from Lucy Drive between the 2 buildings, with a parking lot of at least 120 spaces behind the buildings. The project will include sidewalk construction along Lucy Drive, as well as a bus pull-off lane and bus pad for Harrisonburg Department of Public Transportation.

Simms Pointe will consist of 16 one-bedroom units, 46 two-bedroom units, and 18 three-bedroom units. All units will be affordable and will meet Virginia Housing's universal design standards. At least 10% of units will be accessible. The development will achieve EarthCraft Gold certification for sustainability. This will be wood-frame construction. Exterior of the building will consist of 50% brick and 50% fiber cement panel.

Community amenities will include, at minimum, a community room of at least 749 square feet, and a playground outside for children. Laundry facilities will be provided in the apartment building. A leasing office with a full-time community manager will exist on site, and there will be controlled access into the buildings with an electronic fob. All units will be equipped with free individual WiFi access.



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### XI. Project Timeline

The project timeline to develop, construct, and place in service Simms Pointe is below. With over 30 years of experience in developing affordable housing, Woda Cooper Companies, Inc. has a proven track record of meeting project timeline in fifteen different states, including for all of its properties in the Commonwealth of Virginia.

<b>Milestone</b>	<b>Approximate Date</b>
Submit a Response to HRHA PBV RFP	February 11, 2022
Awarded PBVs from HRHA	February 21, 2022
Apply to Virginia Housing for LIHTC	March 10, 2022
Board of Virginia Housing Approve Final Rankings/Receive an Award of LIHTC	June 22, 2022
Firm Commitment of Construction and Permanent Loan	November, 2022
Site Plan Approval	January 31, 2023
Permits Issued	March 15, 2023
Closing and Transfer of Property to Simms Pointe Limited Partnership	March 30, 2023
Begin Construction	April 1, 2023
Begin Lease-Up	April 1, 2024
End Construction	June 1, 2024
End Lease-Up	September 1, 2024
Credit Placed in Service Date	December 31, 2024





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### **XI. Obstacles Supplement**

Simms Pointe Limited Partnership does not know or, nor does it anticipate, any obstacles or issues that may affect the ability to meet any of the project timeline.



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### **Support Letters**

Various individuals and organizations provided letters and e-mails of support for Simms Pointe to the Planning Commission. Included in this tab are e-mails from residents and organizations such as (1) Brent Jackson, President of Jackson Hotel Management, (2) Randy Harman, CEO of Harman Realty, and (3) Art Stoltzfus with Faith In Action, and letters from (1) the Harrisonburg Rockingham Living Wage Campaign, and (2) The Arc.

## Thanh Dang

---

**From:** Art Stoltzfus <art.stoltzfus@gmail.com>  
**Sent:** Monday, February 7, 2022 3:35 PM  
**To:** Thanh Dang  
**Subject:** Support of Simms Point Development

**WARNING: This email was sent from outside of your organization.**

Dear Thanh,

This email is in support of the proposed Simms Point Development on Lucy Drive, that will be considered at Wednesday's Planning Commission meeting. First, as outlined in the staff memorandum on the project, the proposed units addresses the need for more affordable housing options as stated in the City's Comprehensive Housing Assessment and Market Study. I applaud the City of Harrisonburg's efforts over the past year to implement the recommendations of the Study and am hopeful that there will be additional affordable housing developed in our community to address this critical need.

Secondly, prior to moving to Harrisonburg in 2014, I worked for Key Bank and the National Equity Fund as an underwriter for Low Income Housing Tax Credit deals in the Midwest. I worked with the Woda Cooper Companies on several projects. They are an experienced quality developer and operator of affordable housing. As the long-term owner/operator of Simms Point, Woda Cooper has a self interest in developing quality housing and maintaining stable residency. As with any LIHTC development, Simms Point operations will be reviewed regularly by the tax credit investors and the State of Virginia.

Thank you for your consideration.  
Art Stoltzfus  
Harrisonburg

Sent from [Mail](#) for Windows

## Thanh Dang

---

**From:** Brent C Jackson <brent@jhmgmt.com>  
**Sent:** Wednesday, January 12, 2022 8:46 AM  
**To:** Thanh Dang  
**Cc:** larryrogers1@verizon.net  
**Subject:** Support for Additional Affordable Housing in Harrisonburg, VA to support the hotel industry and business community

**WARNING: This email was sent from outside of your organization.**

Support for Additional Affordable Housing in Harrisonburg, VA to support the hotel industry and business community

Good morning - I hope this email finds you well. I recently had a conversation with former Mayor Larry Rogers in which I stressed to him that I believe the City of Harrisonburg needs additional affordable housing. He suggested that I attend tonight's planning meeting; but since that meeting has now gone virtual, I am sending this email in lieu of in-person attendance. Please let me know if you have any questions.

Jackson Hotel Management is a leading hotel management company in the mid-Atlantic. Jackson Hotel Management currently operates a portfolio of 5 hotels located throughout Virginia and Maryland. We were founded and are headquartered in Harrisonburg, VA and one of our hotels is located in the City of Harrisonburg (Clarion Pointe Harrisonburg at 1440 E Market St). Jackson Hotel Management believes strongly in providing a living wage for our employees and we are proud to have been confirmed as a Gold Level certified employer by the Harrisonburg Rockingham Living Wage Certification program. According to their website, the goal of the Harrisonburg Rockingham Living Wage Certification program is to "promote a living wage throughout Harrisonburg-Rockingham to foster the health, vitality, and livability of our community". Jackson Hotel Management agrees with this goal and we believe that helping all workers achieve a living wage is a common responsibility across the entire hotel industry and amongst the business community of Harrisonburg. The Clarion Pointe Harrisonburg also believes in the goal of promoting a living wage. Currently, the Clarion Pointe Harrisonburg is hiring for all positions with a starting wage of \$13.00 or higher. However, it has become very obvious of late that improving employee wages are not the only factor directly affecting the livelihoods of our hotel team members in Harrisonburg, VA. Very specifically, we have had numerous potential employees attempt to relocate to Harrisonburg to join our team only to be forced to resign the position because they could not find affordable housing in the area or the housing wasn't going to be available for a period of months. Further, despite Clarion Pointe's attempts to grow wages; many/most of the hotel's team members still fall into the low- and moderate-income (LMI) individuals and families categories based on the levels as set each year by the U.S. Department of Housing and Urban Development.

Jackson Hotel Management would support any of the following initiatives or anything similar to spark economic growth, support our hotel industry employees and their families, and allow us to find the best individuals to join our teams to provide an amazing tourism experience to travelers visiting Harrisonburg: New single-family houses and town-homes constructed for affordable home buyers, Affordable rental apartments that are newly constructed or preserved, Homebuyers receiving financial assistance through a homebuyer assistance program, and/or Owner-occupied homes repaired through Rehabilitation Programs.

Brent C Jackson  
President | Jackson Hotel Management  
Text | Call: 540.383.5885  
Comprehensive Hospitality Management  
[www.jacksonhotelmanagement.com](http://www.jacksonhotelmanagement.com)

## Thanh Dang

---

**From:** Nancy Brubaker <nrbrubaker@gmail.com>  
**Sent:** Wednesday, January 12, 2022 1:36 PM  
**To:** Thanh Dang  
**Subject:** Lucy Drive Affordable Housing Project

**WARNING: This email was sent from outside of your organization.**

This is to notify you of my support for the Lucy Drive Affordable Housing Project.

Daniel W. Brubaker  
nr brubaker @ [gmail.com](mailto:nrbrubaker@gmail.com)

**Thanh Dang**

---

**From:** Nancy Brubaker <nrbrubaker@gmail.com>  
**Sent:** Wednesday, January 12, 2022 1:45 PM  
**To:** Thanh Dang  
**Subject:** Lucy Drive Affordable Housing for our citizens:

**WARNING: This email was sent from outside of your organization.**

I, Daniel W. Brubaker, support the Lucy Drive Affordable Housing for our citizens.

Daniel W. Brubaker  
150 West Mosby Road  
Harrisonburg, VA 22801  
540-830-7031

## Thanh Dang

---

**From:** Watts, Bruce <bwatts@wodagroup.com>  
**Sent:** Wednesday, January 12, 2022 7:10 PM  
**To:** Thanh Dang  
**Cc:** Surak, Nick; Zee, Parker  
**Subject:** Fwd: Letter Harman Realty

**WARNING: This email was sent from outside of your organization.**

Dang,

I am not sure if this email was forwarded to you and the Planning Commission for our project. Larry Rogers forwarded email to me....Bruce

---

Bruce A. Watts  
Vice President - Development  
Woda Cooper Companies, Inc.  
Office: 757.650.0361  
Mobile: 757.650.0361  
530 South Main St.  
Norfolk, VA 23523

---

**From:** LARRY ROGERS <larryrogers1@verizon.net>  
**Sent:** Wednesday, January 12, 2022 6:53 PM  
**To:** randy@harmanrealty.com  
**Cc:** Watts, Bruce  
**Subject:** Fwd: Letter

Thanks, Randy for your support.

Larry

-----Original Message-----

**From:** Randy Harman <randy@harmanrealty.com>  
**To:** larryrogers1@verizon.net <larryrogers1@verizon.net>  
**Sent:** Wed, Jan 12, 2022 4:18 pm  
**Subject:** Letter

## Affordable Housing Support

Greetings! I hope you all are and continue to be well in this, yet another, State of Emergency we are now under.

Because of this, we will be unable to gather together tonight for the scheduled planning meeting. Since it will now be a 'virtual' meeting, I am sending this email instead of attending. We at Harman Realty, Inc. have several LLCs under our umbrella that are often affected by the lack of affordable housing in our area – specifically 1881 Hospitality, LLC

(Quality Inn & Suites), 1891 Hospitality, LLC (Sleep Inn & Suites), and Innovation Hospitality (Hyatt Place).

As a family and a corporation, would like to see all of our employees thrive and be comfortable in this or any economy. Because of this, we have, in the past year or so, raised our rates of pay across the board in these industries approximately 60%. It had proven quite difficult to employ long-term, sustainable employees at the old rates that had become 'standard' and in no way provided a living wage. We had hoped this in itself would help bring our employees into a more stable housing situation, and therefore allowing more of them to become long-term employees in the service industry. But, in doing so, we have also quickly discovered that it takes much more than increased wages to accomplish this.

We have recently experienced first-hand the effects of having a lack of affordable housing in our area. We have hired and waited for new employees out of the area to relocate here to begin employment with us, only to have them decline the position offered because they could not find a suitable place to live here. We've watched others go through the stress of having to move to other areas because they simply could not afford to live here any longer.

Harman Realty, Inc. would be in support of most any initiatives having to do with supporting all employees in the hospitality industry and others that seem to still fall into the low-to-moderate income categories such as:

a) Revitalization of older apartment units or new construction of such in the area that would allow rents to be set at more comfortable range for families in the above mentioned income range,

b) Homebuyers programs initiated to allow assistance with purchasing homes of their own, therefore freeing up additional apartment/townhome units for those relocating to our area.

Please let me know if you have any questions at all and I will do my best to elaborate as needed.

Randy L. Harman



**Randy Harman**  
CEO & Principal Broker



**Office** 540.432.6552

**Mobile** 540.246.4300

**Web** [www.HarmanRealty.com](http://www.HarmanRealty.com)





INSPIRING BUSINESSES ~

SUPPORTING WORKERS ~

FIGHTING WAGE THEFT IN THE SHENANDOAH VALLEY

### HARRISONBURG ROCKINGHAM LIVING WAGE CAMPAIGN

January 28, 2022

Ms. Thanh Dang, AIP  
Assistant Director  
Department of Community Development  
City of Harrisonburg  
409 South Main Street  
Harrisonburg, Virginia 22801

Dear Thanh:

Please include this email, as a favorable comment, for the next Planning Commission Meeting, as affordable housing is needed now more than ever. I am writing in support of the Simms Pointe Development. A special land use permit and rezoning of the property from R-3 moderate-density to R-5 heavy density is proposed. **These units would not be student housing. The developer proposes 1 and 3-bedroom units for individuals and families. It is a well-known fact that in many cities and towns where smart rules and regulations about land and building are established, there is more access to safe, affordable housing.**

At the last Planning Commission meeting there was a "glitch" and comments made by email were not addressed. The Chair of that Commission said that he had not received any favorable comments about this project. I have a copy of an email addressed to Thanh Dang, Assistant Director, of the Department of Community Development from Mr. Brent Jackson of Jackson Hotel Management who writes in support for additional affordable housing in Harrisonburg. He said, **"Jackson Hotel Management believes strongly in providing a living wage for our employees and we are proud to have been confirmed as a Gold Level certified employer by the Harrisonburg Rockingham Living Wage Certification program. This non-profit has 66 certified employers that covers 5,089 employees, who are receiving a "living wage". According to their website, the goal of the Harrisonburg Rockingham Living Wage Certification program is to "promote a living wage throughout Harrisonburg-Rockingham to foster the health, vitality, and livability of our community". Jackson Hotel Management agrees with this goal, and we believe that helping all workers achieve a living wage is a common responsibility across the entire hotel industry and amongst the business community of Harrisonburg-Rockingham". Mr. Jackson is currently hiring at \$13 an hour or higher. He has had numerous potential employees attempt to relocate to Harrisonburg but were forced to resign because they could not find affordable housing or housing wasn't available for a period of months. He further states that Jackson Hotel Management would support any initiatives that would spark economic growth, such as new single-family houses and town-homes, affordable rental apartments, new or preserved, or a homebuyer assistance program and/or owner-occupied homes repaired through rehabilitation and weatherization programs.**

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[www.hrlivingwage.org](http://www.hrlivingwage.org)

hburg.rockinghamlwc@gmail.com

Public comments in Support - Page 28



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FIGHTING WAGE THEFT IN THE SHENANDOAH VALLEY

### HARRISONBURG ROCKINGHAM LIVING WAGE CAMPAIGN

High housing costs have prevented many young adults from living on their own. Growing income inequality is another serious drag on household formations. Over the next decade, the fastest-growing household types will be younger families and older empty-nester households with very different housing needs, and the growing share of foreign-born households will also add to the increasing diversity and demand. **(Ramona Sanders made email remarks at the last CPC meeting about providing housing for seniors, LEED certified, solar paneled, accessible one-floor-plan with accessible doors, showers, and garages, near all the amenities of this community).**

By restricting the supply of land available for high-density development, regulatory constraints, and **"Not in My Back Yard", (NIMBY), opposition** may also add to the challenges of more affordable types of housing. If current housing supply trends persist, house prices and rents will continue to rise, further limiting the housing options for many.

Families across the United States are paying too high a price to cover the cost of a home. Rents and homeownership costs are skyrocketing, while wages are not keeping pace. Nearly 17 million U.S. households pay half or more of their income on a place to live and they are considered cost-burdened or among the ALICE Population. That means nearly 1 in 7 families are denied the stability that safe, decent, and affordable housing provides. A safe, decent, and affordable place to live can make a real difference in the life of a family. Decent housing can be a path out of poverty for families in need of a hand-up.

Sincerely,

Ramona Sanders resident/owner at 355 Hartman Drive, Harrisonburg, VA 22802 -540-830-3084  
Steering Committee Members  
Harrisonburg Rockingham Living Wage Campaign

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[www.hrlivingwage.org](http://www.hrlivingwage.org)

hburg.rockinghamlwc@gmail.com

Public comments in Support - Page 26



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FIGHTING WAGE THEFT IN THE SHENANDOAH VALLEY

HARRISONBURG ROCKINGHAM LIVING WAGE CAMPAIGN

January 28, 2022

Ms. Thanh Dang, AIP  
Assistant Director  
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City of Harrisonburg  
409 South Main Street  
Harrisonburg, Virginia 22801

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HARRISONBURG ROCKINGHAM LIVING WAGE CAMPAIGN

Page 2

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Sincerely,

**Janet E. Harvey (resident of 455 Andergren Drive, Harrisonburg, VA)**

**Ramona Sanders**

**Steering Committee Members**

**Harrisonburg Rockingham Living Wage Campaign**

**Thanh Dang**

---

**From:** etb0013@aol.com  
**Sent:** Saturday, January 29, 2022 1:33 PM  
**To:** Thanh Dang  
**Subject:** Fwd: Failure Notice

**WARNING: This email was sent from outside of your organization.**

Dear Ms. Dang:

Please use this email, as my consent to be in favor of the Planning Commission Meeting, as affordable housing is definitely needed now more than ever. This email is in support of the Simms Pointe development. A special land use permit and rezoning of the property from R-3 moderate-density to R-5 heavy density is proposed.

Thank you for your consideration of this email..

**Elaine T. Blakey**  
**1127 Sumter Court**  
**Harrisonburg, VA 22802**



Harrisonburg and Rockingham

**Achieve with us.**

for people with intellectual  
and developmental disabilities

540.437.9214 arc@hrarc.org



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Tina Wood

**Self-Advocate**  
Dick Simon

**Executive Director**  
Heather Denman

**Member of:**

H/R Chamber of  
Commerce

The Arc of Virginia

The Arc of the U.S.

Virginia Network of  
Private Providers

Region 1 Local  
Human Rights  
Committee



January 28, 2022

Ms. Thanh Dang, AIP  
Assistant Director  
Department of Community Development  
City of Harrisonburg  
409 South Main Street  
Harrisonburg, Virginia 22801

Dear Ms. Dang:

Please include this email, as a favorable comment, for the next Planning Commission Meeting, as affordable housing for individuals with disabilities is needed now more than ever. I am writing in support of the Simms Pointe development. A special land use permit and rezoning of the property from R-3 moderate-density to R-5 heavy density is proposed. These units would not be student housing. The developer proposes 1 and 3-bedroom units for individuals and families.

Being part of the community and living as independently as possible are among the most important values and goals shared by people with disabilities, their families, and advocates. A home of one's own – either rented or owned – is the cornerstone of independence for people with disabilities.

However, across the U.S. people with disabilities, including people with intellectual and developmental disabilities (I/DD), face a severe housing crisis. Across the nation, many people with disabilities are experiencing an **affordability** crisis.

For people with disabilities, there are far too many barriers to housing. Without affordable, accessible housing in the community, many are at risk of institutionalization or homelessness.

Sincerely,

Heather Denman  
Executive Director

**Thanh Dang**

---

**From:** Janet E. Harvey <j.elaine.harvey@gmail.com>  
**Sent:** Wednesday, February 2, 2022 2:04 PM  
**To:** Thanh Dang; brentfinnegan@gmail.com  
**Subject:** More information relating to affordable housing problems. Click on video

**WARNING: This email was sent from outside of your organization.**

<https://www.brookings.edu/policy2020/votervital/how-can-government-make-housing-more-affordable/>

Please share.

Sincerely,

Janet Harvey  
540.451.1617







**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 2 Developer Experience**

1. Development Team Organization
2. Development Team Capabilities and Experience
3. Woda Cooper Development, Inc. Resume
4. 2016-2021 Woda Cooper Development, Inc. Projects



## Team Organization

Woda Cooper Companies, Inc. has been in business for over 30 years and is a highly experienced vertically integrated real estate firm with development, construction, management and design divisions all based in Columbus, Ohio. The firm also has corporate offices in Columbus, Ohio, Savannah, Georgia, Shelbyville, Kentucky, Mackinaw City, Michigan, Indianapolis, Indiana, Queenstown, Maryland, and Norfolk, Virginia, and business interests in 16 states. Woda Cooper Companies, Inc. has developed and built over 400 affordable multifamily and senior rental housing projects, owns over 16,000 apartments. The principals of Woda Cooper Companies, Inc. are, Jeffrey J. Woda, a CPA, and, David Cooper, Jr., an attorney. Woda Cooper Companies, Inc.'s business model includes being the managing general partner and retaining ownership in almost all of the company's developments; the company has only sold one multifamily property in the past 30 years. Please see the attached complete list of Woda Cooper Companies, Inc. Portfolio of Development, Construction and Management properties.

Woda Cooper Companies, Inc. employs over 700+ people primarily in the field throughout the property management portfolio, development, in central property management operations, and in major construction contracting management and design. Please see Woda Cooper Companies, Inc. Organization Chart for a full list of individuals.

The principals of Woda Cooper Companies, Inc. **Jeffrey J. Woda** and **David Cooper, Jr.** will have daily involvement in the project. The project will be managed by **Nick Surak**, Senior Vice President and he will serve as the main point of contact throughout the entire project. Mr. Surak will be assisted throughout the project by additional colleagues dedicated to this endeavor including **Chelsea Arlantico**, Vice President and Corporate Counsel, **Gregory Mustric**, Vice President, **Parker Zee**, Assistant Vice President and Data Manager, and **Jenna Geier**, Financial Analyst.

Known primarily as an affordable housing developer, Woda Cooper Companies, Inc. has over 30 years of experience in all facets of real estate development, ranging from the redevelopment of a mixed-use project in Savannah, Georgia that includes market rate housing, replacement public housing, LIHTC units, and commercial and retail uses, to the development of a single-family subdivision in Dublin, Ohio with price points in the \$350,000 to \$450,000 range.

Woda Cooper Companies, Inc. is actively involved in the real estate development and housing industries and is recognized nationally as a leader in the affordable housing industry. Woda Cooper Companies, Inc., or one of its affiliates is a member of the National Association of Home Builders Housing Credit Group, National Housing and Rehabilitation Association, the Affordable Housing Tax Credit Coalition, the Council for Affordable and Rural Housing, the Building Industry Association of Central Ohio, and the Michigan, Ohio, Maryland, South Carolina, Georgia, New York, and North Carolina state affordable housing council. Woda Cooper Companies, Inc. has also been recognized for the following awards and citations:

- ***Ranked #13 – 2018 Affordable Housing Developer by Affordable Housing Finance Magazine, April/May edition.***

- ***Ranked #26 – 2018 Affordable Housing Owner by Affordable Housing Finance Magazine, April/May edition.***
- ***Jeffrey Woda was recipient of the 2016 Housing Pioneer award from the Pennsylvania Housing Finance Agency***
- ***Sustainable Fellwood II and III in Savannah, Georgia awarded 2012 Green Properties of the Year by the Community of Affordable Housing Equity Corporation***
- ***2012 Environmental Innovation in LEED Award granted to Sustainable Fellwood in Savannah, Georgia by Atlanta Business Chronicle***
- ***2011 Award of Excellence in Portfolio Preservation by Ohio Capital Corporation for Housing***
- ***Michigan Governor's 2015 Award for Historic Preservation, for Lloyd House in Menominee, Michigan***
- ***Ranked #13 – 2017 Construction Company, Top of the List, Columbus Monthly***
- ***Ranked #6 – Both 2017 Top Commercial Real Estate Developers and 2016 Top Commercial Real Estate Developers by Columbus Business First***
- ***Ranked #9 – 2015 Top Commercial Real Estate Developers by Columbus Business First***
- ***Ranked #13 - 2017 Top Commercial Construction Company and 2016 Top Commercial Construction Company by Columbus Business First***
- ***Ranked #15 - 2015 Top Commercial Construction Company by Columbus Business First***
- ***Ranked #46 - 2017 Largest Privately Held Company by Columbus Business First***

Woda Cooper Companies, Inc. has completed LEED-certified developments in Indiana, Ohio, Pennsylvania, Georgia, Maryland, and Virginia. Woda currently has projects under construction in Ohio and Pennsylvania that will be Passive House (PHIUS)-certified upon completion. A number of Woda personnel have LEED Professional and Passive House credentials and will be assigned as needed to this particular project.

Woda Cooper Companies, Inc. is an expert in the production of applications and solicitations for responses to state, local and financial institutions for assistance with housing development. Woda Cooper Companies, Inc. annually produces nearly 40 applications for affordable housing and other tax credits in 16 or more states. In conjunction with these applications, Woda Cooper Companies, Inc. also makes separate applications for other state, local and federal housing development “soft” funds. Once an award is received by Woda Cooper Companies, Inc. the firm’s staff meets to secure commitments from lenders, equity investors, and others according to a pre-structured programmed approach, assuring individual projects get the attention and expertise from all development team disciplines to financially close and commence construction. Similarly, Woda Construction, Inc. has in place structured programs for each award and carrying it through cost estimating, contract documentation, and construction completion on time and on budget. Woda Management & Real Estate, LLC has a portfolio of over 400 projects and over 16,000 units in 15 states providing access to real-time historic performance data at all times throughout a project. Whether Woda Management is the direct manager or there is a third-party management firm such as is the desire of the City of Harrisonburg and Harrisonburg Redevelopment & Housing Authority, Woda Management generally maintains oversight and has programming to assure a project is properly marketed, managed and controlled with all necessary oversight and reporting.

### **Complementary Additional Development Team Members**

Woda Cooper Companies, Inc. also has several proposed vertically integrated development team members for the project to work in conjunction with both our external third-party consultants and our team members at Harrisonburg Redevelopment & Housing Authority to assure the best possible partnership including:

<b>Development &amp; Financial Underwriting:</b>	<b>Woda Cooper Development, Inc.</b> 500 South Front Street, 10th Floor Columbus, Ohio 43215 614-396-3200 Main Contact: Bruce Watts and P. Craig Patterson
<b>Legal Counsel &amp; HUD Consultants:</b>	<b>Reno &amp; Cavanaugh PLLC</b> 455 Massachusetts Avenue, NW, Suite 400 Washington, D.C. 20001 202-349-2476 Main Contact: Efrem Levy, Member
<b>Concept Architect:</b>	<b>PCI Design Group, Inc.</b> 500 South Front Street, Suite 975 Columbus, Ohio 43215 614-396-3265 Contact Person: Jo Berning, AIA, Managing Partner
<b>Cost Estimating &amp; General Contractor:</b>	<b>Woda Construction, Inc.</b> 500 South Front Street, 10 <sup>th</sup> Floor Columbus, Ohio 43215 614-396-3200 Contact Person: Jim Cappano, Senior Vice President
<b>Management Consulting:</b>	<b>Woda Management &amp; Real Estate, LLC</b> 500 South Front Street, 10 <sup>th</sup> Floor Columbus, Ohio 43215 614-396-3200 Contact Person: David Cooper, Jr., EVP/General Counsel
<b>Community Based Service Provider:</b>	<b>Bay Aging</b> 390 Virginia Street, Suite B Urbanna, VA 23175 804-338-9772 Contact Person: Kathy Vesley, President & CEO



From its inception, **Reno & Cavanaugh PLLC** has been at the forefront of housing and community development law and policy at a national level. With over 35 years of experience, the firm has worked on nearly every major affordable housing legislative reform since 1977, including the HOPE VI program, the Quality Housing and Work Responsibility Act of 1998 (QHWRA), the Native American Housing and Self Determination Act (NAHSDA), the federal Low-Income Housing Tax Credit (LIHTC) program, the Moving to Work (MTW) program, the Choice Neighborhoods program, the American Recovery and Reinvestment Act, the Housing and Economic Recovery Act of 2008 (HERA) and the Rental Assistance Demonstration (RAD). Reno & Cavanaugh PLLC attorneys have worked on hundreds of transactions involving a variety of Tax- Incentivized Developments utilizing Low-Income Housing Tax Credits, New Markets Tax Credits, Energy Credits, Payments In Lieu of Taxes, Historic Tax Credits, Tax-Exempt Bonds, and Tax-Increment Financing structures.

No stranger to Federally-Assisted Housing and Community Development, Reno & Cavanaugh PLLC negotiates complex finance matters for clients as part of daily work, structuring creative financing solutions to leverage limited funding as far as possible. The firm has worked throughout the country and in U.S. territories with public agencies that are implementing federal housing programs and private for-profit and nonprofit developers who are using federal funds to build or rebuild housing and commercial amenities to strengthen communities.

Reno & Cavanaugh PLLC attorneys are adept at rental housing finance and homeownership finance in rural and urban settings and work with programs administered by the U.S. Department of Housing and Urban Development, the U.S. Department of Agriculture, the Internal Revenue Service, the U.S. Environmental Protection Agency, the Commerce Department, the U.S. Department of Veterans Affairs, and the U.S. Department of Transportation. Our attorneys concentrate on complex, multi-phased, mixed-use real estate transactions involving all types of affordable housing and community development funding sources and types, including, but not limited to Conventional Bank Loans, FHA Financing, Project-Based Vouchers (Section 8), The Community Development Block Grant Program, The HOME Program, The Neighborhood Stabilization Programs (NSPs), The Choice Neighborhoods Initiatives, Rental Assistance Demonstration (RAD), The HOPE VI Program, Public Housing Capital Funds, Public Housing Replacement Housing Factor (RHF) Funds, Moving To Work Funds, The Federal Home Loan Bank's Affordable Housing Program (AHP), State Affordable Housing Trust Funds, and Specialized HUD Development Programs

**Efrem Levy**, Member, attorney and our main contact, focuses on affordable housing development and operation. Efrem is sought after for his finance-structuring ability and has spoken at numerous conferences on development finance and asset management. Efrem has a particular focus on: Low-Income Housing Tax Credit (LIHTC) mixed-finance transactions; all aspects of public housing redevelopment; utilizing project-based vouchers for development purposes; the purchase of buildings that are assisted with Section 8 project-based rental assistance; and New Markets Tax Credit (NMTC) transactions with an overlay of federal assistance.



**PCI Design Group, Inc. (PCI)** is an architecture firm dedicated solely to the design of affordable residential housing. They have completed architectural design and construction drawings for over 400 projects. PCI employs five (5) registered architects and five (5) design and production professionals. **Douglas Weatherby, RA, President and Monica Jo Berning, RA, Managing Director** will lead a team that has designed a range of housing structures from single-family subdivisions, to high rise apartment buildings, to Rural Development rehabilitations and historic rehabilitation projects in multiple states. With knowledge of standard architectural practice and ever evolving technology coupled with careful management of outside consultants, PCI designs sustainable, low maintenance, and energy-efficient communities. In full disclosure, please be advised **PCI is affiliated through common ownership with Woda Cooper Companies, Inc.** This highly beneficial relationship allows Woda Cooper Companies, Inc. to collaborate closely with PCI's design and construction professionals to produce high quality and innovative housing solutions. Please see PCI's full resume and credentials provided herein this proposal.



**Woda Construction, Inc.**, a primary entity under Woda Cooper Companies, Inc. parent organization, is committed to efficiently constructing quality affordable housing. Incorporated in 1990 in Ohio, Woda Construction, Inc. is licensed to do business in Ohio, West Virginia, Kentucky, Michigan, Pennsylvania, Maryland, Georgia, South Carolina, Indiana, Virginia, and several other states. Woda Construction, Inc. has completed new construction projects including multi-family garden apartments, townhouse developments, mid-rise elevator buildings, single story senior units with integrated garages, scattered site single family homes, and single-family subdivisions. Woda Construction, Inc. also has extensive experience in substantial rehabilitation and adaptive re-use projects.

**James Cappano** serves as Senior Vice President for Woda Construction, Inc. Mr. Cappano is responsible for providing leadership, guidance and oversight of day-to-day field activities for his assigned team. Mr. Cappano has been involved in the supply side of numerous tax credit housing projects for nearly 20 years. He began his career in the HVAC, Plumbing, and Building Products field with Famous Supply in the mid-1990's. He started his own building material distribution company in 2005; and merged this company into a lumberyard that he acquired in 2012. Prior to joining WCI, Mr. Cappano served as CEO and President of these companies. Mr. Cappano is an eight-year veteran of the United States Marine Corps.

Woda Construction Inc. has unparalleled expertise in construction management to provide high quality, within budget, and on time delivery for energy efficient housing.

Valhalla Mgmt. & Real Estate, LLC, dba **Woda Management & Real Estate, LLC**, also a primary entity under Woda Cooper Companies, Inc. parent organization, manages over 7,200 affordable housing units throughout Ohio, Georgia, Indiana, Kentucky, Maryland, Michigan, Pennsylvania, South Carolina, Tennessee, Virginia, and West Virginia. Woda Management & Real Estate, LLC, an expert in all areas of property management, leasing, maintenance, and compliance, allows us additional unparalleled resources and consulting for the Richmond Redevelopment and Housing Authority RAD project.

See the resume for additional credentials of other members of Woda Cooper Companies, Inc. and its affiliates from which our development team can draw input from for the project. It is anticipated that additional sub-consultant and project development team members and partners will be brought onboard as needed and may include: civil engineers, capital needs assessment consultants, survey consultants; environmental matters experts; structural engineers; and a landscape architect. We will incorporate and meet RRHA's goal of remaining professional services for the project meeting MBE requirements.



**Kathy Vesley** is the President and CEO of Bay Aging (BA), a nonprofit Area Agency on Aging serving Virginia's Northern Neck and Middle Peninsula. In recent years she led the development of the state and national award winning Eastern Virginia Care Transitions Partnership (EVCTP), a CMS-certified healthcare program. This formal collaborative of Area Agencies on Aging, health systems, Managed Care Organizations (MCOs) and skilled nursing facilities recently expanded to provide services statewide. In addition, she has led Bay Aging toward excellence in other programs recognized for outstanding performance --- senior housing development, rural public transportation, the Veterans-Directed HCBS program and more.

Ms. Vesley was appointed in March 2015 to the Virginia's Housing Advisory Council representing the Northern Neck and Middle Peninsula. In this role she addressed important housing issues facing an aging population in the Commonwealth and contributed to the development of housing policy initiatives aimed at addressing Virginia's critical housing needs.

Ms. Vesley also serves as Chairman of Chesapeake Bay Housing, Inc. (CBH), a nonprofit and Virginia Department of Housing and Community Development-approved Community Housing Development Organization. CBH, formerly Rappahannock Housing Services, Inc., was created in 1993. It is operated exclusively for charitable and educational purposes including, but not limited to, the provision and operation of decent, safe, sanitary, and affordable housing and related supportive services for low income individuals in those counties that comprise the Northern Neck and Middle Peninsula planning districts of the Commonwealth of Virginia, and the surrounding region.

Prior to joining Bay Aging in 1998, Ms. Vesley served for several years as the Deputy Commissioner of the Virginia Department for the Aging and other notable positions. Her



undergraduate degrees are from The College of William and Mary, and she has graduate certification from Gallaudet University.



## WODA COOPER COMPANIES

614.396.3200  
www.wodagroup.com  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

### Team Experience and Capabilities

#### Relevant and Previous Experience Overview

In addition to using conventional financing, Woda Cooper developments have been financed using public housing replacement funds, HOME funds, state trust funds, historic tax credits, Brownfield credits, Federal Home Loan Bank Affordable Housing Program funds, Rural Development 538 and 515 loans, and other available funding sources. Woda Cooper has successfully participated in Rental Assistance Demonstration and HUD's Mark to Market program.

Woda Cooper Companies, Inc. has completed a diverse portfolio of over 400 housing developments that have ranged from very urban (Baltimore, Maryland) to very rural (Munising, Michigan). Please see our portfolio of affordable housing projects. These developments have included new construction mid-rise, garden and single-family units, substantial rehabilitations of existing housing, and historic adaptive re-uses of existing structures. Projects have ranged from 16 units to over 200 units. Each project takes on a life of its own and hence no one solution is easily applied to any one development project. Woda Cooper has developed over 90 projects specifically with housing authorities, non-profit and local government partners. Nearly all of the projects constructed within the past five years incorporate energy efficient building methods and many, if not all, have received a LEED, EarthCraft, Passive House or Enterprise Green Certification.

Woda Cooper Companies, Inc. is an expert in the production of applications and solicitations for responses to state, local and financial institutions for assistance with housing development. Woda Cooper Companies, Inc. annually produces nearly 40 applications for affordable housing and other tax credits in 16 or more states. In conjunction with these applications, Woda Cooper also makes separate applications for other state, local and federal housing development "soft" funds. Once an award is received by Woda Cooper Companies, Inc. the firm's staff meets to secure commitments from lenders, equity investors, and others according to a pre-structured programmed approach, assuring individual projects get the attention and expertise from all development team disciplines to financially close and commence construction. Similarly, Woda Construction, Inc. has in place structured programs for each award and carrying it through cost estimating, contract documentation, and construction completion on time and on budget. Woda Management & Real Estate, LLC has a portfolio of over 400 projects and over 16,000 units in 15 states providing access to real-time historic performance data at all times throughout a project. Whether Woda Management is the direct manager or there is a third-party management firm, Woda Management generally maintains oversight and has programming to assure a project is properly marketed, managed and controlled with all necessary oversight and reporting.

Woda Cooper regularly pursues and succeeds in the development of low income and affordable housing initiatives throughout the state of Virginia – a core market for our organization. Each housing development requires Woda Cooper Companies, Inc. to perform some level of business consultation, financial analysis and mission collaboration with non-profit and/or local government entity.

The most recent large-scale example of this experience is at the *Sustainable Fellwood* development in Savannah, GA which involved a partnership with the Housing Authority of Savannah. In addition, following that success, Woda Cooper Companies, Inc. had been retained as the master developer of *Hillcrest* for the Housing Authority of the City of Wilmington, North Carolina Housing Authority as part of its Choice Neighborhoods initiative. Woda Cooper helped devise a plan that upon its undetermined completion, would replace 256 units of obsolete public housing with over 500 hundred mixed income units with both a homeownership and commercial component. Both of these projects are further profiled herein.

Woda Cooper Companies, Inc. is also well versed in RAD transactions having been selected as developer for RAD initiatives in both Baltimore, Maryland and aforementioned work in Georgia. The RAD project with the HABC involves the RAD conversion of a sixty (60) unit public housing development located in the heart of the central city of Baltimore and is adjacent to Johns Hopkins University. Given its location, and relatively small site footprint, the project presents a challenging but exciting opportunity to transform an obsolete public housing development into a thriving and vibrant affordable housing community. The project epitomizes the successful experience of Woda Cooper Companies, Inc. in working collaboratively with local partners. In Baltimore, those partners include the HABC, the City of Baltimore, the Maryland Department of Housing and Community Development not to mention the several service providers with whom Woda Cooper Companies, Inc. works regularly.

Woda Cooper Companies, Inc. assembled team has direct experience in working on RAD projects across the country, both in urban and rural settings, and understands HUD's requirements and expectations to ensure successful project completion. The team thoroughly understands the programmatic requirements for the Public Housing and the Project Based Voucher programs. As an example, it has experience in working with non-elderly disabled vouchers, VASH vouchers, issuing and/or responding to solicitations regarding project-based vouchers or simply requesting a rent increase on an existing Section 8 contracts, and Section 811 Vouchers. In addition to its familiarity with those core housing programs, Woda Cooper Companies, Inc. has direct Choice Neighborhoods program experience having been selected previously as a Choice Neighborhoods Master Developer. Lastly, the success of Woda Cooper Companies, Inc. in securing low income housing tax credits, as evidenced above, is undeniable. Due to its success, it has developed strong relationships with a number of investors and lenders with whom it works in both Virginia and across the country.

The people who make up Woda Cooper Companies, Inc. strive daily to successfully provide new, safe, and appropriate housing opportunities as a catalyst toward revitalizing communities and this is what makes Woda Cooper Companies, Inc. highly qualified to develop affordable housing with the assistance of Project Based Vouchers from Harrisonburg Redevelopment & Housing Authority.

The following are profiles of projects Woda Cooper Companies, Inc. Each of these projects also involves HUD transactions, tax credits and additional complex multi-layered financing. The Woda Cooper team has successful experience in the design, construction and ownership of mixed-income and mixed-use housing development projects, along with familiarity with requirements applicable to HUD public housing financing/mixed-finance development and public housing operation.

Several of the developments completed have involved non-profit partners as well as offering additional tenant services. Woda Cooper has a strong understanding of the populations that they serve and the need to create the appropriate partnerships in order to fully meet the needs of all the residents. Woda Cooper has found in many of the areas they go into that resources for services are very limited. It is important to rely on the expertise of agencies and organizations in the communities in which we build. Woda Cooper also ensures space is specifically designed for services and programming that benefits both our residents and those of the surrounding communities in which our properties are constructed.

The two principals of Woda, Jeffrey J. Woda and David Cooper, Jr. have extensive knowledge in complex and layered funding structures. Jeffrey Woda is a board member of the National Housing and Rehabilitation Association, a member of the American Institute of Certified Public Accountants. David Cooper is a lawyer, is past Chair of the Housing Credit Group of the National Association of Housing Builders, and was a partner at Squire, Sanders & Dempsey LLP, a leading law firm in tax credit matters. Their combined and complementary knowledge associated with their day to day involvement is probably the strongest strength of Woda Cooper Companies, Inc.

Woda strives to ensure properties are marketed well in advance. Prior to site design, financial packets, etc., Woda always requests market studies, to ensure there is a market, what type of housing is needed, bedroom mix, etc.

**Woda Cooper Companies, Inc. has (at a minimum) completed the following projects which include the following (please refer to the attachment in table format):**

- At least two projects in Virginia using Low Income Housing Tax Credits
  - City View Place – Project #2010-C-73 (Richmond, VA)
  - Liberty Pointe- Project #2013-C-97 (Petersburg, VA)
  - The Banks at Berkley- Project #2014-C-83 (Norfolk, VA)
  - Bailey Court- Project #2014-C-91 (Stanardsville, VA)
  - Brennan Pointe- Project #2014-C-79 (Newport News, VA)
  - Woda Bell Diamond- Project #2015-C-104 (Norfolk, VA)
  - Brennan Pointe II- Project #2016-C-102 (Newport News, VA)
  - Freedman Point- Project #2017-C-129 (Hopewell, VA)
  - Holley Pointe – Project #2019-C-106 (Portsmouth, VA)
  - Lambert Landing/Lambert Landing II – Project #2020-C-84/#2020-TEB-108 (Chester, VA)
- At least one project in any location for the same target population
  - City View Place (Richmond, VA) – Family
  - Mary Harvin Center (Baltimore, MD) - Senior
- At least one RAD or Project-Based Rental Assistance project
  - Sustainable Fellwood (Savannah, GA) and others
- At least one occupied rehabilitation project in any location
  - Woda Bell Diamond (Norfolk, VA) and others
- At least one project that received philanthropic (foundation) support from the locality where the project is located

- Lloyd House (Menominee, MI) and others

Below are examples of projects Woda Cooper has recently completed utilizing a variety of financing sources.



## ***Sustainable Fellwood***

Savannah, Georgia



*Sustainable Fellwood*, in Savannah, GA, is a multi-phased, multi-financed, mixed-income development. The master developer is The Woda Group, Inc. Fellwood was a 1940's outdated public housing development which the City of Savannah demolished and sought to replace based on a phased multi-use development master plan. Woda worked with the Housing Authority of Savannah for 6 years on design, development and construction to create a new environmentally

“sustainable” housing project containing 220 multifamily units, 100 senior units and 12 single family homes sold to first time home buyers. Each rental phase of *Sustainable Fellwood* has public housing, tax credit, and market rate units.

Financing includes HUD replacement loans through the Housing Authority of Savannah, Federal and State Low Income Housing Tax Credits, TCAP loans and Exchange Funds through the Georgia Department of Community Affairs, construction loans from Huntington Bank, permanent debt through West Union Bank, grants from Home Depot, the Kresge Foundation, and Enterprise Community Partners. A retail component is being developed. The total project cost is \$27 million. The residential portion of this project placed in service in 2011.

Sustainable and environmental building practices were a critical element at *Sustainable Fellwood*. The entire *Sustainable Fellwood* Master Planned Community, was one of the first “green” affordable housing, mixed-use developments in the Nation. The project is participating in the LEED for Neighborhood Development program and has obtained Silver certification by the US Green Building Council. The family developments achieved LEED Gold certification and the senior building obtained LEED Platinum certification. The development is one of the few projects nationwide to be registered under the EarthCraft Coastal Communities Program.

The general contractor was Woda Construction, Inc. Woda Management is the property manager.

**Hillcrest (Under Design & Development)**  
Wilmington, North Carolina

In 2013, The Woda Group, Inc. was chosen by the Housing Authority of the City of Wilmington through an RFQ process to be the master developer of *Hillcrest* in Wilmington, North Carolina. This 1940's public housing community along with other parcels within the Dry Pond neighborhood is being redeveloped as a \$55 million new mixed use, mixed income community using multi-layered financing including a HUD Choice Neighborhood Initiative (CNI) Implementation Grant. The housing authority is a CNI planning grantee and will, in partnership with The Woda Group, Inc., be pursuing Implementation grant funding.

The 256 public housing units on the *Hillcrest* site will be replaced with a mix of 530 Low Income Housing Tax Credit and market rate units. About 110 units are being developed in offsite infill locations. The street pattern will be recreated, improving connectivity with the neighborhood and including a community building in a central location next to the organic gardens and playgrounds. There will be commercial and retail components developed along the new main artery.



Financing will combine the CNI HUD funding with several phases of 4% and/or 9% LIHTC applications to the North Carolina Housing Finance Agency with conventional and/or other HUD funding sources. Woda is currently in meetings with the Wilmington Housing Authority, various community representatives and organizations to finalize design and scope of the development as well as the various and phased financing structures.

The Woda assembled development team includes a national leader in New Markets Tax Credit development for distressed neighborhoods, an experienced North Carolina developer providing knowledge of the North Carolina state funding processes, and local architectural, engineering and general contractor firms. Strength of the team composition, ability of work in partnership with the housing authority, and commitment to redeveloping *Hillcrest* was key to selection of The Woda Group, Inc.

Woda Management & Real Estate, LLC will be the property manager once completed.



### **Lloyd House** Menomonee, Michigan

Completed in 2014, Lloyd House is the adaptive reuse of a significant historical asset in downtown Menominee called Fish, Net and Twine Building located at 927 First Street. First opening as Marshall B. Lloyd's "wonder store" in 1926, this building has housed a number of retail, service and light assembly businesses over the years. Centrally located in the highly walkable downtown area, this building and its window-laden elevations yield commanding views of Lake Michigan.

Named in honor of the family that originally designed and built the 4-story building, Lloyd House consists of 44 residential units with 14-one bedroom, 24-two bedroom and 6-three bedroom units and two retail suites. Also included will be 58 indoor parking places utilized by both residential and retail tenants – a true mixed use complex.



The Lloyd House construction plan is extensive and included the addition of amenities such as microwave ranges, dishwashers, central air conditioning, central elevator, community room and energy efficiency "green" features such as low e windows, Energy Star appliances and ample insulation meeting or exceeding current energy code required values. The completed project units are spacious, ranging in size from 670 to 1,360 square feet depending on the number of bedrooms. The property received LEED certification once construction was complete.

The total project cost was over \$11 million. The general contractor is Woda Construction, Inc. and the property manager is Woda Management & Real Estate, Inc.



**Mary Harvin Center**  
Baltimore, Maryland



Mary Harvin Center in Baltimore is a story that is bitter-sweet. The property is the winner of the *2016 Developments of Distinction Award* from Novogradac as the “*LIHTC Property that Best Reflects Market Success in Overcoming Significant Obstacles.*” The project was funded by more than \$12.2 million in low-income housing tax credits (LIHTCs), is a 61-unit, four-story building serving the local senior community. The development also offers senior services to the tenants and the broader community, including counseling and a job training center.

On the evening of April 27, 2015, the building—which was 45 percent complete—caught fire during riots after the death of Freddie Gray. The building, along with much of the surrounding area, was completely destroyed by the fire. Within hours, the development’s financial partners, local community organizations, The Woda Group and Mayor Stephanie Rawlings-Blake quickly rallied behind the development.

The developer quickly charge commanding a new schedule, overcame complex approvals needed to start reconstruction, and negotiated with investors, lenders and the housing finance agency to insure adequate resources remained in place to finish the project. A mere five months after the fire, the project was back at 40 percent completion and opened in spring 2016.

### **Somerset Court** East Baltimore, Maryland

In 2013, The Woda Group, Inc. was chosen by the Housing Authority of Baltimore City through an RFQ process to be co-developer of *Somerset Court Extension* in East Baltimore, Maryland. The Somerset Court project is the complete redesign of the existing Somerset Court Extension project located in East Baltimore. The project was built in the early seventies, and has been operated and managed by the Housing Authority of Baltimore City (HABC). The existing layout of the project includes a total of sixty-three, four, five and six bedroom units spread through twelve buildings.



Through the Rental Assistance Demonstration (RAD) program, The Woda Group, Inc., in partnership with HABC, will significantly redesign and rehabilitate the property. Redesign elements include opening the center courtyard to add green space to the project, closing off various pedestrian ingress/egress ways to improve site security, and the addition of a community space that will allow the residents to hold council meetings and other activities. Unit improvements include updated HVAC systems, improved layouts that will allow front door access from the street, and the addition of accessible units.

Financing for the project includes leveraged debt, 4% LIHTC from the Maryland Department of Housing and Community Development, and Rental Housing Works funding from MD DHCD.



### **Audubon Crossing** City of Dayton, Ohio

Audubon Crossing is a new construction senior housing project located within the City of Dayton. The project is conveniently located on the Dayton Metropolitan Housing Authority's Salem Crossing HOPE VI development, blending in seamlessly with existing mixed housing types including homeownership, rental units and an existing three-story apartment rental community. The project site is the last remaining parcel completing a diverse neighborhood that has been envisioned since 1999.



On a quest for innovative financing solutions to build the project, the developer developed an

untraditional financial structure combining and leveraging 4% LIHTC, a Housing Development Loan (HDL) from the Ohio Housing Finance Agency (OHFA), a Multifamily Lending Program (MLP) loan from OHFA, a Housing Development Assistance Program (HDAP) loan from OHFA, HOME Funds provided by the City of Dayton, and Replacement Housing Factor Funds provided by GPDM.



The project was placed in service. The general contractor is Woda Construction, Inc. and Woda Management and Real Estate, LLC is the property manager.



### **Boury Lofts** Wheeling, West Virginia

A wide variety of tenants, including hospital workers, hockey players and senior citizens, all call the corner of 16th and Main streets in downtown Wheeling home. The landmark Boury Warehouse was adapted to loft apartments utilizing State and Federal Historic Rehabilitation Tax Credits combine with New Market Tax Credits. Once the home of a grocery company, wool and ginseng exporters and coffee roasters, the stylish wood and brick structure now contributes to the Central Business District's rebirth. The developer worked to structure a deal whereby ten (10) of the apartments are reserved for the Wheeling Nailers hockey team by the Regional Economic Development Partnership.

The six-story building has over 86,000 sq. ft. for renters to enjoy in a fully renovated structure that retains its historic character along the Ohio River. Historic elements including interior timbering, window forms and a railroad track into the building. Seventy-three apartments include one and two bedroom/one and two bath apartments with open concept layouts. Amenities including two elevators, a lobby, lounge, mail room, fitness center and coffee lounge.



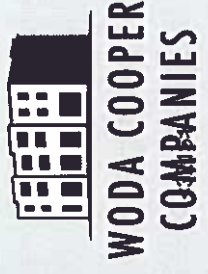
The project was completed in early 2017. The general contractor was Woda Construction, Inc. and the property manager is Woda Management & Real Estate, LLC.





# 2022 Resume

Woda Cooper Companies, Inc.



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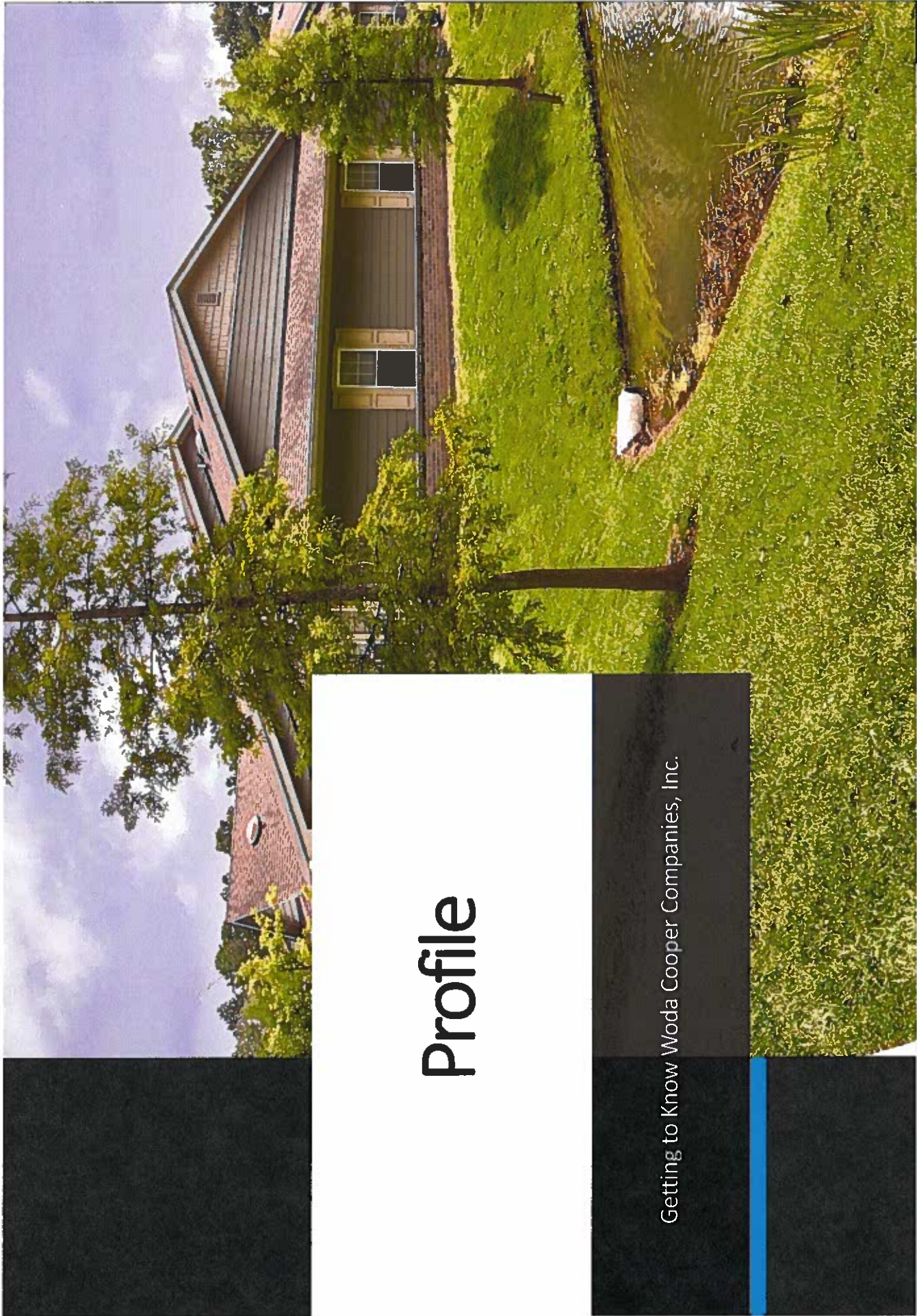
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# Profile

Getting to Know Woda Cooper Companies, Inc.





# Woda Cooper Companies

Development, Construction, Management, and More



- 350+ Friendly Communities
- 16,000+ High Quality Units
- 700+ Caring Employees



- Woda Cooper Companies, Inc. ("WCCI") develops, designs, constructs, and manages affordable housing communities. Our talented team has broad expertise across the spectrum of affordable housing: urban and rural communities; senior and general occupancy communities; mid-rise, garden and single-family communities; and new construction, acquisition rehabilitation, and adaptive reuse developments.
- Since its founding in 1990, WCCI has taken a long-term approach to every community it develops and constructs. The company owns and manages more than 350 communities with over 16,000 units and works hard to affect positive change in every village, town, and city where our housing is located.
- WCCI is 700+ employees strong and consistently ranks among the top affordable housing developers and owners in the country by *Affordable Housing Finance* magazine. The firm operates in 16 states in the Midwest, Mid-Atlantic, and Southeast, and has a development portfolio surpassing \$1.5 billion.

<321\$4



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# WCCI Media

Visit WCCI's YouTube Page for More Videos



- Get to know WCCI—[click here](#) to watch the video!



- See the groundbreaking at Holley Pointe—[click here](#) to watch the video!



- How WCCI designs affordable housing—[click here](#) to watch the video!

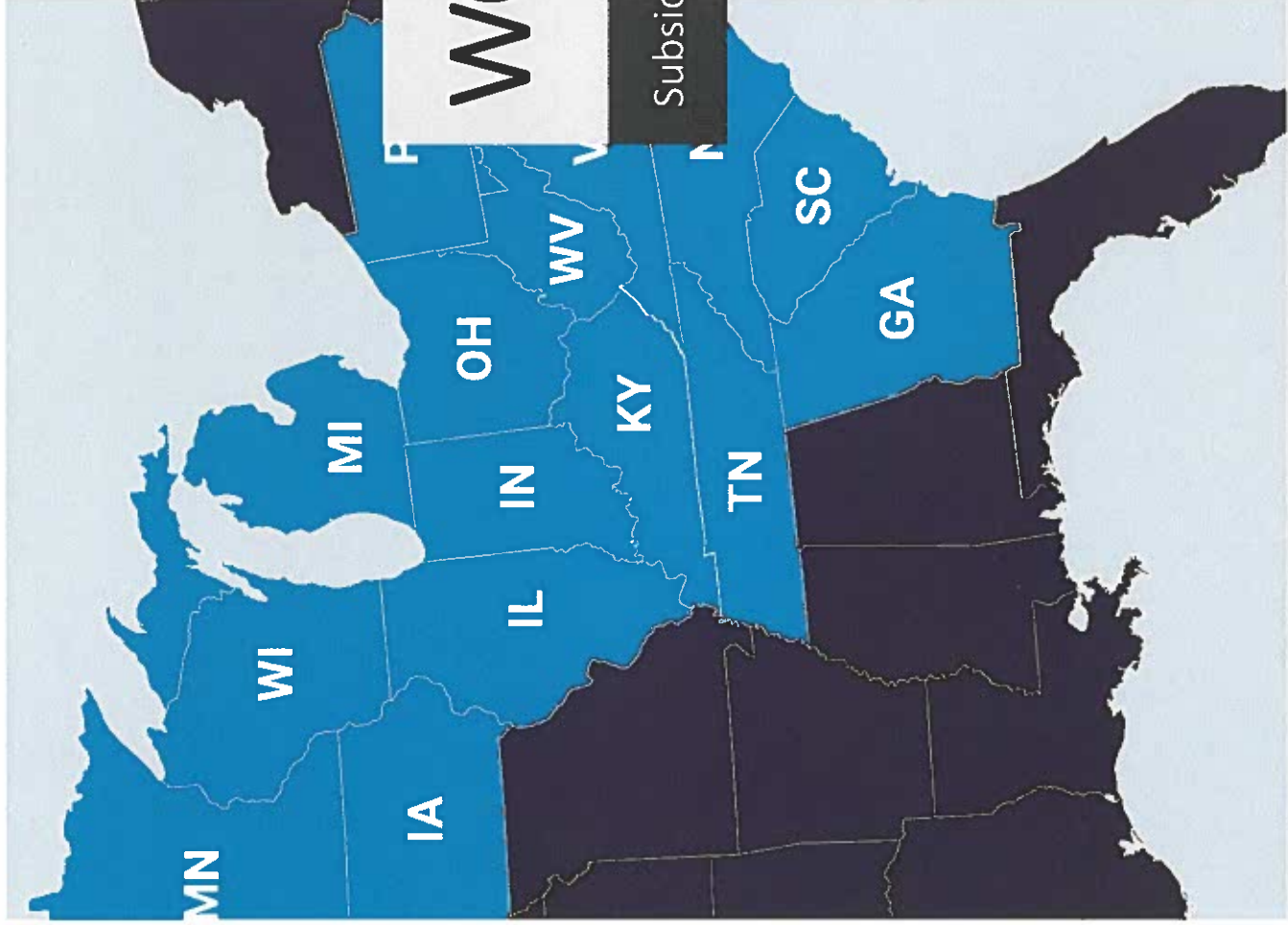


- Food Pantry at The Banks at Berkeley—[click here](#) to watch the video!

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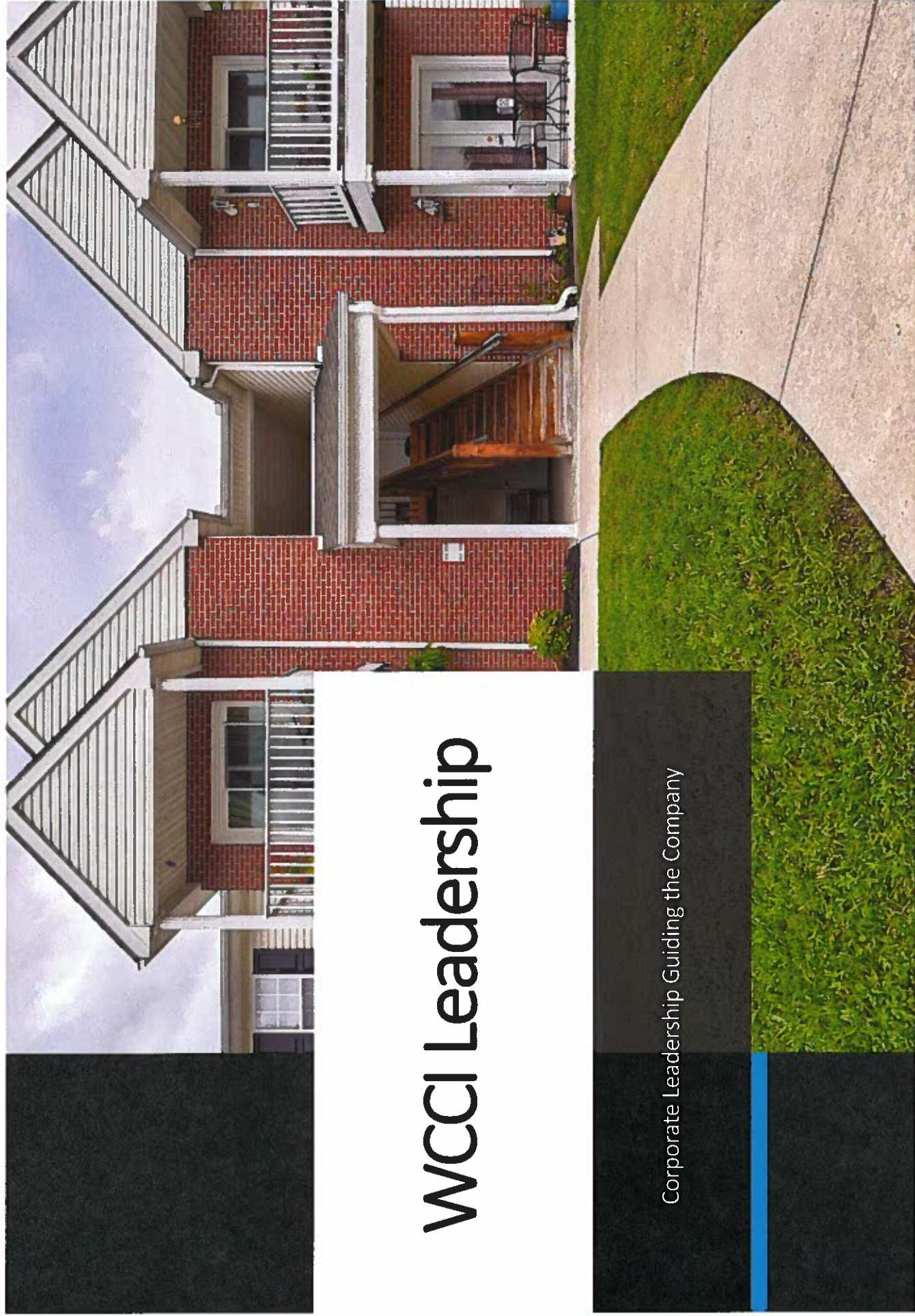


# WCCI Structure

## Subsidiaries and Affiliates

- WCCI is employee owned by an Employee Stock Ownership Plan and Trust. WCCI consists of various subsidiaries and affiliates including Woda Cooper Development, Inc., Woda Construction, Inc., Woda Management & Real Estate, LLC, The Woda Group, Inc., and PCI Design Group.
- WCCI owns and manages communities in the Midwest, Mid-Atlantic, and the Southeast. In addition to our headquarters in Columbus, Ohio, WCCI has offices in Savannah, GA; Shelbyville, KY; Indianapolis, IN; Annapolis, MD; Charlotte, NC; Mackinaw City, MI; and Norfolk, VA.





# WCCI Leadership

Corporate Leadership Guiding the Company

# Jeffrey J. Woda

Director Emeritus



Jeffrey J. Woda serves as Director Emeritus of Woda Cooper Companies, Inc., Woda Construction, Inc., Woda Cooper Development, Inc. and a Managing Director and an Officer of Woda Management & Real Estate, LLC, The Woda Group, Inc., and PCI Design Group, Inc.

Mr. Woda is involved with all aspects of development, construction and property management. He has been involved in the construction and housing industry throughout his career and grew up around his family's construction business.

Mr. Woda currently serves as a board member of the Housing Services Alliance, Inc. and Rehabilitation Association, a steering committee member of the Housing Credit Group of the National Association of Home Builders Association, and a board member of Bethany College and the Main Street Bank of Wheeling. He previously served on the Ohio Housing Trust Fund Advisory Committee, as a board member of the Affordable Housing Tax Credit Coalition, Benchmark Bancorp, Partners in Housing, the Habitat for Humanity of Delaware and Union Counties, and VisionTrust International. He was president of the Council for Rural Housing and Development of Ohio and was a founding board member of the Ohio Housing Council.

Prior to forming WCCI in 1990, Mr. Woda, a CPA, was employed by Ernst and Young. He graduated from Bethany College with a B.A. in Accounting.



# David Cooper, Jr.

Director



David Cooper, Jr. serves as a Managing Director and an Officer of Woda Cooper Companies, Inc., Woda Construction, Inc., Woda Management & Real Estate, LLC, Woda Cooper Development, Inc., The Woda Group, Inc., and PCI Design Group, Inc. He has been involved with the company since its inception.

In conjunction with Jeffrey Woda, Mr. Cooper oversees day-to-day operations of Woda Cooper's business units and is involved with all aspects of each entity's operations.

Mr. Cooper was previously a partner at Squire Sanders LLP, an international law firm, and the Director of Acquisitions and Corporate Counsel for Alliance Holdings, Inc., a privately held investment company. As a practicing attorney, he represented syndicators, lenders, and developers in hundreds of tax credit and other affordable housing transactions. Mr. Cooper is the past chair of the Housing Credit Group of the National Association of Home Builders and has served on the boards of directors of several manufacturing, service, and financial companies, as well as serving as a trustee and officer of numerous community and charitable organizations.

Mr. Cooper received his B.A. from Wittenberg University, and his J.D. from the University of California, Hastings College of the Law.



# Board of Directors

## WCCI Directors

- [David Cooper, Jr.](#)
- [Joseph DiCesare, Chair \(Construction\)](#)
- [Erica Green \(Management\)](#)
- [Lance Paulick \(Construction\)](#)
- [Thomas S. Simons \(Development\)](#)
- [Jeffrey J. Woda, Director Emeritus](#)



# Corporate Personnel

Some of the Key Staff from the Corporate Office

# Key Corporate Personnel

Karen Bernick - Director of Corporate Communications



Karen Bernick serves as Director of Corporate Communications for WCCI. Ms. Bernick is an experienced public relations leader focused on gaining positive exposure for the company's announcements, affordable housing developments, corporate events, and collaborative partnerships.

Ms. Bernick graduated from the University of Illinois and worked for a PR agency in Chicago for several years prior to joining WCCI.

Marc Cohen - Senior Vice President



Marc Cohen leads the development of new relationships and expanding business lines and increase efficiencies from within the management division. Mr. Cohen has closed more than \$500 million in tax-equity syndications generating over \$1.5 billion of real estate development over the last 15 years.

Prior to his time at WCCI, Mr. Cohen held positions at Fallbrook Financial Services Company and CohnReznick. His affiliations include the Institute for Professional and Executive Development, Historic Tax Credit Coalition, Urban Land Institute, and the Council of Development Finance Agencies. Marc holds a Bachelor of Science in Accounting from the University of Delaware.



# Key Corporate Personnel

Christopher LaGrand, Esq - Senior Vice President of Development / Corporate Counsel



Christopher LaGrand, Esq., serves as Senior Vice President and Corporate Counsel. He is responsible for supporting development activity with a focus on legal, policy, and process issues.

Prior to his work with WCCI, Mr. LaGrand served as the Chief Housing Investment Officer of the Michigan State Housing Development Authority. During his tenure, Mr. LaGrand supervised the underwriting of over \$750 million of multifamily investment in the State of Michigan. Mr. LaGrand received a B.A. in Economics from Calvin College and J.D. from the University of Michigan.

Emily Morris, SHRM-SCP, SPHR - Human Resources Director



Emily Morris is the Human Resources Director for WCCI. Ms. Morris oversees a driven HR team that plans and coordinates the company's talents, employee acquisition, oversees the recruitment process, and ensures EEO compliance. Her primary focus is benefits and employee relations.

Ms. Morris has a B.S. in Business Management with a major in Marketing from Franklin University.

# Key Corporate Personnel

Troy Rambo, CPA – Chief Financial Officer



Troy Rambo, CPA serves as the Chief Financial Officer of Woda Cooper Companies, Inc. Joining WCCI in 2022, Mr. Rambo is responsible for managing the financial infrastructure of WCCI and its affiliates. He is a Certified Public Accountant.

Prior to his time at WCCI, Mr. Rambo held the positions of Chief Financial Officer, Vice President, Treasurer and Corporate Controller, and Assistant Treasurer for The Wallick Companies and worked as an Audit Manager for Ernst & Young LLP. He received a B.A. in Accounting from Capital University.

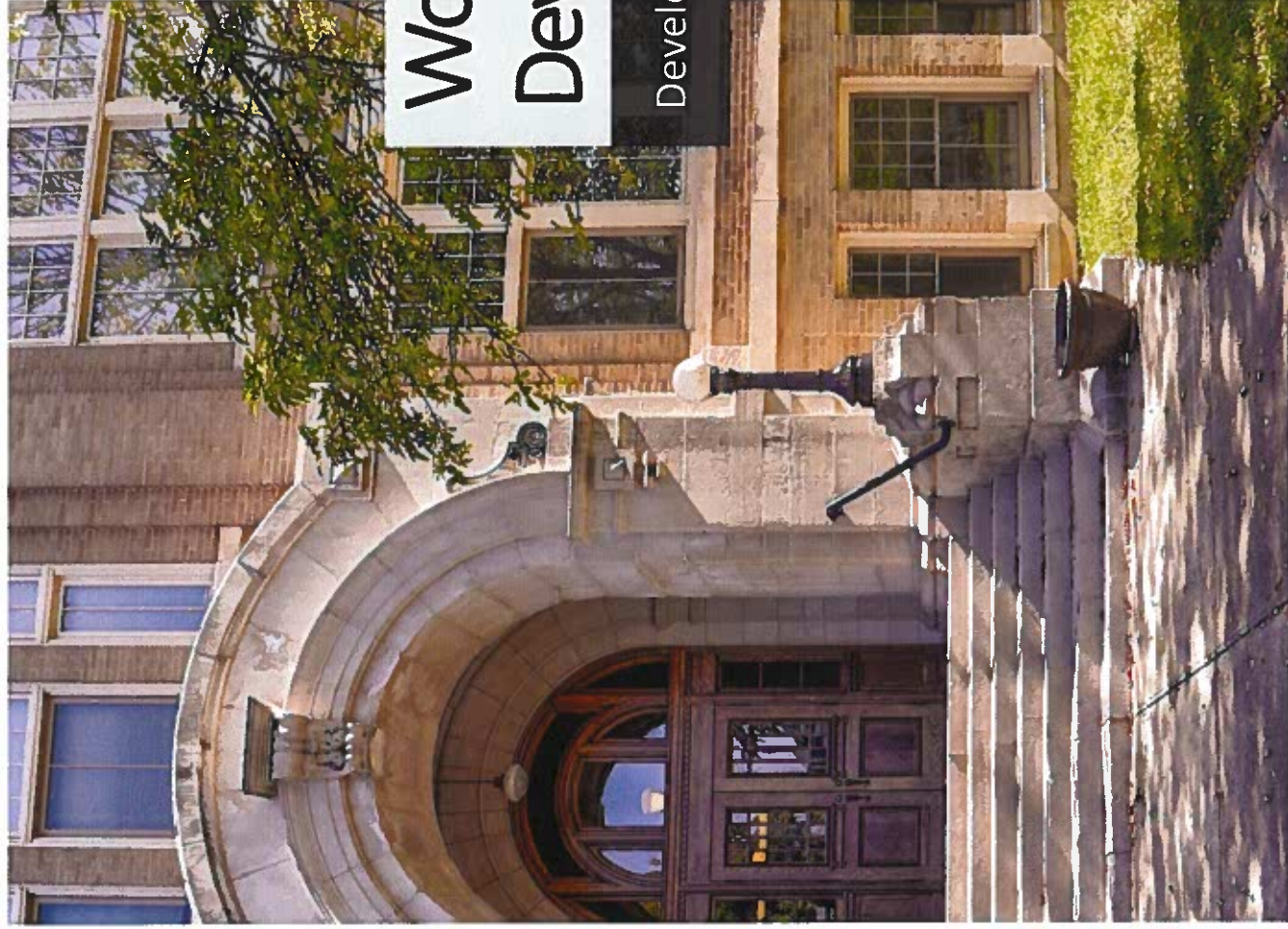
James E. Zambori, CPA - Director of Financial Reporting / Chief Executive Officer



James E. Zambori, CPA serves as the Director of Financial Reporting for Woda Cooper Development, Inc., and the Chief Executive Officer of Woda Cooper Companies, Inc. Mr. Zambori has over 30 years of accounting experience. Prior to joining WCCI in 1997, he specialized in project accounting and was employed as a senior accountant by a publicly traded and SEC regulated consulting firm in Washington, DC.

Mr. Zambori received a B.S. in Accounting from West Liberty State College in 1987 and his Certified Public Accountant Certification in 1992. He also earned his STAR and Credit Professional level 3 (CP3) designations and is a Housing Credit Certified Professional (HCCP).





# Woda Cooper Development, Inc.

Development at WCCI

Woda Cooper Development, Inc. is a member of the National Association of Home Builders Housing Credit Group, National Housing and Rehabilitation Association, the Affordable Housing Tax Credit Coalition, the Council for Affordable and Rural Housing, the Building Industry Association of Central Ohio, and the Michigan, Ohio, Maryland, South Carolina, Georgia, and North Carolina state affordable housing councils.

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WODA COOPER COMPANIES

# WC Development Media

Visit WCCI's YouTube Page for More Videos



- A city manager's view of WCCI 's developments—[click here](#) to watch the video!



- See how one resident utilizes a mixed-use WCCI community—[click here](#) to watch the video!



# WC Development

## Financials

WC Development works with various state housing finance agencies (SHFAs) to develop comprehensive housing development plans that address local and state housing priorities through the awarding of Low-Income Housing Tax Credits (LIHTC) via state Qualified Allocation Plans (QAP). We also seek opportunities to leverage tax credits with other federal, state, and local funding resources for gap financing.

## Investors

- Alliant Capital
- Bank of America
- CREA, LLC
- Community Affordable Housing Equity Corp. ("CAHEC")
- Federation of Appalachian Housing Enterprises ("FAHE")
- Fifth Third CDC
- Great Lakes Capital, LLC
- Hudson Housing Capital, LLC
- Huntington National Bank CDC
- InSite Capital
- Key Community Development Corporation
- Marble Cliff Capital
- Merchants
- National Equity Fund, Inc. ("NEF")
- Ohio Capital Corporation for Housing ("OCCCH")
- PNC Multifamily Capital
- R4 Capital
- RBC Community Investments
- RedStone
- Regions Bank
- US Bank CDC
- Wells Fargo

# WC Development

## Lenders

- Advantage Bank
- Bank of America
- Bank of Tennessee
- Bellwether Enterprise
- Capital One Bank
- Cedar Rapids Bank & Trust
- CF Bank
- Chemical Bank
- Citibank
- Fifth Third Bank
- First Commonwealth
- First Federal Bank
- First Financial Bank
- First Tennessee Bank
- Grandbridge Real Estate Capital
- The Huntington National Bank
- JP Morgan Chase
- Key Bank
- Main Street Bank
- Merchants Bank of Indiana
- Merchants Capital Corp.
- The Monticello Banking Company
- Park National Bank
- PNC Bank
- PR Mortgage
- Regions Bank
- RiverHills Bank
- Summit Community Bank
- Truist Bank
- United Bank of West Virginia
- USDA Rural Development
- Wells Fargo Bank
- WesBanco
- West Union Bank

# WC Development

## Financial Vehicles

- FHA insured loans, 221d4 and 223f
  - Brownfield credits
  - Housing Assistance Program ("HAP") Section 8 contracts through Public Housing Agencies
- USDA Rural Development 538 guaranteed loans
  - Federal Home Loan Bank ("FHLB") Affordable Housing Program funds
  - Project Based Rental Assistance contracts through HUD and State Housing Finance Agencies ("SHFA's")
- USDA Rural Development 515 direct loans
  - FHLB match funds
  - 811 contracts
  - National Housing Trust Funds
- Public Housing Replacement Factor Funds
  - HUD's Mark to Market program
  - Energy Credits
  - New Markets Tax Credits
  - Low-Income Housing Tax Credits
- HOME funds
  - Tax exempt bonds with 4% LIHTC credits
- State trust funds
  - Tax Credit Assistance Program funds
- Federal historic tax credits
  - Exchange funds or 1602 funds
- State historic tax credits

# WC Development

Legal & Accounting Representation

RENO & CAVANAUGH<sub>PLLC</sub>

**IceMiller**  
LEGAL COUNSEL

**SMS**  
CPAs  
ASSOCIATES



**DOZ**

Reno & Cavanaugh, PLLC, and Ice Miller, LLP,  
serve as outside counsel and consultants to  
WCCI.

Stemen, Mertens, Stickler, CPA's and  
Company, Novogradac & Company, and DOZ  
serve as accounting firms for WCCI.





# WC Development Personnel

Key Development Staff at WCCI

# Key WC Development Personnel

Xin “Daisy” An, CPA - Development Accounting Controller



Xin “Daisy” An, CPA is the Development Accounting Controller at WCCI. Ms. An oversees the AP, AR, funding draws, acquisitions and financial recording of properties under development and construction.

After earning her Master of Accounting degree from The Ohio State University, Ms. An started her career as a financial analyst in the Financial Planning and Analysis team of a public company.

Barry Accountius - Vice President of Development



Barry Accountius serves as Vice President of Development. He has 25 years of development, construction, administration, and management experience in the affordable housing industry.

Prior to joining WCCI in 2009, Mr. Accountius worked for the Ohio Housing Finance Agency (OHFA). He is a National Development Council certified Housing Development Finance Professional and holds a real estate agent license with the state of Ohio. Mr. Accountius is a proud Navy veteran.

## Key WC Development Personnel

Chelsea Arlantico - Vice President / Corporate Counsel



Chelsea Arlantico serves as Assistant Vice President and Corporate Counsel for WCCI. Ms. Arlantico is responsible for securing sites, organizing and reviewing tax credit applications, assisting with closings, and providing legal support.

Prior to working at WCCI, Ms. Arlantico served as an Attorney Advisor for the Peace Corps Office of Inspector General. She is a licensed attorney in the District of Columbia. She received a B.A. in Government from Georgetown University and a J.D. from The George Washington University Law School.

Denis Blackburne - Senior Vice President / Georgia Office Manager



Denis Blackburne serves as Senior Vice President of Development and the Georgia Office Manager. He serves on the board of Emergent Structures, Savannah and previously served on the board of Southface Energy Institute, Atlanta. He is past Honorary Consul for France and Germany in Savannah.

Prior to joining WCCI in 2010, Mr. Blackburne was the CFO of a sustainable commercial real estate firm. He received his B.S. in Business Administration from Geneva University in Switzerland and his M.B.A. from the Kellogg School of Management at Northwestern University.



# Key WC Development Personnel

Andrew Cohen - Senior Vice President of Development / Maryland Office Manager



Andrew Cohen serves as a Senior Vice President of Development. Mr. Cohen has nearly 35 years of experience in real estate and affordable housing.

Mr. Cohen was previously employed with the Maryland Department of Housing and Community Development. Prior to public service, he was a Senior Development Officer with Enterprise Community Investment, Inc. Mr. Cohen has a B.A. in English from Kenyon College and a M.S. in Finance from Loyola University, Maryland.

Clay Cooper - Assistant Vice President



Clay Cooper serves as an Assistant Vice President for WCCI and oversees the development site selection process. His responsibilities include project management and analyzing and acquiring real estate development sites in each of the states in which WCCI operates.

Mr. Cooper received a B.A. in Economics and a B.A. in Asian Studies from St. Olaf University and a J.D. from Capital University Law School. He went on to complete a three-year legal clerkship with Reno and Cavanaugh PLLC where he specialized in affordable housing transactions and gained specific knowledge and insight in real estate development, complex financial transactions and agreements, and regulatory and legislative advocacy.

# Key WC Development Personnel

## Maia Cooper - Vice President of Development



Maia Cooper serves as Vice President and Associate General Counsel for WCCI. Ms. Cooper received a B.A. in History and a B.A. in French from Chapman University, magna cum laude, and went on to achieve a J.D. from The George Washington University Law School.

While in law school, Ms. Cooper served as a legal intern for the Honorable Judge Brian F. Holeman on the Superior Court for the District of Columbia. She also completed a year in corporate law serving as a law clerk in the Office of General Counsel for Pepco Holdings, LLC., an Exelon Company.

## Zebulin Culver - Assistant Vice President of Development



Zebulin Culver serves as Assistant Vice President of Development for WCCI and is responsible for organizing and reviewing tax credit applications, collecting, analyzing and presenting site data, and coordinating due diligence for loan closings.

Prior to joining WCCI in 2009, Mr. Culver worked as the production manager for a technology company specializing in education software and teacher training manuals. He received his B.A. in History from the University of Oregon and his M.A. in Liberal Arts from St. John's College, Annapolis.

# Key WC Development Personnel

Frank Fugate - Acquisitions Manager



Frank Fugate serves as Acquisitions Manager in development for WCCI and is responsible for site acquisitions, tax credit applications, and zoning and other pre-construction issues.

Mr. Fugate joined WCCI in 2005, and has been involved in the acquisition of real estate since the mid 1980's. Previously employed by the State of Ohio, Wears Kahn McMenamy, and the Galbreath Company, Mr. Fugate has worked as a broker and principal in negotiating land purchases, commercial leases, and purchases and sales of commercial and residential properties. He has a B.S. in Environmental Planning from Ohio University.

Alexander Keller – Vice President of Preconstruction



Alexander Keller is the Vice President of Preconstruction for WCCI. He connects the construction and development divisions with our third-party partners by preparing contracts, commitments, and organizing internal communications.

Mr. Keller has been with WCCI since 2014 in roles ranging from Superintendent to Project Manager. He has a B.S. from Saint Olaf College.

# Key WC Development Personnel

Garrett LeDonne - Vice President of Finance



Garrett LeDonne serves as Vice President of Finance for WCCI. Mr. LeDonne is responsible for underwriting housing tax credit and market rate investments. He secures financing and reviews housing tax credit applications. After a project is awarded, he assists with coordination between departments during the closing process, ensuring adherence to budgets and tax credit compliance.

Prior to joining WCCI, Mr. LeDonne worked for Caesars Entertainment as a Senior Analyst. Mr. LeDonne is a graduate of Vanderbilt University where he earned a B.A. in Economics and Mathematics.

Anne Little, Esq. - Vice President of Development and Associate General Counsel



Anne Little, Esq., serves as Vice President of Development. Her duties include leading the Pre-Construction Team, acting as a corporate attorney, and project and event management coordination throughout the pre-construction process..

Prior to joining WCCI, Ms. Little practiced law in private practice and in-house for Owens Corning, a building materials manufacturer. Ms. Little is a graduate of Wittenberg University, B.A. Mathematics, and the University of California, Hastings College of Law, cum laude.



# Key WC Development Personnel

Jonathan McKay - Vice President of Development



Jonathan McKay serves as Vice President of Development and is responsible for scoring, site selection, and application production. Mr. McKay is a National Development Council certified Housing Development Finance Professional.

Prior to joining WCCI, Mr. McKay was employed by NRP Group as Applications Manager and with Ohio Housing Finance Agency as Housing Grant Analyst, Multifamily Finance Coordinator, and Policy and Program Manager. Mr. McKay earned a B.A. from The College of Wooster and M.P.A. from The Ohio State University.

Gregory G. Mustric - Vice President of Development



Gregory G. Mustric serves as Vice President of Development and is responsible for analyzing and acquiring real estate development sites.

Prior to joining WCCI, Mr. Mustric was employed by a residential real estate investment firm, The Cornell Group, LLC, where he was responsible for researching and analyzing real estate markets for investment development. Mr. Mustric earned his B.A. in Communication from Wittenberg University.



# Key WC Development Personnel

P. Craig Patterson - Senior Vice President of Development / Michigan Office Manager



P. Craig Patterson serves as Senior Vice President and is responsible for land acquisition and development. Mr. Patterson has been responsible for leading the development of more than 60 affordable communities. He also serves as a board member for the recently formed Michigan Community Development Corporation.

Prior to joining WCCI in 2002, Mr. Patterson held several product development positions with Amway Corporation. He also served eight years as a Michigan National Guard officer in the Army Corps of Engineers. Mr. Patterson received his B.A. in Microbiology from The Ohio State University, and an M.B.A. from Grand Valley State University.

Jennifer Ricci - Vice President of Development



Jennifer Ricci serves as Vice President of Development and is responsible for managing closings, including processing construction loans, permanent loans, equity investments and other financing needs for WCCI. Ms. Ricci has 10 years of experience in real estate acquisitions, conventional loan closings, USDA Rural Development, HUD and SHFA financing transactions, and equity investor closings for affordable housing developments.

Prior to joining Woda in 2009, Ms. Ricci was employed as a paralegal for five years for Woda's outside legal counsel. Ms. Ricci holds a B.A. in English from Ohio University and a paralegal certificate from Capital University Law School.

# Key WC Development Personnel

Thomas Simons - Director / Senior Vice President of Development



Thomas Simons serves as Senior Vice President of Development and is responsible for site acquisition, housing and land development, funding applications and project management in multiple states. Mr. Simons has over 18 years of successful real estate experience developing over \$500 million in projects, consisting of over 6,000 affordable housing units.

Mr. Simons currently serves as a board member of the Coalition on Homelessness and Housing in Ohio and is a former board member of the Council for Rural Housing & Development of Ohio. He received his B.S. in Business Administration from Mount Vernon Nazarene University.

Tammy Stansbury - Vice President of Development / Kentucky Office Manager



Tammy Stansbury serves as Vice President of Development. Ms. Stansbury is a certified housing development finance professional through The National Development Council, a certified housing inspector for HUD programs, and a member of The Institute of Real Estate Management – REM 101 Successful Site Management.

Ms. Stansbury has previously served the Director of Housing, Finance, and Construction at the Kentucky Housing Corporation. Ms. Stansbury is a member and served as Co-Chair of Kentucky Interagency Homeless Coalition and is a member of the Kentucky Affordable Housing Coalition where she serves as the Secretary.

# Key WC Development Personnel

Nick Surak - Senior Vice President of Development / Indiana Office Manager



Nick Surak serves as Senior Vice President of Development. Mr. Surak is responsible for site selection, negotiation of purchase agreements, financial underwriting, and applications in various states.

Prior to joining WCCI, Mr. Surak held leadership positions within The Englewood Group and AHP Virginia, LLC. To date, his projects have totaled over 780 units of affordable housing with a project value in excess of \$135 million. Mr. Surak attended Marquette University where he obtained his B.A. in Political Science.

Bruce Watts - Vice President of Development



Bruce Watts serves as Vice President of Development in Virginia. Mr. Watts is responsible for land acquisition and development.

Prior to joining WCCI in 2012, Mr. Watts was the Senior Commercial Development Manager for the City of Norfolk, Virginia, where he resides. He serves as a board member for the City of Norfolk Board of Zoning Appeals. Mr. Watts is a graduate of Averett College and attended graduate school at Virginia Commonwealth University.



# Key WC Development Personnel

Mallory Weaver, HCCP - Vice President: Closings and Development Finance



Mallory Weaver serves as Vice President: Closings and Development Finance. She is responsible for managing closings, including processing construction loans, permanent loans, equity investments, and other financing needs for Woda Cooper. Ms. Weaver has also served Woda Cooper as treasurer, where she designed and implemented a security and management strategy for the \$50 million in deposits Woda Cooper holds throughout various financial institutions.

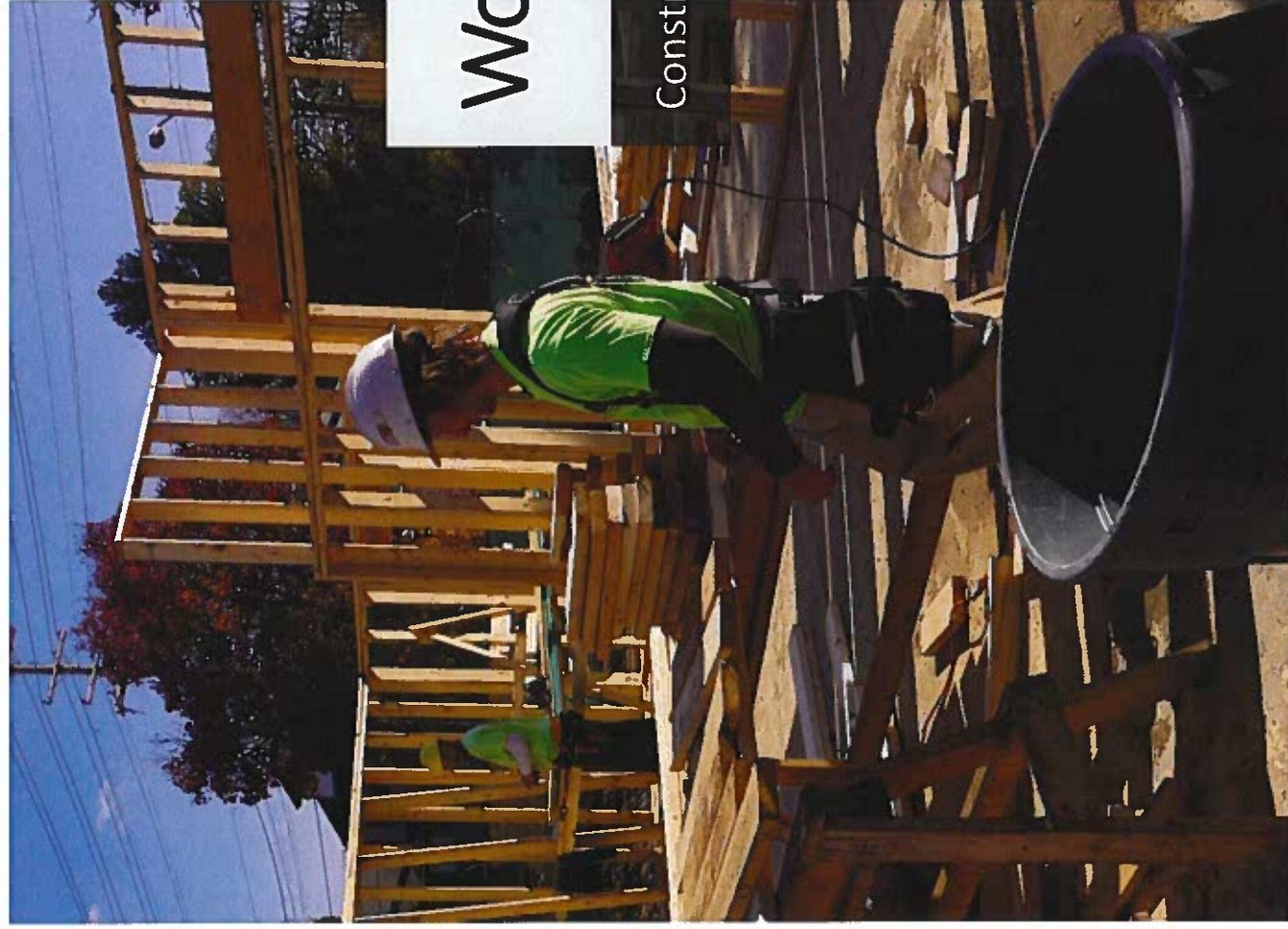
Ms. Weaver attended The Ohio State University Fisher College of Business where she received a B.S. in Business Administration with a specialization in Finance.

Parker Zee - Assistant Vice President of Development / Data Manager



Parker Zee serves as Assistant Vice President and Data Manager, in which capacity he assists in the site selection process. His responsibilities include helping to set the strategy for site acquisition, acquiring real estate development sites, project management, and overseeing the data needs of the development team.

Mr. Zee is a graduate of The Ohio State University where he graduated with a B.S. in Data Analytics.



# Woda Construction, Inc.

## Construction at WCCI

Woda Construction, Inc. ("WCI") is committed to efficiently constructing quality housing. WCI was incorporated on May 2, 1990, in Ohio, and is now a wholly owned subsidiary of WCCI.

# Woda Construction

## Construction Profile



WCI has completed new construction projects including:

- Multi-family garden apartment
- Townhouse developments
- Mid-rise elevator buildings
- Single story senior units with integrated garages
- Scattered site single family homes
- Single-family subdivisions

WCI also has extensive experience in substantial rehabilitation and adaptive re-use projects.



# Woda Construction

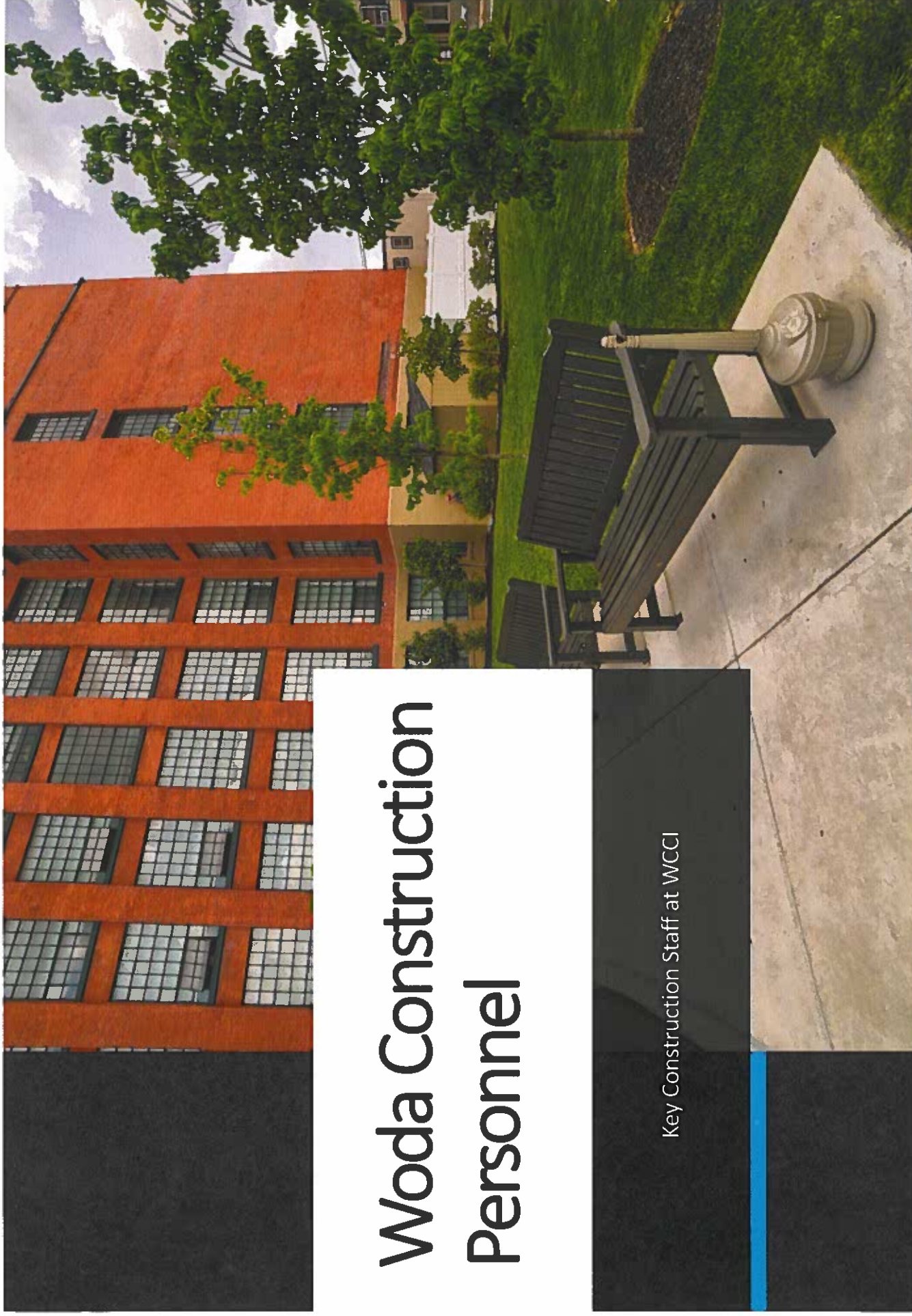
Green Construction & Development



- WCI personnel have worked extensively with development personnel to produce over 100 certified green developments representing over 4,500 units constructed.
- This includes eight LEED Platinum Certified Communities, eighteen LEED Gold Certified Communities, two Passive House Communities, and multiple Department of Energy Zero Energy Ready Home certifications
- [Click here](#) to find out more about Passive House at WCCI!

# Woda Construction Personnel

Key Construction Staff at WCCI





# Key Woda Construction Personnel

Brian Barczyk, CPA, CTP - Construction Controller



Brian Barczyk is Construction Controller for WCI. Mr. Barczyk is responsible for all financial statements for the division and works closely with project executives to ensure that all jobs are profitable and properly reported.

Mr. Barczyk has an undergraduate degree in Accounting / Banking from the University of Akron and graduated with honors from Weatherhead School of Management at Case Western University. In addition, he was an adjunct professor at University of Akron for several years teaching accounting, corporate finance and international business.

James Cappano - Senior Vice President



James Cappano serves as Senior Vice President for WCI. Mr. Cappano is responsible for providing leadership, guidance, and oversight of day-to-day field activities for his construction team. He has been involved in the supply side of numerous tax credit housing projects for nearly 20 years.

Before joining WCCI, Mr. Cappano began his career in the HVAC, plumbing, and building products field with Famous Supply in the mid-1990's. Mr. Cappano went on to start his own building material distribution company in 2005—expanded into a lumberyard in 2012. Mr. Cappano is an eight-year veteran of the United States Marine Corps.

# Key Woda Construction Personnel

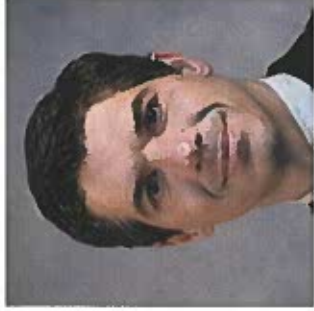
Joseph DiCesare - Director / Senior Vice President



Joseph DiCesare serves as Director, Senior Vice President for WCI. Mr. DiCesare is responsible for providing leadership, guidance and oversight of day-to-day field activities for his assigned team. With a diverse construction background, Mr. DiCesare's experience reaches across multiple industries including medical and general office, skilled care facilities, retail, multi-family, industrial, and recreational categories, while serving as Vice President at The DiCesare Company.

Mr. DiCesare earned a B.A. from Miami University.

Lance Paulick - Director / Senior Vice President



Lance Paulick serves as Senior Vice President for WCI. Mr. Paulick is responsible for construction leadership, communication, support and guidance for daily field activities of WCI associates for his assigned team.

Mr. Paulick joined WCI in 2013, bringing nearly 20 years of experience in the construction industry. Mr. Paulick's extensive background includes retail and commercial development, infrastructure, and homes in the single and multi-family categories. Mr. Paulick attended Georgia State University.

# Key Woda Construction Personnel

Art Smith - Vice President

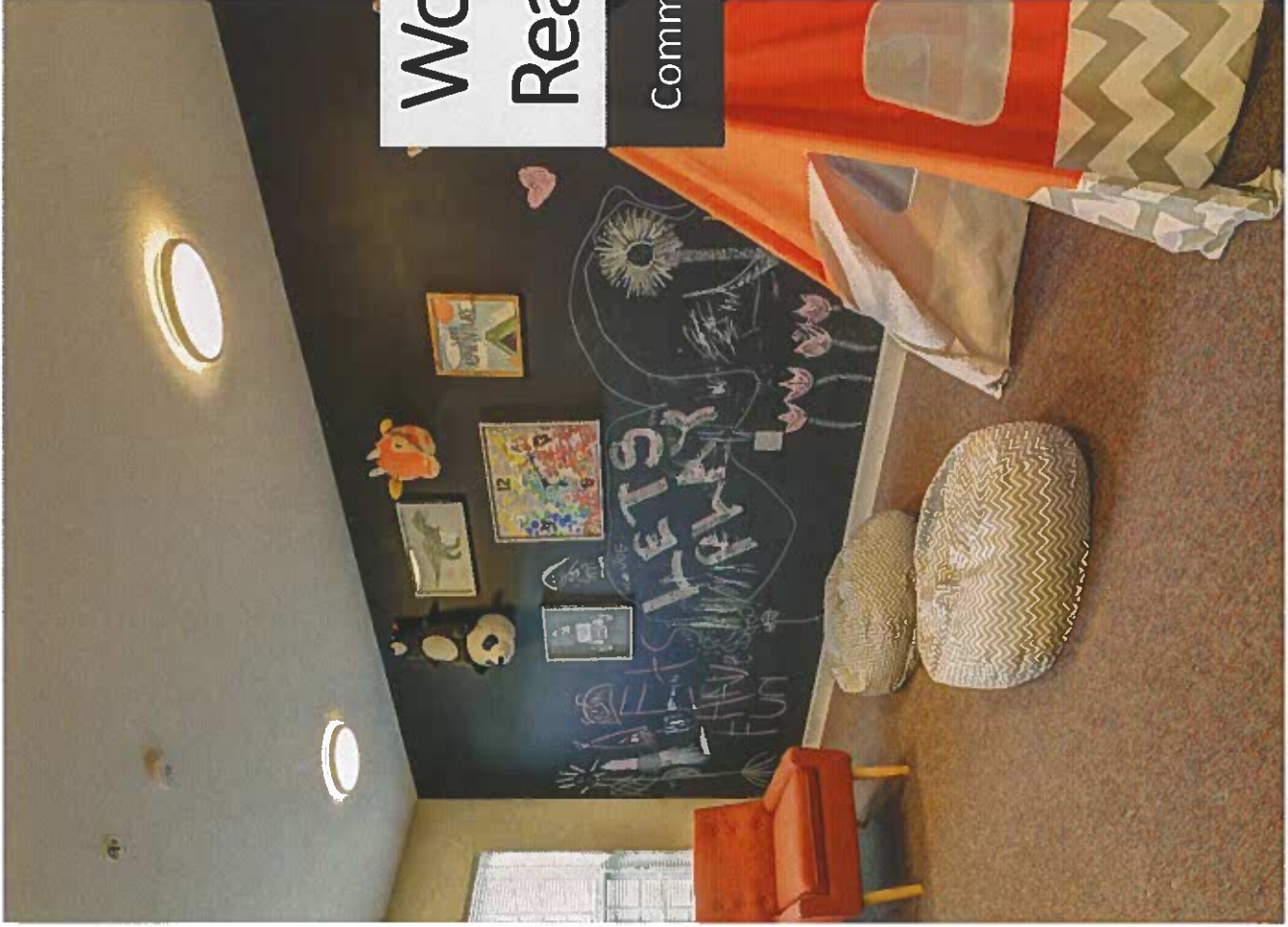


Art Smith serves as Vice President for WCI. Mr. Smith is responsible for overseeing the daily operations of the construction management teams covering the states of Indiana, Illinois, Iowa, Wisconsin, and Kentucky.

Prior to joining WCI in 2010, Mr. Smith was director of production for Sterling Construction of Indiana, Inc. which developed, constructed and managed Rural Development, affordable and market rate multi-family apartment homes. Mr. Smith previously worked with WPM Construction Inc., Herman & Kittle Properties, and Flaherty and Collins Properties.

Mr. Smith attended Purdue University and Indiana University Purdue University Indianapolis. He has also served on the Board of Directors of the Indiana Builders Association.





# Woda Management & Real Estate, LLC

Community Management at WCCI

Woda Management & Real Estate ("WM&RE") manages over 16,000 housing units throughout the WCCI geographic footprint.

With a staff of over 400 and the commitment to quality that accompanies long-term property ownership, WM&RE ensures every resident is offered a best-in-class experience.



# WM&RE

## Management Profile



- WM&RE are experts in all areas of property management, including leasing, maintenance, and compliance. The division operate communities catering to the elderly, seniors, families, veterans, the disabled, and many other special needs groups.
- The WCCI portfolio includes:
  - Senior affordable communities
  - Affordable multi-family apartments
  - Lease-to-own single-family homes
  - Replacement public housing
  - Redeveloped communities
  - Mixed-use developments
  - Market rate and mixed income
  - Veteran housing

# WM&RE Media

Visit WCCI's YouTube Page for More Videos



- Learn how WCCI's affordable housing affects seniors—[click here](#) to watch the video!



- Learn how WCCI super-serves veterans—[click here](#) to watch the video!



# WM&RE Personnel

Key Management Staff at WCCI

# Key Woda Management Personnel

Karla Aviles - Director of Property Management Accounting



Karla Aviles is the Director of Property Management Accounting for WM&RE. Ms. Aviles oversees the daily accounting operations of the hundreds of WCCI communities. Joining the Woda Cooper team in 2021, she previously served as an accountant and Chief Financial Officer.

Ms. Aviles received her B.S. in Accounting from The Minnesota School of Business, formally Globe University.

Shane D. Branham - Vice President of Facilities



Shane D. Branham serves as the Vice President of Facilities for WM&RE. Mr. Branham helps ensure the WCCI portfolio meets the highest physical standards and provides maintenance technicians with guidelines to prevent, diagnose, and correct facility maintenance issues. Through ongoing analysis and communication, he ensures improvements in construction are incorporated into future WM&RE communities.

Mr. Branham was previously the project coordinator and contract administrator for WCI. Prior to joining WM&RE, he was involved in construction management for Lifestyle Communities, Ltd. Mr. Branham graduated from The Ohio State University and holds a B.S. in Construction Systems Management.

# Key Woda Management Personnel

Adam Broderick - Director of Yardi



Adam Broderick serves as the Director of Yardi. Yardi is the central database that tracks all elements of WM&RE's business. Utilizing this data, Mr. Broderick works cross-departmentally to help implement processes that affect positive change for residents, employees, vendors, and investors.

Before joining WCCI, Mr. Broderick worked at Dominion Management Services as the Data Manager and CommonBond Communities as the Director of Information Technology. Mr. Broderick graduated from Concordia University in St. Paul, MN, with a B.S. in Management Information Technology.

Michael Collins - Vice President of Communications



Michael Collins oversees property marketing and serves as Vice President of Communications for WM&RE. Mr. Collins has over a decade of success in marketing, public relations, communications and advertising in media agency environments and he holds digital marketing certifications from Google, Bing, Microsoft, and HubSpot. In addition, Mr. Collins oversees the training of new and existing staff, ensuring that everyone at WCCI receives the same high-quality education.



# Key Woda Management Personnel

Terry Earhart, HCCP, C3P, CHAM - Regional Vice President



Terry Earhart, HCCP, C3P, CHAM, serves as Regional Vice President for WM&RE, and is responsible for property operations in Ohio, Georgia, Maryland, and South Carolina. Mr. Earhart is the team leader for three regional managers, six district managers. He has over 33 years of property management experience.

Prior to joining WM&RE, Mr. Earhart has been a vice president of asset and property management. He also served in The Air Force Reserve from 1982 to 1988.

Jenny Feng - Accounting Manager



Jenny Feng is an Accounting Manager for WM&RE. Ms. Feng and her team are responsible for the accounting and financial reporting within her portfolio. They coordinate the quarterly and year-end financials for investors and lenders in addition to overseeing day to day banking activity.

Ms. Feng has a B.A. in Business from The Ohio State University, Fisher College of Business.

# Key Woda Management Personnel

Laura George – Accounting Manager



Laura George is an Accounting Manager for WM&RE. Ms. George and her team are responsible for the accounting and financial reporting within her portfolio. They coordinate the quarterly and year-end financials for investors and lenders in addition to overseeing day to day banking activity.

Ms. George has been with Woda Cooper Companies for over 15 years and has been in property management for 30 years. She has an B.A. in Accounting from Franklin University.

Erica Green, HCCP, STAR, NPCC - Director / Regional Vice President



Erica Green, HCCP, STAR, NPCC, serves as Regional Vice President for WM&RE, and is responsible for property operations for properties located in West Virginia, Ohio, and Maryland. She is the team leader for five regional managers. Ms. Green has held various roles at WM&RE, since starting in 2012.

Ms. Green holds her A.A. in health care administration from Phoenix University and graduated summa cum laude from Ashford University, receiving her B.A. in Health Care Administration with a minor in Social and Criminal Justice. Ms. Green graduated with an M.A. in health care administration in July 2014.

# Key Woda Management Personnel

Katie Mitchell - Accounting Manager



Katie Mitchell is an Accounting Manager for WM&RE. Ms. Mitchell and her team are responsible for the accounting and financial reporting within her portfolio. They coordinate the quarterly and year-end financials for investors and lenders in addition to overseeing day to day banking activity.

Ms. Mitchell has an M.A. in Accounting as well as a M.A. in Business Administration from Ohio Dominican University.

Michelle Proulx, HCCP, STAR - Regional Vice President



Michelle Proulx serves as Regional Vice President for WM&RE and is responsible for commercial and residential affordable housing apartments in Illinois, Wisconsin, Indiana, Kentucky, and Tennessee. Active in the multifamily industry since 1989, Ms. Proulx has held many vice president and director roles over the last 10 years.

Over the course of her career, Ms. Proulx has opened more than 50 new communities, been on the disposition team for more than 25 properties, led varying sizes of teams managing up to 11,000 units, and served on the board for the DC chapter Association of Training & Development.

# Key Woda Management Personnel

Kathleen Osterman, HCCP, STAR, IREM - Regional Vice President



Kathleen Osterman, HCCP, STAR, IREM, serves as Regional Vice President for WM&RE, and is responsible for commercial and residential affordable housing apartments in Pennsylvania, Michigan, North Carolina, Wisconsin and Virginia.

Ms. Osterman has nearly 20 years of property management experience, previously working for Independent Management Services and McKinley Properties. She holds a degree from Grand Valley State University.

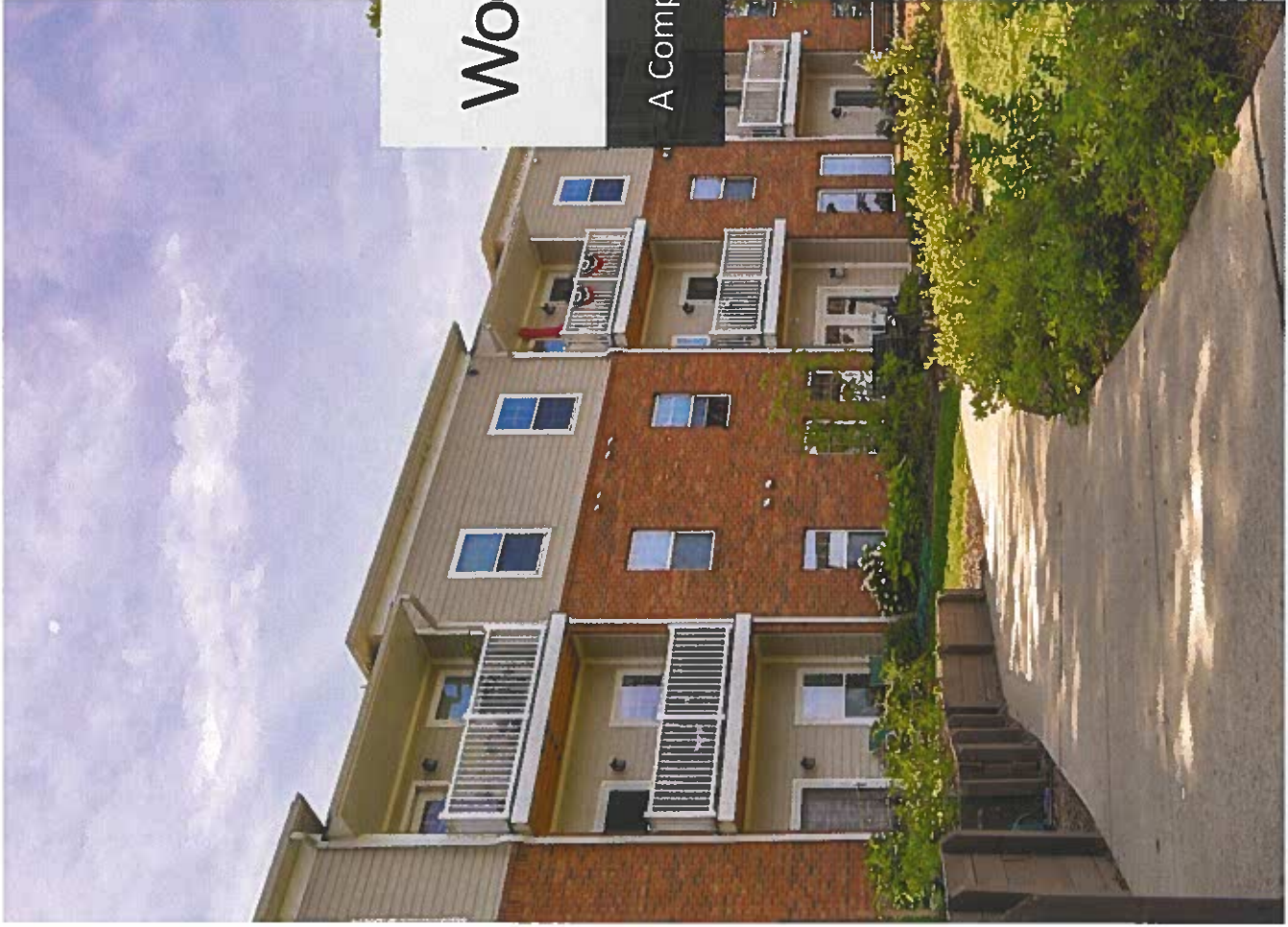
Kristin Powell - Accounting Manager



Kristin Powell is an Accounting Manager for WM&RE. Ms. Powell and her team are responsible for the accounting and financial reporting within her portfolio. They coordinate the quarterly and year-end financials for investors and lenders in addition to overseeing day to day banking activity.

Before joining WCCI, Ms. Powell worked in property management at T&R Properties and Manley, Deas & Kochalski, LLC. She went to Otterbein University, where she received a B.S. in Accounting.





# Woda Cooper Communities

## A Comprehensive List

- Jeffrey J. Woda and David Cooper, Jr. act as managing members of Woda Cooper Communities, LLC, the entity that controls the ownership of the more than 16,000 housing units we have developed and constructed over the past 30+ years. With over 350 affordable communities completed, we have only ever sold one (in 2006).
- We take seriously the commitment that we make to the communities where we develop and to the over 30,000 people that we house.



# List of Woda Cooper Communities

## Affordable Properties (Alphabetical)

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
123 Club (New)	Beaufort	SC	40	IO	X	X	X	X
123 Club (Old)	Beaufort	SC	40	Sold				
43 Town Square	Lima	OH	47	IO	X	X	X	X
Abby's Crossing	Bethesda	OH	42	IO	X	X	X	X
Adair Court	Atlanta	GA	91	IO	X	X	X	X
Alexander Yard	New Lexington	OH	42	IO	X	X	X	X
Allegany Junction	Frostburg	MD	40	ID	X	X	X	
Alston Park	Cincinnati	OH	39	IO	X	X	X	X
Amboy Meadows	Amboy	IL	12	IO	X			X
Anderson Crossing	Valparaiso	IN	92	IO	X	X	X	X
Anderson Greene	Cedar Rapids	IA	44	IO	X	X	X	X
Anderson Greene II	Cedar Rapids	IA	48	UC	X	X	X	
Apple Glen	Van Wert	OH	40	IO	X	X	X	X
Ardmore Crossing	Scioto Township	OH	50	IO	X	X	X	X
Arlington Greene	London	KY	40	IO	X	X	X	X
Armenian Place	Erie	PA	50	IO	X	X	X	X
Ashburn Greene	St. Clairsville	OH	40	IO	X	X	X	X
Ashland Essex House	Ashland	OH	45	IO		X	X	
Ashley Villa	Ashley	OH	23	IO			X	
Aspen Greene	Byesville	OH	48	IO	X	X	X	X
Atcheson Place	Columbus	OH	80	UC	X	X	X	
Atz Place	Kendallville	IN	38	IO	X	X	X	X
Audubon Crossing	Dayton	OH	50	IO	X	X	X	X
Autumn Run	Hardy Twp.	OH	38	IO	X	X	X	X
Bailey Court	Standardsville	VA	32	IO	X	X	X	X
Bardolph Apts	Bardolph	IL	8	IO				X
Barley Square	Reading	PA	57	IO	X	X	X	X
Barton Greene	Greeneville	TN	50	IO	X	X	X	X
Bayberry Place	Keyser	WV	66	IO	X	X	X	X

# List of Woda Cooper Communities

## Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Bayridge Greene	Keyser	WV	40	IO	X	X	X	X
Beardstown Apts	Beardstown	IL	12	IO	X			X
Beaumont Greene	Canaan Twp.	OH	40	IO	X	X	X	X
Beaumont Place	New Holland	OH	12	IO	X	X	X	X
Beaver Meadows	Beaver	OH	24	IO		X	X	
Bell Diamond	Norfolk	VA	128	IO	X	X	X	X
Belle Prairie	Belpe	OH	40	IO	X	X	X	X
Blackhawk Apts	Oregon	IL	23	IO	X			X
Blackhawk Commons	Sheridan	IN	32	IO	X	X	X	X
Blue Ridge Landing	Benton	TN	48	IO	X	X	X	X
Boardman Lake	Traverse City	MI	112	IO	X	X	X	X
Boury Lofts	Wheeling	WV	73	IO	X	X	X	X
Boynton Village (Old)	Atlanta	GA	43	IO				
Braddock's Greene	Frostburg	MD	50	IO	X	X	X	X
Branham Crossing	Union City	IN	38	ID	X	X	X	
Breas Crossing	Shelbyville	KY	44	IO	X	X	X	X
Breas Crossing II	Shelbyville	KY	38	UC	X	X	X	
Brennan Pointe	Newport News	VA	44	IO	X	X	X	X
Brennan Pointe II	Newport News	VA	43	IO	X	X	X	X
Brentwood Greene	Kokomo	IN	60	IO	X	X	X	X
Brianwood	Jefferson County	OH	75	IO	X	X	X	X
Brianwood (IN)	Converse	IN	24	IO				X
Bridgeview Greene	St. Ignace	MI	40	IO	X	X	X	X
Brock Bridge Landing	Jessup	MD	38	UC	X	X		
Brooks Square	Brookston	IN	20	ID	X	X	X	
Brookside Commons	Traverse City	MI	72	IO	X	X	X	X
Brookston Duplexes	Brookston	IN	20	IO				X
Brookwood Apts	Matherville	IL	24	IO	X			X
Butler Crossing	Kingstree	SC	40	IO	X	X	X	X



# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Butler Crossing II	Kingstree	SC	42	IO	X	X	X	X
Cambridge Apts	Morris	IL	19	IO	X			X
Canaan Crossing	Madison	GA	60	UC	X	X	X	
Canterbury Place	Elkins	WV	50	IO	X	X	X	X
Capital Greene	Wheeling	WV	40	IO	X	X	X	X
Carnegie Greene at 39th	Wheeling	WV	39	ID	X	X	X	
Catawba Club	Berkeley Springs	WV	64	IO	X	X	X	X
Cavaller Greene	Corunna	MI	40	IO	X	X	X	X
Cedar Glen	Morgantown	WV	48	IO	X	X	X	X
Cedar Glen II	Morgantown	WV	51	IO	X	X	X	X
Center Crossing	Hickory	NC	50	UC	X	X	X	
Chandler Pointe	Wilton	IA	35	ID		X	X	
Charters Cove	St. Ignace	MI	24	IO	X	X	X	X
Chartwell Greene	Mt. Gilead	OH	40	IO	X	X	X	X
Cheboygan Shores	Cheboygan	MI	24	IO	X	X	X	X
Chelsea Greene	Shinnston	WV	32	IO	X	X	X	X
Chesterfield Village	Charleston	WV	24	IO			X	
Chestnut Greene	Corbin	KY	24	IO	X	X	X	X
City View Place	Richmond	VA	32	IO	X	X	X	X
Clay Meadows	Fayette	OH	48	IO	X	X	X	X
Clemons Greene	Lexington	SC	90	ID	X	X	X	
Clough Commons (New)	Waverly	OH	46	IO	X	X	X	X
Clover Ridge	McConnelsville	OH	24	IO	X	X	X	X
Colchester Apts	Colchester	IL	16	IO	X			X
Colonial Park (New)	Pomeroy	OH	48	IO	X	X	X	X
Colonial Park (Old)	Pomeroy	OH	48	Sold		X	X	
Columbus School	Baltimore	MD	50	IO	X	X	X	
Connolly Park	Beaver Falls	MI	32	IO	X	X	X	X
Country Place - Argenta	Argenta	IL	12	IO	X			X

# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Country Place - Braidwood	Braidwood	IL	24	IO				X
Country Place - Chrisman	Chrisman	IL	12	IO				X
Country Place - Coal City	Coal City	IL	24	IO	X			X
Country Place - Dwight	Dwight	IL	24	IO				X
Country Place - Louisa	Louisa	KY	36	IO	X			X
Country Place - Maroa	Maroa	IL	20	IO	X			X
Country Place - Moweaqua I	Moweaqua	IL	16	IO	X			X
Country Place - Moweaqua II	Moweaqua	IL	16	IO	X			X
Country Place - Ottawa	Ottawa	IL	24	IO	X			X
Country Place - Plymouth	Plymouth	IN	24	IO	X			X
Country Place - Portland II	Portland	IN	20	IO	X			X
Country Place - Scottsville	Scottsville	KY	43	IO				X
Country Place - Vandalia	Vandalia	IL	32	IO	X			X
Country Place - Villa Grove	Villa Grove	IL	23	IO	X			X
Country Place Apts - Olney	Olney	IL	16	IO	X			X
Country Place - Portland I	Portland	IN	24	IO	X			X
Coventry House	Tiffin	OH	30	IO	X	X	X	X
Cranberry Meadows	Beaver	OH	32	IO		X	X	
Crawford Place	Upper Sandusky	OH	30	IO	X	X	X	X
Crooked River	Alanson	MI	16	IO	X	X	X	X
Crossroads Meadow	Ebensburg	PA	51	IO	X	X	X	X
Crowfield Greene	Goose Creek	SC	42	IO	X	X	X	X
Crystal Valley	Middlebury	IN	40	IO	X	X	X	X
Culloden Greene	Culloden	WV	40	IO	X	X	X	X
Cumberland Meadows	Cumberland	MD	64	IO	X	X	X	X
Dawn Ridge	Carlisle	PA	58	IO	X	X	X	X
Decatur Downs	Decatur	MI	48	IO	X	X	X	X
Deer Run Apts	Plano	IL	18	IO	X			X
Devon House	Tiffin	OH	40	IO	X	X	X	X



# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Doranne Greene	Hartford	MI	49	IO	X	X	X	X
Douglas Greene	Sevierville	TN	80	IO	X	X	X	X
Drake Crossing	Clarion	PA	30	IO	X	X	X	X
Dunbury Greene	Columbus	OH	60	ID	X	X	X	
Dutch Ridge Place (New)	Parkersburg	WV	24	IO	X	X	X	X
Dutch Ridge Place (Old)	Parkersburg	WV	24	Sold		X	X	
East Newark Homes	Newark	OH	40	IO	X	X	X	X
Edinburgh Commons (New)	Edinburgh	IN	24	IO	X	X	X	X
Edison Crossing	Mount Clemens	MI	30	ID	X	X	X	
Edward's Crossing	Beaver	WV	44	IO	X	X	X	X
Edward's Crossing II	Beaver	WV	44	IO	X	X	X	X
Elk Meadows	Coalmont	TN	24	ID	X	X	X	X
Emerald Gardens	West Hamlin	WV	41	IO	X	X	X	X
Enchanted Glen	Colon	MI	36	IO	X	X	X	X
Essex Place	Upper Sandusky	OH	42	IO	X	X	X	X
Essex Place North	Sycamore	OH	10	IO	X	X	X	X
Evert's Hill	Circleville	OH	49	IO	X	X	X	X
Fairview Heights (New)	Mineral Point	WI	16	IO	X	X	X	X
Fairview Heights (Old)	Mineral Point	WI	16	Sold				
Fairway Crossing	Tiffin	OH	35	IO	X	X	X	X
Fairwood Commons	Columbus	OH	54	IO	X	X	X	X
Fayette Landing	Washington CH	OH	35	IO	X	X	X	X
Fellwood II	Savannah	GA	110	IO	X	X		X
Fellwood III	Savannah	GA	100	IO	X	X		X
Forest Edge	Rawson	OH	36	IO	X	X	X	X
Fox Run Crossing	Seal Township	OH	50	IO	X	X	X	X
Frankfort Place	Frankfort	OH	20	IO	X	X	X	X
Freedman Point	Hopewell	VA	68	IO	X	X	X	X
Frontier Run	Convoy	OH	16	IO	X	X	X	X



# List of Woda Cooper Communities

## Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Gables at Countryside Lane	Cadiz	OH	40	IO	X			X
Gables at Countryside Lane II	Cadiz	OH	24	IO	X	X	X	X
GDPM Indian Trail	Dayton	OH	35	ID		X	X	
GDPM Madrid Estates	Dayton	OH	100	ID		X	X	
GDPM Washington Village	Dayton	OH	8	ID		X	X	
GDPM Westerfield Drive	Dayton	OH	20	ID		X	X	
Glen Abbey	Dawson Springs	KY	24	IO	X	X	X	X
Glennview	Washington C.H.	OH	56	IO	X	X	X	X
Grace Meadows	Jeffersonville	OH	40	IO	X	X	X	
Gracefield Apartments	Ottawa	IL	24	IO	X			X
Grand View Place	Grand Rapids	MI	68	IO	X	X	X	X
Greene Gables	Short Gap	WV	51	IO	X	X	X	X
Greene Glen	Morgantown	WV	108	IO	X	X	X	X
Greensburgh Manor	Green	OH	50	IO	X	X	X	X
Hallet Crossing	Michigan Center	MI	24	IO	X	X	X	X
Hallmark Meridian	Dayton	OH	75	ID			X	
Hampton Pointe	Three Rivers	MI	24	IO	X	X	X	X
Harbor Meadows	Calabash	NC	60	UC	X	X	X	
Harmony Greene	Pooler	GA	49	IO	X	X	X	X
Harper's Crossing	Plainfield	IN	60	ID	X	X	X	
Hattie Greene	Urbana	OH	27	IO	X	X	X	X
Haven Crossing	Walton	KY	57	ID	X	X	X	
Hayden Senior	Springfield	OH	44	IO	X	X	X	X
Heather Apts	Spring Valley	IL	24	IO	X			X
Heathermoor	Weirton	WV	50	IO	X	X	X	X
Heathermoor II	Weirton	WV	32	IO	X	X	X	X
Heat'y Crossing	Bidwell	OH	32	IO	X	X	X	X
Heritage Apartments	Coshocton	OH	52	UC			X	
Heritage Greene	Washington C.H.	OH	50	IO	X	X	X	X

# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Heritage House	Beckley	WV	50	IO	X	X	X	X
Hiawatha Apartments	Iron River	MI	32	IO	X	X	X	X
Hickory Meadow	White Township	PA	51	IO	X	X	X	X
Highland Meadows	Lanark	IL	24	IO	X			X
Highlands Oglesby Apts	Oglesby	IL	32	IO	X			X
Hobbs Greene	Wheeling	WV	39	ID	X	X	X	
Holley Pointe	Portsmouth	VA	50	UC	X	X	X	
Honeybrook Greene	Utica	OH	36	IO	X	X	X	X
Hopper Commons	Frankstown Twp.	PA	52	ID	X	X	X	
Huston Hills	Cambridge	OH	50	IO		X	X	
Hyden Greene	Phillipi	WV	24	IO	X	X	X	X
Ivy Glen	Washington C.H.	OH	60	IO	X	X	X	X
Jacob's Crossing	Rio Grande	OH	42	IO	X	X	X	X
Jamestown Place	Jamestown	OH	24	IO	X	X	X	X
Jenkins Street Lofts	Columbus	OH	60	UC	X	X	X	
Jenny Greene	Hardeeville	SC	50	IO	X	X	X	X
Jeremy Park	Orwell	OH	36	IO	X	X	X	X
Jevue Apartments	New Martinsville	WV	40	UC		X	X	
Johnston Crossing	Johnston	IA	50	ID		X	X	
Joseph's Crossing (New)	Summersville	WV	42	ID	X	X	X	
Joseph's Crossing (Old)	Summersville	WV	42	IO	X	X	X	X
Joshua Landing	Minford	OH	40	IO	X	X	X	X
Junction City Apts. (New)	Junction City	OH	24	IO	X	X	X	X
Junction City Apts. (Old)	Junction City	OH	24	IO		X	X	
Kellinger Greene	Fairview Township	PA	56	UC	X	X	X	
Kensington Greene	Carroll County	OH	41	ID	X	X	X	X
Kershaw Greene I	Athens	OH	51	ID	X	X	X	
Kershaw Greene II	Athens	OH	56	ID	X	X	X	
Keyser Greene	Keyser	WV	38	IO	X	X	X	X

# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Kirkman Terrace	Hopkinsville	KY	45	UC	X	X	X	X
Koehler Crossing	Plainwell	MI	28	IO	X	X	X	X
Kreider Commons	Lebanon	PA	50	IO	X	X		X
LaBelle Greene	Wheeling	WV	40	IO	X	X	X	X
LaBelle Greene II	Wheeling	WV	40	IO	X	X	X	X
LaBelle Greene III	Wheeling	WV	40	IO	X	X	X	X
LaBelle Greene IV	Wheeling	WV	38	ID	X	X	X	
Lake Matherville Manor	Matherville	IL	24	IO	X			X
Lambert Landing I	Richmond	VA	64	ID	X	X	X	
Lambert Landing II	Richmond	VA	48	ID	X	X	X	
Landon Greene	Statesville	NC	60	ID	X	X	X	
Lanning House	Dennison	OH	30	IO	X	X	X	X
Laurel Greene	Clyde	OH	40	IO	X	X	X	X
Laurelhurst	Clyde	OH	44	IO	X	X	X	X
Lawrence Downs	Lawrence	MI	48	IO	X	X	X	X
Leewood Place	Fremont	OH	40	IO		X	X	X
Liberty Pointe	Petersburg	VA	48	IO	X	X		X
Lightner Greene	New Castle	PA	50	IO	X	X	X	X
Lincoln House	Owosso	MI	28	IO	X	X	X	X
Lincoln Northside Apts	Lincoln	IL	16	IO	X			X
Lincoln Village	Lincoln	IL	40	IO	X			X
Linden Greene	Jamestown	OH	38	IO	X	X	X	X
Livingston Greene	Fowlerville	MI	32	IO	X	X	X	X
Lloyd House	Menominee	MI	44	IO	X	X	X	X
Lockbourne Greene	Columbus	OH	60	ID	X	X	X	
Lockwood Greene	Loudonville	OH	26	IO	X	X	X	X
Lockwood Station	Loudonville	OH	6	IO	X	X	X	X
Logansport Apartments	Logansport	IN	24	IO				X
Lombard Commons	Dallastown Borough	PA	43	ID	X	X	X	



# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Lowcountry Crossing	Denmark	SC	34	IO	X	X	X	X
Luke's Crossing	Johnstown	OH	40	IO	X	X	X	X
Madison Grove	Slippery Rock	PA	50	IO	X	X	X	X
Magnolia Greene	LaVale	MD	40	UC	X	X	X	
Majors Crossing	Ashtabula	OH	40	IO	X	X	X	X
Mallaleu Pointe	East Point	GA	67	IO	X	X	X	X
Mallory Meadows	Dunkirk	OH	24	IO	X	X	X	X
Manistee Place	Manistee	MI	46	IO	X	X	X	X
Maple Heights	Portland	IN	16	IO				X
Maple Hill Apts.	Cadillac	MI	24	IO	X	X	X	X
Maple Leaf	Manawa	WI	20	UC	X	X	X	
Mary Harvin Center	Baltimore	MD	56	IO	X	X		
Mason Greene	Monticello	KY	68	IO	X	X	X	X
McCalla Greene	Milan	MI	32	IO	X	X	X	X
McCormick Crossing	Sistersville	WV	48	ID	X	X	X	X
McCormick Greene	Sistersville	WV	24	IO	X	X	X	X
McKay Manor	Breese	IL	58	ID		X	X	
Meadow Glen	Carey	OH	50	IO	X	X	X	X
Meadows Apts	Coal City	IL	24	IO	X			X
Meridian Commons	Portland	IN	20	ID	X	X	X	
Meridian Greene	Wintersville	OH	66	IO	X	X	X	X
Meridian Greene II	Wintersville	OH	40	IO	X	X	X	X
Meyers Greene	Corey	PA	52	IO	X	X	X	X
Milan Village	Milan	MI	36	IO	X	X	X	X
Millersview Crossing	Millersville	MD	54	ID	X	X	X	
Moccasin Run	Galion	OH	36	IO	X	X	X	X
Monarch Greene	Columbus	OH	43	IO	X	X	X	X
Monmouth Manor	Monmouth	IL	32	IO	X			X
Montgomery Crossing	Ashland	OH	50	UC	X	X	X	

# List of Woda Cooper Communities

## Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Morrison Place	Georgetown	OH	30	IO		X	X	
Muirwood Greene (New)	Romney	WV	50	ID	X	X	X	X
Muirwood Greene (Old)	Romney	WV	50	IO	X	X	X	
Muncy Greene	Lycoming	PA	60	IO	X	X	X	X
Nantucket Greene	Upper Sandusky	OH	40	IO	X	X	X	X
Nelsonville School	Nelsonville	OH	33	IO	X	X	X	X
New Forge Crossing	Washington Twnship	PA	60	IO	X	X	X	X
North Ave. Gateway II	Baltimore	MD	65	IO	X	X		
North Avenue Gateway I	Baltimore	MD	64	IO	X	X	X	
Northlake Center	Charlotte	NC	78	ID	X	X	X	
Northside Drive Apts.	Crossville	TN	40	IO	X	X		X
Norwood Greene	Marrietta	OH	40	IO	X	X	X	X
Oak Hollow	Summerville	SC	44	IO	X	X	X	X
Oak Ridge Apartments	Adams	WI	24	UC	X	X	X	
Oak Valley Gardens	Glenville	WV	28	IO	X	X	X	X
Oakmont Greene	Beckley	WV	48	IO	X	X	X	X
Oakmont Greene II	Beckley	WV	50	IO	X	X	X	X
Old Firetower	Greenville	NC	60	IO	X	X	X	X
Olde Hickory	Canal Lewisville	OH	33	IO	X	X	X	X
Olde Mill	Saugatuck	MI	24	IO	X	X	X	X
Oliver Crossing	Linden	TN	24	IO	X	X	X	X
Orchard Glen	Orville	OH	32	IO	X	X	X	X
Orchard View Manor	Gobles	MI	24	IO	X			X
Osborn Commons	Saulte St. Marie	MI	65	IO	X	X	X	X
Paige Regency Apts.	Wheeling	WV	3	IO		X	X	
Paigelynn Place	Swanton	OH	60	IO	X	X	X	X
Paint Landing	Paintsville	KY	24	IO	X	X	X	X
Paint Lick Station	Paintsville	KY	24	IO	X	X	X	X
Parker Glen	Champaign	IL	54	ID		X	X	



# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Parkview Apartments	Huntley	IL	24	IO	X			X
Parkway Apartments	Parkway	IL	24	IO	X			X
Parrish Greene	Estill	SC	28	IO	X	X	X	X
Partridge Place	Paulding	OH	42	IO	X	X	X	X
Patrick Place	Paulding	OH	24	IO	X	X	X	X
Patterson Crossing	Frankfort	MI	56	IO	X	X	X	X
Pebblecreek Crossing	Richmond	KY	48	IO	X	X	X	X
Pembrook Greene	Lodi	OH	18	IO	X	X	X	X
Penn Square	Baltimore	MD	79	IO	X	X	X	
Penn Square II	Baltimore	MD	59	IO	X	X		
Pennington Crossing	Johnson City	TN	42	IO	X	X	X	X
Perkins Field	Warner Robbins	GA	90	IO	X	X	X	
Pheasant Ridge	McConnellsville	OH	24	IO	X	X	X	X
Pinecrest Greene	Charleston	SC	46	IO	X	X	X	X
Plainsview Greene	Tellico Plains	TN	24	ID	X	X	X	
Polo Greene	Martinsburg	WV	64	IO		X	X	
Pond Grove Crossing	Otterbein	IN	36	ID	X	X	X	
Pontiac A - Northpointe Apts	Pontiac	IL	20	IO	X			X
Pontiac I - Edgefield Apts	Pontiac	IL	16	IO	X			X
Portland School	Portland	MI	29	IO	X	X	X	X
Prescott Greene	Bunker Hill	IN	32	IO	X	X	X	X
Preston's Crossing	Prestonsburg	KY	24	IO	X	X	X	X
Primrose Commons	Converse	IN	24	ID	X	X	X	
Pringle House	Buckhannon	WV	40	IO	X	X	X	X
Proctor Place	Indianapolis	IN	61	ID	X	X	X	
Prospect Yard	Cleveland	OH	42	IO	X	X	X	X
Providence Greene	Wheeling	WV	50	IO	X	X	X	X
Providence Greene II	Wheeling	WV	50	IO	X	X	X	X
Pruitt Square	Logansport	IN	24	ID	X	X	X	

# List of Woda Cooper Communities

## Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Quail Meadow	Fostoria	OH	50	IO	X	X	X	X
Quaker Meadow	Hermitage	PA	40	IO	X	X	X	X
Raceland Meadows	Raceland	KY	32	IO	X	X	X	X
Ravenwood Crossing	Rocky Mount	NC	80	IO	X	X	X	X
Raystown Crossing	Shippensburg	PA	50	IO	X	X	X	X
Richwood Greene	Richwood	OH	42	IO	X	X	X	X
Ridgewood Greene	Reynoldsville	PA	40	IO	X	X	X	X
Riverbirch Greene	Washington C.H.	OH	60	IO	X	X	X	X
Rivergate Greene	Charlotte	NC	72	IO	X	X	X	X
Riverview Place	Ripley	OH	33	IO	X	X	X	X
Robinson Overlook	Columbia	MD	48	ID	X	X		
Rooney Ridge	Roanoke Rapids	NC	50	IO	X	X	X	X
Rosewood Manor	Peebles	OH	24	IO	X			X
Royal Oaks	Smithville	TN	24	ID	X	X	X	
Russell's Crossing	Barnesville	OH	39	IO	X	X	X	X
Russell's Place	Barnesville	OH	32	IO	X	X	X	X
Ruth Park	Traverse City	MI	48	ID	X	X	X	
Saluda Commons	Saluda	SC	40	IO	X	X	X	X
Savannah Gardens	Savannah	GA	85	UC			X	
Sawgrass Greene	Grayson	KY	54	IO	X	X	X	X
Schoenbrunn Greene	Sugarcreek	OH	40	IO	X	X	X	X
Scholar House	Columbus	OH	30	UC			X	
Seaborn Greene	Bamberg	SC	40	IO	X	X	X	X
Seven45 Stocking	Grand Rapids	MI	50	IO	X	X	X	X
Shelby Commons	Minneapolis	MN	46	ID	X	X		
Shepard Crossing	Port Clinton	OH	50	IO			X	
Shepard Greene	Zebulon	NC	50	IO	X	X	X	X
Shumway Apts	Taylorville	IL	24	IO	X			X
Silver Lakes	Madison	GA	44	IO	X	X		X



# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Simons Crossing	Clarksburg	WV	38	Dead				
Sky Meadows	Cambridge	OH	40	IO		X	X	
Somerset Court	Baltimore	MD	65	UC	X	X		
Sparrow Ridge	Hebron	KY	96	UC	X	X	X	
St. C. Courtyard	St. Clairsville	OH	24	IO	X	X	X	X
St. Paul Terrace	Parkersburg	WV	44	IO	X	X	X	X
St. Stephens Court	Baltimore	MD	72	IO		X		
Stableford Crossing	West Union	OH	18	IO	X	X	X	X
Stanton Oaks (New)	Atlanta	GA	43	IO	X	X		X
Stanton Park	Atlanta	GA	56	ID	X	X	X	
Sterling Greene	Fayetteville	TN	48	IO	X	X	X	X
Stevenson Square	Decatur	TN	24	IO	X	X	X	X
Stockton Greene	Charleston	WV	43	ID	X	X	X	
Stone Brooke	Weirton	WV	44	IO	X	X	X	X
Stone Ridge Commons	Springettsbury Twp.	PA	34	UC	X	X	X	
Stoney Ridge	Cadiz	OH	28	IO	X	X	X	X
Streator Manor	Streator	IL	32	IO	X			X
Sugartree Terrace	New Straitsville	OH	24	IO		X	X	
Summer Tree Terrace (New)	Jeffersonville	OH	24	ID	X	X	X	
Summer Tree Terrace (Old)	Jeffersonville	OH	24	IO	X	X	X	X
Sycamore House	Durand	MI	40	IO	X	X	X	X
Sycamore Meadows	Sycamore	IL	24	IO	X			X
Tall Trees	Tiffin	OH	42	IO	X	X	X	X
Tate Commons	New Bern	NC	68	UC	X	X	X	
Taylor Crossing	Green Bay	WI	36	IO	X	X	X	X
Terrapin Park (New)	Parkersburg	WV	49	IO	X	X	X	X
Terrapin Park (Old)	Parkersburg	WV	49	Sold		X	X	
The Banks at Berkley	Norfolk	VA	50	IO	X	X	X	X
The Hamilton	Pontiac	MI	42	IO	X	X	X	X

# List of Woda Cooper Communities

## Affordable Properties (Alphabetical) [Continued]

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
The Livingston	Columbus	OH	45	IO	X	X	X	X
The Lofts	Washington C.H.	OH	31	IO	X	X	X	X
Thompson Greene	Butler	PA	50	IO	X	X	X	X
Tibbits Greene	Coldwater	MI	24	IO	X	X	X	X
Tooley Place	Elizabeth City	NC	36	IO	X	X	X	X
Towne Creek Crossing	Walton	KY	44	IO	X	X	X	X
Tremont Greene	Tiffin	OH	40	IO	X	X	X	X
Tristan Ridge	Eminence	KY	44	IO	X	X	X	X
Troon Crossing	Washington Township	OH	60	IO	X	X	X	X
Union City Properties	Union City	IN	38	IO				X
Ursula Park	Blanchester	OH	36	IO	X	X	X	X
Valley Greene	Barnesville	OH	24	IO	X	X	X	X
Valley View Gardens	Dunlap	TN	64	IO	X			X
Victoria Place	Waverly	OH	30	IO	X	X	X	X
Victory Place	Barboursville	WV	50	IO	X	X	X	X
Viewmont Square	Hickory	NC	50	IO	X	X	X	X
Village Square (New)	Peebles	OH	30	IO	X	X	X	X
Village Square (Old)	Peebles	OH	30	IO	X	X	X	X
Viriden Apartments	Viriden	IL	16	IO	X			X
Washington School	Washington C.H.	OH	42	IO	X	X	X	X
Waterman Gardens Apts (New)	Waterman	IL	24	IO			X	
Waterman Gardens Apts (Old)	Waterman	IL	24	IO	X			X
Wayne Crossing	Greenville	OH	48	IO	X	X	X	X
Webster Glen	Peebles	OH	12	IO	X	X	X	X
Webster Greene	Peebles	OH	36	IO	X	X	X	X
Wellington Place	Ottawa	OH	34	IO	X	X	X	X
Wendler Commons	Columbus	OH	62	UC	X	X	X	
Wesley Yard	Crestline	OH	46	IO	X	X	X	X
Westridge Apts (New)	Mendota	IL	24	IO	X	X	X	X



# List of Woda Cooper Communities

Affordable Properties (Alphabetical) [Continued]

[illegible]



# List of Woda Cooper Communities

## Market Rate Properties (Alphabetical)

Community Name	City	State	Units	Status	Owner	Developer	General Contractor	Property Manager
Arlington Terrace	London	KY	16	IO	X	X	X	X
Laurel Terrace	Clyde	OH	10	IO	X	X	X	X
Lloyd House II	Menominee	MI	13	IO	X	X	X	X
Stone Center Lofts	Wheeling	WV	22	IO	X	X	X	X
Wellington Terrace	Ottawa	OH	8	IO	X	X	X	X

# Woda Cooper Companies, Inc.

## List of Developments Completed In 2016-2022

Property Name	Property Address	City	State	Units	Type of Financing	Construction Type	Product Type	Income Levels	PIU Year	Services Performed	Construction Cost
Hyden Greene	43 Hyden Greene Drive	Phillippi	WV	24	LHTR/RD/538	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$4,824,930
Hawthorn Apartments	650 Seiden Road	Iron River	MI	32	LHTR/RD 515	Rehabilitation	Senior	60% AMI or less	2016	Property Management/Owner	\$3,880,066
Builer Crossing	208 Martin Luther King Avenue	Kingsree	SC	40	LHTR/RD	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$7,324,348
Fayette Landing	719 Rawlings Street	Washington Court House	OH	36	LHTR	Rehabilitation/New Construction	Family	60% AMI or less	2016	Property Management/Owner	\$4,287,630
McComick Greene	244 Wood Street	Sidarsville	WV	24	LHTR/RD 538	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$4,796,008
Thompson Greene	235 N. Durfy Road, Suite 110	Butler	PA	50	LHTR/HOME	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$11,345,154
Kreider Commons	631 North 8th Street	Lebanon	PA	50	LHTR/AHP/HOME	Adaptive Reuse	Senior	60% AMI or less	2016	Property Management/Owner	\$11,984,895
Woodyard Greene	56 Pioneer Circle	Elizabeth	WV	30	LHTR/538	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$6,159,997
Silver Lakes	439 W. Jefferson Street	Madison	GA	44	LHTR	New construction	Senior	60% AMI or less	2016	Property Management/Owner	\$7,511,239
Breas Crossing	3025 Square Circle Road	Shelbyville	KY	44	LHTR	New construction	Senior	60% AMI or less	2016	Property Management/Owner	\$6,272,989
Willoughbach Terrace	30707 Lake Shore Boulevard	Willowick	OH	50	LHTR	New construction	Senior	60% AMI or less	2016	Property Management/Owner	\$8,806,662
Enchanted Glen	466 South Burr Oak Rd.	Colon	MI	36	LHTR/RD515	Rehabilitation	Family	60% AMI or less	2016	Property Management/Owner	\$4,666,852
Oliver Crossing	105 Beech Street	Linden	TN	24	LHTR	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$4,266,411
Greensburgh Manor	1960 Burgess Drive	Uniontown	OH	50	LHTR	New construction	Senior	60% AMI or less	2016	Property Management/Owner	\$8,586,139
Labelle Greene	10 Mayo Street	Wheeling	WV	40	LHTR	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$8,586,139
Brennan Pointe	3100 Warwick Blvd.	Newport News	VA	44	LHTR	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$7,402,599
Bailey Court	52 Village Road	Stanardsville	VA	32	LHTR/RD 515/538	Rehabilitation	Family	60% AMI or less	2016	Property Management/Owner	\$3,670,077
The Banks at Berkeley	701 South Main Street	Norfolk	VA	50	LHTR	New construction	Family	60% AMI or less	2016	Property Management/Owner	\$9,278,423
Pebblecreek Crossing	418 Big Hill Avenue	Richmond	KY	48	LHTR	New construction	Senior	60% AMI or less	2017	Property Management/Owner	\$6,962,359
Lawrence Downs	607 South Paw Paw Street	Lawrence	MI	48	LHTR/RD515	Rehabilitation	Family	60% AMI or less	2017	Property Management/Owner	\$4,981,794
TerraPark	2412 Covert Street	Parkersburg	WV	49	LHTR	Rehabilitation	Family	60% AMI or less	2017	Property Management/Owner	\$6,816,592
Parrish Greene	57 Parrish Greene Lane	Estill	SC	28	LHTR	New construction	Family	60% AMI or less	2017	Property Management/Owner	\$5,333,841
Grand View Place	936 Front Avenue NW	Grand Rapids	MI	68	LHTR	New construction	Family	60% AMI or less	2017	Property Management/Owner	\$14,569,745
Lincoln House	120 Michigan Avenue	Owosso	MI	28	LHTR/RD 538	Adaptive Reuse	Senior	60% AMI or less	2017	Property Management/Owner	\$5,949,322
Events Hill	532 South Court Street Apt	Orkville	OH	49	LHTR	Adaptive Reuse	Senior	60% AMI or less	2017	Property Management/Owner	\$13,434,599
Nelsonville School Commons	189 Fayette Street	Nelsonville	OH	33	LHTR	Adaptive Reuse	Family	60% AMI or less	2017	Property Management/Owner	\$9,625,209
Willow Commons	2064 Willow Street	Kendallville	IN	38	LHTR/HOME	Adaptive Reuse	Senior	60% AMI or less	2017	Property Management/Owner	\$9,472,374
Alz Place	301 E Wayne Street	Columbus	MI	42	LHTR/HOME	New construction	Senior	60% AMI or less	2017	Property Management/Owner	\$6,405,250
Wheatland Crossing	216 North Wheatland Avenue	Columbus	MI	40	LHTR	Adaptive Reuse	Family	60% AMI or less	2017	Property Management/Owner	\$8,598,499
Cavaller Greene	106 South Shawasssee Street	Corunna	MI	40	LHTR	Adaptive Reuse	Family	60% AMI or less	2017	Property Management/Owner	\$7,926,663
Tristan Ridge	175 South King Street	Eminence	KY	44	LHTR/RD 538	New construction	Senior	60% AMI or less	2017	Property Management/Owner	\$6,936,481
Ball Diamond Manor	1009 Hildesee Street	Norfolk	VA	128	LHTR/HUD	Rehabilitation	Family	60% AMI or less	2017	Property Management/Owner	\$13,857,282
Emerald Gardens	1 Claudia Court	West Hamlin	WV	41	LHTR	New construction	Family	60% AMI or less	2017	Property Management/Owner	\$8,351,990
North Avenue Gateway II	3000 W North Ave	Baltimore	MD	65	LHTR	New construction	Family	60% AMI or less	2018	Property Owner	\$17,899,815
Crystal Valley Manor	114 Kinder Drive Apt	Middlebury	IN	40	LHTR/RD515	Rehabilitation	Senior	60% AMI or less	2018	Property Management/Owner	\$5,035,294
Palladium Pointe	2627 Church Street	East Point	GA	67	LHTR	New construction	Family	60% AMI or less	2018	Property Management/Owner	\$13,409,239
Maple Hill	208 Pearl Street	Cadillac	MI	24	LHTR/RD515	Rehabilitation	Family	60% AMI or less	2018	Property Management/Owner	\$3,188,179
123 Club	123 Old Salem Road Building A	Beaufort	SC	40	LHTR	Rehabilitation	Family	60% AMI or less	2018	Property Management/Owner	\$5,247,862
Decatur Downs	407 East Edger Bergen Boulevard	Decatur	MI	48	LHTR/RD515	Rehabilitation	Family	60% AMI or less	2018	Property Management/Owner	\$5,055,520
43 Town Square	43-53 Town Square	Lima	OH	47	LHTR	Adaptive Reuse	Family	60% AMI or less	2018	Property Management/Owner	\$16,772,039
Prospect Yard	1937 Prospect Avenue	Cleveland	OH	42	LHTR	Adaptive Reuse	Family	60% AMI or less	2018	Property Management/Owner	\$12,292,519
Milan Village	71 Hurd Street	Milan	MI	36	LHTR/HUD	Rehabilitation	Senior	60% AMI or less	2018	Property Management/Owner	\$5,295,831
Fairwood Commons	1774 East Main Street	Columbus	OH	54	LHTR	New construction	Senior	60% AMI or less	2018	Property Management/Owner	\$11,584,995

Labelle Greene III	31st Street and Wood Street	WV	40	LHTC	New construction	Family	60% AMI or less	2018	Property Management/Owner	\$7,855,106
Shepard Greene	626 Shepard School Road	NC	50	LHTC	New construction	Senior	60% AMI or less	2018	Property Management/Owner	\$7,162,220
Audubon Crossing	119 Edgewood Avenue	OH	50	LHTC	New construction	Senior	60% AMI or less	2018	Property Management/Owner	\$9,933,518
Muncy Greene	291 John Brady Drive Suite 300C	PA	60	LHTC	New construction	Senior	60% AMI or less	2019	Property Management/Owner	\$14,384,169
White Oak Crossing	290 Quaker Way	TN	60	LHTC	New construction	Family	60% AMI or less	2018	Property Management/Owner	\$8,552,499
Towne Creek Crossing	13173 Service Road	KY	44	LHTC	New construction	Family	60% AMI or less	2019	Property Management/Owner	\$8,862,222
Culoden Greene	100 Ridge Run Road	WV	40	LHTC/RD515	Rehabilitation	Family	60% AMI or less	2019	Property Management/Owner	\$5,648,423
Bulder Crossing II	Martin Luther King Jr Avenue	SC	42	LHTC	New construction	Family	60% AMI or less	2019	Property Management/Owner	\$7,324,348
Freedman Point	311 East Cavson St	VA	68	LHTC	New construction	Family	60% AMI or less	2019	Property Management/Owner	\$14,428,322
Douglas Greene	3936 Snyder Rd	TN	80	LHTC	New construction	Family	60% AMI or less	2019	Property Management/Owner	\$15,909,978
Mary Harvin Center	1600 N Chester St	MD	56	LHTC	New construction	Senior	60% AMI or less	2016	Property Management/Owner	\$15,189,618
Brennan Pointe II	3150 Warwick Boulevard Apt.	VA	43	LHTC	New construction	Family	60% AMI or less	2018	Property Management/Owner	\$8,025,849
Tate Commons	2801 Neuse Boulevard	NC	68	LHTC	New construction	Family	60% AMI or less	2020	Property Management/Owner	\$10,670,148
Adair Court	806 Murphy Ave. SW #1105	GA	91	LHTC	New construction	Senior	60% AMI or less	2019	Property Management/Owner	\$15,685,498
Colonial Park	300 Mulberry Avenue I	OH		LHTC	New construction	General	60% AMI or less	2019	Property Management/Owner	\$5,988,670
Taylor Crossing	1830 Western Ave	WI	36	RD 515	Rehabilitation	General	60% AMI or less	2019	Property Management/Owner	\$7,340,764
Village Square	185 North Main Street 1	OH	30	RD 515	Rehabilitation	General	60% AMI or less	2019	Property Management/Owner	\$4,850,562
Bulder Crossing II	218 Martin Luther King Jr Avenue 141	SC	42	LHTC	New construction	General	60% AMI or less	2019	Property Management/Owner	\$8,235,152
Rooney Ridge	114 Hunting Ridge Road 101	NC	50	LHTC	New construction	Senior	60% AMI or less	2019	Property Management/Owner	\$7,443,011
Keyser Greene	Plum Swamp Road 101	WV	38	LHTC	New construction	Senior	60% AMI or less	2019	Property Management/Owner	\$7,455,035
Blackhawk Commons	309 S White Ave 101	IN	32	LHTC	Rehabilitation	Senior	60% AMI or less	2019	Property Management/Owner	\$7,389,423
The Livingston	1573 East Livingston Ave 101	OH	45	LHTC	Rehabilitation	Senior	60% AMI or less	2020	Property Management/Owner	\$10,453,929
Edinburgh Commons	204 Country Place Circle 102A	IN	24	RD 515	Rehabilitation	General	60% AMI or less	2020	Property Management/Owner	\$3,415,060
Lowcountry Crossing	490 Progressive Way # 101	SC	34	LHTC	New construction	Rehab	60% AMI or less	2020	Property Management/Owner	\$7,132,410
Barley Square Apartments	220 Grape Street 101	PA	57	LHTC	New construction	Senior	60% AMI or less	2020	Property Management/Owner	\$12,189,827
Wheatland Crossing II	220 N Wheatland Avenue Apt 101	OH	64	LHTC	New construction	General	60% AMI or less	2020	Property Management/Owner	\$14,123,725
Mulwood Greene	9 Mulwood Greene Dr.	WV	50	LHTC	Rehabilitation	General	60% AMI or less	2020	Property Management/Owner	\$7,703,989
Anderson Greene I	63 Miller Avenue SW Apt 101	IA	44	LHTC	New construction	General	60% AMI or less	2020	Property Management/Owner	\$8,799,573
Osborn Commons	215 Governor Osborn Blvd 101	MI	65	LHTC	New construction	General	60% AMI or less	2020	Property Management/Owner	\$13,933,609
Rivergate Greene	15140 Meadow Rd Apt. 101	NC	72	LHTC	New construction	General	60% AMI or less	2020	Property Management/Owner	\$13,169,020
Old Firetower Place	2204 Sunbury Way A-101	NC	60	LHTC	New construction	General	60% AMI or less	2020	Property Management/Owner	\$9,714,949
Brass Crossing II	3094 Country Circle Road	KY	37	LHTC	New construction	Senior	70% AMI or less	2020	Property Management/Owner	\$7,123,752
SevensH5 Stodling	745 Sockling Ave N.W. 101	MI	50	LHTC	New construction	General	80% AMI or less	2020	Property Management/Owner	\$10,959,260
The Hamilton	5 Carter Street 101	MI	42	LHTC	New construction	General	80% AMI or less	2020	Property Management/Owner	\$9,435,285
Stone Ridge Commons	3645 Stone Ridge Rd. 101A	PA	34	LHTC	New construction	General	80% AMI or less	2021	Property Management/Owner	\$10,354,340
Holley Pointe	622 Effingham Street 101	PA	50	LHTC	New construction	General	80% AMI or less	2021	Property Management/Owner	\$11,456,306
Kellinger Greene Commons	570 Kellinger Rd 570A	PA	56	LHTC	New construction	General	80% AMI or less	2021	Property Management/Owner	\$14,792,265
Anderson Greene II	53 Miller Avenue SW 53-101	IA	48	LHTC	New construction	General	60% AMI or less	2021	Property Management/Owner	\$9,412,034
Harbor Meadows	1425 Sherman Dr. 101	NC	60	LHTC	New construction	General	80% AMI or less	2021	Property Management/Owner	\$10,412,533
Sparrow Ridge	2375 Southpark Dr. 101	KY	96	LHTC	New construction	Senior	80% AMI or less	2021	Property Management/Owner	\$18,926,348
Hobbs Greene	3642 Jacob Street 109	WV	39	LHTC	New construction	Senior	60% AMI or less	2021	Property Management/Owner	\$8,757,043
Kirkland Terrace	100 Croft Street 101	KY	45	LHTC	New construction	Senior	60% AMI	2021	Property Management/Owner	\$7,571,584
Center Crossing	105 South Center Street 101	NC	50	LHTC	New construction	Senior	80% AMI or less	2021	Property Management/Owner	\$8,533,248
Robinson Overlook	7418 Grace Dr. 101	MD	48	LHTC	New construction	General	60% AMI or less	2021	Property Management/Owner	\$18,672,086
Nagrolls Greene	13000 Winchester Pike A001	MD	40	LHTC	New construction	Construction	60% AMI or less; Market rate	2021	Property Management/Owner	\$10,123,945
Waterman Gardens	215 E Duffy Road 1	IL	24	RD 515	Rehabilitation	Senior	60% AMI or less	2021	Property Management/Owner	\$3,267,581
Summer Tree Terrace	73 North Main Street A1	OH	24	LHTC	Rehabilitation	General	60% AMI or less	2021	Property Management/Owner	\$4,454,682
Elk Meadows	18 Elk Lane A1	TN	24	LHTC	Rehabilitation	General	60% AMI or less	2021	Property Management/Owner	\$4,332,464
Montgomery Crossing	1661 Eagle Way Suite 1003 101	OH	50	LHTC	New construction	General	70% AMI or less	2021	Property Management/Owner	\$10,033,509
Lincoln Apartments	1 Abraham Lincoln Drive	WV	32	LHTC	Rehabilitation	General	60% AMI or less	2021	Property Management/Owner	\$14,508,024
Jenkins Lofts	27 West Jenkins Avenue 103	OH	60	LHTC	New construction	General	70% AMI or less	2021	Property Management/Owner	\$17,292,756
Acheson Place Lofts	1001 Acheson Street 101	OH	80	LHTC	New construction	General	80% AMI or less	2022	Property Management/Owner	\$15,418,876
Wendler Commons	4860 Wendler Blvd 104	OH	62	LHTC	New construction	General	80% AMI or less	2022	Property Management/Owner	







**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 4 Owner Experience**

1. Owner Experience Narrative
2. Owner Experience List – Jeffrey J. Woda
3. Owner Experience List – David Cooper, Jr.
4. Woda Cooper Companies, Inc. Organizational Chart



## WODA COOPER COMPANIES

614.396.3200  
www.wodagroup.com

500 South Front St  
10th Floor  
Columbus, Ohio 43215

### Owner Experience

Woda Cooper Companies, Inc. and its affiliated companies including The Woda Group, Inc., Woda Cooper Development, Inc., Woda Construction, Inc., Woda Management & Real Estate, LLC, and Woda Cooper Communities, LLC ("Woda"), have corporate offices in Columbus, Ohio; Savannah, Georgia; Shelbyville, Kentucky; Queenstown, Maryland; Mackinaw City, Michigan; Norfolk, Virginia; Indianapolis, Indiana and Charlotte, North Carolina.

Woda is a member of the National Association of Home Builders Housing Credit Group, National Housing and Rehabilitation Association, the Affordable Housing Tax Credit Coalition, the Council for Affordable and Rural Housing, the Building Industry Association of Central Ohio, and the Michigan, Ohio, Maryland, South Carolina, Georgia, and North Carolina state affordable housing councils.

Woda has used the Low-Income Housing Tax Credit ("LIHTC") to finance over 300 affordable housing developments in fifteen states over the past 30 years.

Owners and Project Principals include:

**Jeffrey J. Woda** serves as a Director and an Officer of Woda Cooper Development, Inc., as well as a Director and Officer of Woda Cooper Companies, Inc., which owns Woda Construction, Inc., Woda Management & Real Estate, LLC, and Woda Cooper Development, Inc. Mr. Woda is involved with all aspects of development, construction and property management. Mr. Woda has been involved in the construction and housing industry for the majority of his career and was fortunate to have grown up around his family's construction business. Prior to forming Woda in 1990, Mr. Woda was employed by Ernst and Young working with construction companies, financial institutions and other corporate entities. Mr. Woda graduated from Bethany College with a B.A. in Accounting and earned his CPA certification while at Ernst & Young. Mr. Woda currently serves as a board member of the National Housing and Rehabilitation Association, a steering committee member of the Housing Credit Group of the National Association of Home Builders Association, a member of the joint Columbus and Franklin County Housing Advisory Board, and as a board member of Partners in Housing. Mr. Woda previously served on the Ohio Housing Trust Fund Advisory Committee, as a board member of the Affordable Housing Tax Credit Coalition, Benchmark Bancorp, and VisionTrust International. Mr. Woda is past president of the Council for Rural Housing and Development of Ohio and was a founding board member of the Ohio Housing Council.

**David Cooper, Jr.** serves as a Director and an Officer of Woda Cooper Development, Inc., as well as a Director and Officer of Woda Cooper Companies, Inc., which owns Woda Construction, Inc., Woda Management & Real Estate, LLC, and Woda Cooper Development, Inc. In conjunction with Jeffrey Woda, Mr. Cooper oversees day-to-day operations of Woda's business units and is involved with all aspects of each entity's operations. Mr. Cooper was previously a partner at Squire Sanders LLP, an international law firm, and the Director of Acquisitions and Corporate Counsel for Alliance Holdings, Inc., a privately held investment company. As a practicing attorney, Mr. Cooper represented syndicators, lenders, and developers in hundreds of tax credit and other affordable housing

OFFICES LOCATED IN GEORGIA, INDIANA, KENTUCKY, MARYLAND, MICHIGAN, NORTH CAROLINA, OHIO, AND VIRGINIA.

WODA COOPER COMPANIES, INC. IS AN ESOP OWNED COMPANY AND PARENT COMPANY OF WODA COOPER DEVELOPMENT, INC., WODA CONSTRUCTION, INC., AND WODA MANAGEMENT & REAL ESTATE, LLC.

transactions. Mr. Cooper received his B.A. from Wittenberg University, and his J.D. from the University of California, Hastings College of the Law. Mr. Cooper is the past chair of the Housing Credit Group of the National Association of Home Builders and has served on the boards of directors of several manufacturing, service, and financial companies, as well as serving as a trustee and officer of numerous community and charitable organizations.

Woda Cooper Companies, and its related ownership entities have entered into multiple HAP contracts in several states. There are no conflicts of interest that would be a violation of a HAP contract.

Woda Cooper Companies has no foreclosure or receivership actions, no adverse government actions or health and safety violations, nor any unresolved compliance agency audit findings.

Please find in this tab the following items demonstrating twenty or more years of owner experience: in owning affordable rental housing and developing accessible housing.

## Owner Experience

General Partner/ Member Name:	Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8609s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
					Begin	End							
	Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
	Doranne Greene-V05081	Hartford, MI	49	New Construction	10/1/2005	Still owned	11/5/2007	TC/RD 538	Yes	7/1/2008	No	No	2/3
	Hallet Crossing-W06057	Michigan Center, MI	24	New Construction	11/10/2006	Still owned	12/10/2008	TC	Yes	10/7/2010	No	No	2/3
	Hampton Pointe-V05139	Three Rivers, MI	24	New Construction	4/28/2006	Still owned	6/24/2008	TC	Yes	11/12/2009	No	No	2/3
	Patterson Crossing- T10048	Frankfort, MI	56	Acq./Rehab	9/30/2010	Still owned	9/20/2011	TC/515/Bond	Yes	8/9/2012	No	No	2/3
	Sycamore House-X07069	Durand, MI	36	Acq./Rehab	10/29/07	Still owned	12/22/2009	TC/538	Yes	12/13/2011	No	No	2/3
	Tibbit's Greene-V05082	Coldwater, MI	24	New Construction	3/25/2005	Still owned	12/21/2007	TC/RD 538	Yes	9/28/2009	No	No	2/3
	Whitman Crossing-V05080	Morenci, MI	24	New Construction	10/25/2005	Still owned	12/21/2007	TC/RD 538	Yes	12/29/2008	No	No	2/3
	Russell's Crossing- 970022	Barnesville, OH	39	New Construction	2/17/1997	Still owned	10/1/1999	TC/FHLB/AHP	Yes	3/24/2000	No	No	2/3
	Peebles Village Square-960032	Peebles, OH	30	Acq./Rehab	10/22/1996	Still owned	12/31/1997	TC/RD 515	Yes	12/31/1997	No	No	2/3
	Apple Glen- 960024	Van Wert, OH	40	Acq./Rehab	9/11/1996	Still owned	11/4/1998	TC/FHLB AHP	Yes	2/23/1999	No	No	2/3
	Summer Tree- 99-0048	Jeffersonville, OH	24	Acq./Rehab	11/18/1998	Still owned	1/4/2001	TC/RD 515	Yes	7/31/2001	No	No	2/3
	Briarwood-99-0045	Steubenville, OH	75	New Construction	2/23/1998	Still owned	12/31/2001	TC/RD 538	Yes	9/24/2002	No	No	2/3
	Stone Brooke- 98-02101 - 98-02107	Weirton, WV	42	New Construction	6/3/1998	Still owned	10/25/2000	TC	Yes	12/1/2000	No	No	2/3
	Bayberry Place- 55-0759474	Keyser, WV	65	New Construction	6/3/1998	Still owned	9/1/2000	TC	Yes	9/1/2000	No	No	2/3
	Greene Gables- 55-0759475	Short Gap, WV	50	New Construction	6/3/1998	Still owned	12/13/2000	TC	Yes	12/19/2000	No	No	2/3
	Cedar Glen- 55-0759409	Morgantown, WV	49	New Construction	10/1/1998	Still owned	10/30/2000	TC/RD 538	Yes	11/30/2000	No	No	2/3



Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 Issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Frankfort Place- 02-0046	Frankfort, OH	20	Acq./Rehab	12/10/2002	Still owned	12/31/2004	TC/M2M	Yes	11/1/2005	No	No	2/3
Heathermoor- 55-0774478	Weirton, WV	50	New Construction	7/24/2001	Still owned	12/1/2003	TC	Yes	12/19/2003	No	No	2/3
Heathermoor II	Weirton, WV	32	New Construction	6/5/2001	Still owned	12/15/2005	TC	Yes	9/24/2008	No	No	2/3
Arlington Greene- KY02-008	London, KY	40	New Construction	3/24/2003	Still owned	12/30/2004	TC/RD 538	Yes	3/3/2006	No	No	2/3
Essex Place- 00-0062	Upper Sandusky, OH	42	New Construction	2/28/2000	Still owned	4/25/2003	TC RD 538	Yes	2/5/2004	No	No	2/3
St. Clairsville Courtyard- 96-0033	St. Clairsville, OH	24	Acq./Rehab	10/16/1996	Still owned	8/28/1997	TC	Yes	3/23/1998	No	No	2/3
Ashburn Greene- 02-0039	St. Clairsville, OH	40	New Construction	11/27/2002	Still owned	12/29/2004	TC/RD 538	Yes	2/27/2006	No	No	2/3
Kensington Greene- 99-0046	Carroll County, OH	41	New Construction	5/5/1998	Still owned	12/31/2001	TC/RD 538	Yes	2/26/2003	No	No	2/3
Laurel Greene- 02-0040	Clyde, OH	40	New Construction	7/17/2003	Still owned	5/1/2003	TC/RD 538	Yes	8/29/2005	No	No	2/3
Laurelhurst- 01-0072	Clyde, OH	44	New Construction	5/14/2001	Still owned	12/31/2003	TC	Yes	7/23/2004	No	No	2/3
Victoria Place- 01-0070	Waverly, OH	30	Acq./Rehab	5/21/2001	Still owned	12/31/2003	TC/RD 515	Yes	7/8/2004	No	No	2/3
Connolly Park- 2006-430	Beaver Falls, PA	32	New Construction	10/31/06	Still owned	10/30/09	TC	Yes	6/11/2010	No	No	2/3
Madison Grove - 2006-417	Slippery Rock, PA	50	New Construction	10/5/05	Still owned	7/24/10	TC/ RD 538	Yes	3/25/2011	No	No	2/3
Ridgewood Greene- 2006-415	Reynoldsville, PA	40	Acq./Rehab	8/24/06	Still owned	11/28/08	TC/ RD 538	Yes	5/7/2010	No	No	2/3
Wesley Yard- 06-0064	Crestline, OH	46	New Construction	11/29/06	Still owned	12/15/08	TC/ RD 538	Yes	10/16/2009	No	No	2/3
Clay Meadows- 06-0134	Fayette, OH	48	Acq./Rehab	4/4/07	Still owned	10/10/08	TC/ RD 515/RD 538	Yes	3/13/2009	No	No	2/3
Norwood Greene- 06-0094	Marionetta, OH	40	New Construction	10/5/06	Still owned	11/25/08	TC	Yes	11/18/2009	No	No	2/3
Orchard Glen- 07-0106	Orville, OH	32	New Construction	11/20/07	Still owned	11/6/09	TC	Yes	9/23/2010	No	No	2/3
Ardmore Crossing- 07-0096	Chillicothe, OH	50	New Construction	11/15/07	Still owned	10/26/09	TC/ RD 538	Yes	8/17/2010	No	No	2/3
Sky Meadows- 07-0093	Cambridge, OH	40	Acq./Rehab	12/14/07	Still owned	10/26/09	TC/RD 538	Yes	9/9/2010	No	No	2/3
Woods Boardman Lake- D13030	Traverse City, MI	112	Acq./Rehab	12/30/2013	Still owned	12/30/2013	TC/RD 515/RD 538	Yes	9/13/2016	No	No	1
Lightner Greene- TC2008-642	New Castle, PA	50	New Construction	9/30/2009	Still owned	12/17/2010	TC/ HOME	Yes	8/10/2011	No	No	2/3
Leewood Place- 01-0096	Fremont, OH	40	New Construction	12/23/2002	Still owned	12/1/2003	TC/RD 538/ HOME	Yes	3/1/2005	No	No	2/3
Linden Greene- 05-0076	Jamestown, OH	38	Rehab Only	12/27/2005	Still owned	12/28/2007	TC/RD 538	Yes	12/28/2007	No	No	2/3
Livingston Greene- A10019	Fowlerville, MI	32	Acq./Rehab	3/30/2011	Still owned	8/21/2012	TC/RD 515	Yes	6/6/2013	No	No	2/3
Lockwood Greene- 05-0109	Loudonville, OH	26	New Construction	11/28/2005	Still owned	12/27/2007	TC/RD 515/RD 538	Yes	12/2/2008	No	No	2/3
Lockwood Station- 05-0109	Loudonville, OH	6	New Construction	12/21/2006	Still owned	12/27/2007	TC/RD 515/RD 538	Yes	2/17/2009	No	No	2/3
Luke's Crossing- 06-0137	Johnstown, OH	40	Acq./Rehab	2/28/2007	Still owned	11/10/2008	TC/RD 515/RD 538	Yes	1/29/2010	No	No	2/3
Lanning House- 98-0098	Dennison, OH	30	Acq./Rehab	7/1/1998	Still owned	12/30/2000	TC/HOME	Yes	6/23/2003	No	No	2/3
Mallory Meadow- 09-0145	Slippery Rock, PA	50	Acq./Rehab	12/29/2009	Still owned	8/12/2010	TC/RD 515	Yes	8/30/2011	No	No	2/3

Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Manistee Place-811012	Manistee, MI	46	Acq./Rehab	8/10/2012	Still owned	11/21/2013	TC/RD 515	Yes	9/24/2014	No	No	2/3
Mason Greene- KY-09-082	Monticello, KY	46	Acq./Rehab	7/2/2010	Still owned	6/6/2011	TC/HUD/RD 538/M2M	Yes	11/16/2011	No	No	2/3
McCalla Greene- 209061	Millan, MI	32	Acq./Rehab	12/16/2010	Still owned	11/14/2011	TC/RD 515/RD 538	Yes	6/8/2012	No	No	2/3
Meadow Glen- 02-0041	Carey, OH	50	Acq./Rehab	12/31/2004	Still owned	12/11/2002	TC/RD 515/RD 538/HOME	Yes	10/12/2006	No	No	2/3
Meridian Greene I- 03-0091	Wintersville, OH	66	New Construction	11/30/2003	Still owned	12/28/2005	TC/RD 538/HOME	Yes	3/1/2007	No	No	2/3
Meridian Greene II- 05-0080	Wintersville, OH	40	New Construction	11/27/2005	Still owned	12/27/2007	TC/RD 538/HOME	Yes	7/17/2008	No	No	2/3
Meyers Greene- TC2012-307	Corry, PA	52	Acq./Rehab	10/1/2012	Still owned	1/13/2014	TC/RD 515	Yes	3/30/2014	No	No	2/3
Moccasin Run- 09-0153	Gallon, OH	36	Acq./Rehab	12/30/2009	Still owned	11/4/2010	TC/RD 515	Yes	9/7/2011	No	No	2/3
Monarch Greene- 09-0058	Columbus, OH	44	New Construction	5/3/2010	Still owned	12/22/2011	TC/HOME	Yes	5/1/2012	No	No	2/3
Mulwood Greene-55-0774074	Romney, WV	50	New Construction	5/25/2000	Still owned	6/21/2004	TC/RD 538	Yes	12/9/2004	No	No	2/3
Nantucket Greene- 00-0060	Upper Sandusky, OH	40	New Construction	2/29/2000	Still owned	11/1/2002	TC/RD 538/HOME	Yes	5/21/2003	No	No	2/3
New Forge Crossing- TC2012-614	Waynesboro, PA	60	New Construction	12/10/2012	Still owned	6/26/2014	TC/HOME	Yes	10/28/2015	No	No	2/3
Oak Hollow- 10049	Summerville, SC	44	New Construction	4/29/2011	Still owned	5/30/2012	TC/HOME	Yes	2/8/2013	No	No	2/3
Oakmont Greene I- 34-1902592	Mt. Hope, WV	48	New Construction	5/30/2000	Still owned	10/30/2002	TC/RD 538	Yes	11/26/2002	No	No	2/3
Oakmont Greene II- 37-1477603	Mt. Hope, WV	50	New Construction	7/25/2003	Still owned	12/23/2005	TC/RD 538	Yes	12/7/2007	No	No	2/3
Olde Hickory- 08-0137	Coshocton, OH	33	New Construction	12/5/2008	Still owned	11/16/2010	TC/RD 538	Yes	3/7/2012	No	No	2/3
Olde Mill- A10095	Saugatuck, MI	24	Acq./Rehab	4/20/2012	Still owned	9/25/2012	TC/RD 515/RD 538	Yes	1/9/2014	No	No	2/3
Paigelynn Place- 03-0088	Swanton, OH	60	New Construction	5/28/2004	Still owned	12/29/2005	TC/RD 538/HOME	Yes	12/21/2007	No	No	2/3
Paint Landing- KY-05-034	Stambaugh, KY	24	New Construction	11/18/2005	Still owned	12/28/2007	TC/RD 538	Yes	6/3/2008	No	No	2/3
Paint Lick Station- KY-05-035	Stambaugh, KY	24	New Construction	11/18/2005	Still owned	12/28/2007	TC/RD 538	Yes	6/3/2008	No	No	2/3
Partridge Place- 99-0047	Pauiding, OH	42	New Construction	11/15/2000	Still owned	10/5/2001	TC	Yes	8/16/2002	No	No	2/3
Patrick Place- 03-0083	Pauiding, OH	24	Acq./Rehab	12/9/2003	Still owned	12/1/2005	TC/RD 515/HOME/FHLB	Yes	3/20/2007	No	No	2/3
Pembroke Greene- 06-0139	Lodi, OH	18	New Construction	8/24/2006	Still owned	12/12/2008	TC/RD 515/HOME	Yes	7/30/2009	No	No	2/3
Pennington Crossing- TN11-032	Johnson City, TN	42	New Construction	2/24/2012	Still owned	12/10/2013	TC	Yes	12/31/2013	No	No	2/3
Pheasant Ridge - 09-0062	McConnellsville, OH	24	New Construction	9/27/2007	Still owned	11/10/2011	TC	Yes	4/13/2012	No	No	2/3
Pinecrest Greene- 09134	Charleston, WV	46	New Construction	12/29/2009	Still owned	3/25/2011	TC	Yes	6/30/2011	No	No	2/3
Prescott Greene- IN-11-01500	Bunker Hill, IN	32	Acq./Rehab	8/16/2012	Still owned	5/29/2013	TC/RD 515	Yes	6/17/2014	No	No	2/3
Preston's Crossing- KY-08-076	Prestonburg, KY	24	New Construction	11/3/2008	Still owned	12/27/2010	TC/RD 538	Yes	5/12/2011	No	No	2/3
Providence Greene I-37-1477602	Wheeling, WV	50	New Construction	7/30/2003	Still owned	12/29/2005	TC	Yes	12/4/2007	No	No	2/3
Providence Greene II-20-1836889	Wheeling, WV	50	New Construction	4/28/2004	Still owned	11/27/2006	TC	Yes	12/3/2008	No	No	2/3



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				Begin	End							
<b>Example: ABC Apts A12345</b>	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Quail Meadows- 04-0081	Fostoria, OH	50	New Construction	11/1/2004	Still owned	12/19/2006	TC/RD 538/HOME	Yes	4/17/2007	No	No	2/3
Quaker Meadows- 2007-645	Hermitage, PA	40	New Construction	10/31/2007	Still owned	9/30/2011	TC/HOME	Yes	5/9/2012	No	No	2/3
Raceland Meadows- KY-11-013	Raceland, KY	32	Acq./Rehab	5/2/2012	Still owned	3/4/2013	TC/RD 515	Yes	6/28/2013	No	No	2/3
Raystown Crossing- 2008-643	Shippensburg, PA	50	New Construction	9/30/2009	Still owned	12/29/2010	TC/HOME	Yes	8/11/2011	No	No	2/3
Richwood Greene- 09-0063	Richwood, OH	50	Acq./Rehab	12/8/2010	Still owned	12/30/2011	TC/TCAP/1602/HUD	Yes	12/19/2012	No	No	2/3
Riverburch Greene- 02-0044	Washington Court House, OH	60	New Construction	12/5/2002	Still owned	12/29/2004	TC/RD 538/HOME	Yes	6/10/2005	No	No	2/3
Riverview Place- 01-0093	Ripley, OH	33	Acq./Rehab	12/22/2001	Still owned	12/31/2003	TC/HOME/HUD	Yes	6/10/2005	No	No	2/3
Rosewood Manor- 05-0107	Peebles, OH	24	Acq./Rehab	12/2/2005	Still owned	11/9/2007	TC/RD 515	Yes	11/9/2007	No	No	2/3
Russell's Place-04-0090	Barnsville, OH	32	New Construction	11/2/2004	Still owned	12/29/2006	TC/RD 538/HOME	Yes	6/18/2007	No	No	2/3
Yellowbud Place-55-0783585	Moorefield, WV	50	New Construction	6/28/2001	Still owned	12/8/2003	TC	Yes	12/19/2003	No	No	2/3
Sawgrass Greene- KY-03-049	Grayson, KY	54	New Construction	11/19/2003	Still owned	12/22/2005	TC/RD 538	Yes	2/8/2007	No	No	2/3
Schoenbrunn Greene- 11-0078	Sugarcreek, OH	40	Acq./Rehab	7/30/2012	Still owned	6/1/2013	TC/RD 515/HOME	Yes	1/5/2014	No	No	2/3
St. Paul Terrace-55-0752584	Parkersburg, WV	44	New Construction	9/13/1996	Still owned	12/21/1998	TC	Yes	12/21/1998	No	No	2/3
Stableford Crossing- 03-0130	West Union, OH	18	New Construction	8/9/2006	Still owned	10/2/2008	TC/RD 515/HOME	Yes	8/4/2009	No	No	2/3
Sterling Greene- TN10-005	Fayetteville, TN	48	New Construction	12/21/2010	Still owned	7/23/2012	TC/1602	Yes	12/21/2012	No	No	2/3
Stoney Ridge-01-0075	Cardiz, OH	28	New Construction	2/28/2000	Still owned	11/28/2003	TC/HOME	Yes	7/14/2004	No	No	2/3
Sustainable Fellwood II-08-059	Savannah, GA	110	New Construction	3/25/2009	Still owned	12/23/2011	TC/TCAP/HUD RHF	Yes	8/17/2012	No	No	2/3
Sustainable Fellwood III-2009-023	Savannah, GA	100	New Construction	3/25/2009	Still owned	12/27/2011	TC/TCAP/HUD RHF	Yes	11/15/2012	No	No	2/3
Tall Trees- 97-0020	Tiffin, OH	40	New Construction	11/25/1998	Still owned	11/26/1999	TC/HOME	Yes	8/22/2002	No	No	2/3
Terrapin Park- WV-15-01801	Parkersburg, WV	49	Acq./Rehab	4/27/2016	Still owned	6/15/2017	TC	Yes	11/8/2018	No	No	1
The Lofts at Court & Main-12-0105	Washington Court House, OH	31	Acq./Rehab	5/23/2012	Still owned	3/22/2013	LIHTC/HOME	Yes	7/16/2013	No	No	2/3
Harmony Greene-2010-045	Pooler, GA	50	New Construction	3/22/2011	Still owned	10/31/2012	TC	Yes	5/6/2013	No	No	2/3
Abby's Crossing - 06-0114	Bethesda, OH	42	Acq./Rehab	12/26/2006	Still owned	10/29/2008	TC/RD 515/RD 538/HOME	Yes	8/3/2009	No	No	2/3
Adow Village Square- 96-0032	Peebles, OH	30	Acq./Rehab	10/22/1996	Still owned	6/1/1997	TC	Yes	6/1/1997	No	No	2/3
Alexander Yard- 05-0106	New Lexington, OH	42	Acq./Rehab	4/13/2006	Still owned	12/14/2007	TC/RD 515/HOME	Yes	12/18/2008	No	No	2/3
Alston Park- 11-00129	Cincinnati, OH	39	Acq./Rehab	2/10/2012	Still owned	12/30/2013	TC/HOME	Yes	12/2/2015	No	No	2/3
Anderson Crossing- 10-00200	Valparaiso, IN	92	Acq./Rehab	9/30/2011	Still owned	11/13/2012	TC/RD 515	Yes	7/26/2013	No	No	2/3
Armenah Place- TC2011-636	Erie, PA	50	New Construction	9/14/2012	Still owned	12/31/2013	TC/HOME	Yes	4/10/2015	No	No	2/3
Aspen Greene- 03-0056	Byesville, OH	48	Acq./Rehab	12/9/2003	Still owned	12/31/2005	TC/RD 515/HOME	Yes	1/23/2007	No	No	2/3

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Zachary's Crossing 03-0086	Washington Courthouse, OH	40	New Construction	3/8/2005	Still owned	11/1/2005	TC/RD 538/HOME	Yes	4/10/2006	No	No	2/3
Xena Place 11-0122	McArthur, OH	40	Acq./Rehab	12/15/2011	Still owned	12/13/2012	TC/RD 515/HOME	Yes	6/3/2013	No	No	2/3
Edgefield Greene- 12025	Saluda, SC	40	New Construction	12/21/2012	Still owned	5/13/2014	TC	Yes	11/20/2014	No	No	2/3
Liberty Pointe- 2013-C-97	Petersburg, VA	50	New Construction	11/1/2013	Still owned	12/18/2015	TC	Yes	5/31/2016	No	No	1
Autumn Run- 10-0049	Millersburg, OH	38	New Construction	1/31/2011	Still owned	11/30/2012	TC/HOME	Yes	4/10/2013	No	No	2/3
Barton Greene- TN11-0113	Greenville, TN	50	New Construction	3/30/2012	Still owned	12/30/2013	TC/RD 538	Yes	6/3/2014	No	No	2/3
Beaumont Greene-05-0114	Athens, Oh	40	New Construction	11/21/2005	Still owned	12/27/2007	TC/RD 538/HOME	Yes	8/5/2008	No	No	2/3
Beaumont Place-05-0076	New Holland, OH	12	New Construction	10/18/2005	Still owned	12/28/2007	TC/RD 538/HOME	Yes	3/3/2009	No	No	2/3
Belle Prairie- 10-0056	Belpre, OH	40	Acq./Rehab	7/25/2011	Still owned	8/13/2012	TC/RD 515/HOME	Yes	1/15/2013	No	No	2/3
Braddock's Greene- 008-07001	Frostburg, MD	50	New Construction	4/15/2008	Still owned	12/31/2010	TC/RD 538	Yes	3/21/2012	No	No	2/3
Brentwood Greene- 08-00700	Kokomo, IN	60	New Construction	10/27/1997	Still owned	9/16/2010	TC/HOME	Yes	8/29/2011	No	No	2/3
Bridgeview Greene- A10091	ST. Ignace, MI	40	Acq./Rehab	4/25/2012	Still owned	12/14/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Canterbury Place-55-0783586	Elkins, WV	50	New Construction	12/13/2001	Still owned	12/13/2004	TC/RD 538	Yes	12/22/2004	No	No	2/3
Catawba Club-55-0759477	Berkeley Spring, WV	64	New Construction	6/30/1999	Still owned	12/4/2001	TC/RD 538	Yes	12/17/2001	No	No	2/3
Charters Cove- A10092	St. Ignace, MI	24	Acq./Rehab	4/25/2012	Still owned	8/30/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Chartwell Greene- 05-0109	Mount Gilead, OH	40	New Construction	11/29/2005	Still owned	11/30/2007	TC/RD 538	Yes	12/2/2008	No	No	2/3
Cheboygan Shores- A10093	Cheboygan, MI	24	Acq./Rehab	4/25/2012	Still owned	12/11/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Chelsea Greene-45-5610282	Shinnston, WV	32	Acq./Rehab	9/25/2013	Still owned	9/23/2013	TC/RD 515	Yes	5/19/2015	No	No	2/3
Chestnut Greene- KY 11-018	Corbin, KY	24	Acq./Rehab	4/17/2012	Still owned	1/31/2013	TC/RD 515	Yes	6/19/2013	No	No	2/3
City View Place- 2010-C-73	Richmond, VA	32	New Construction	2/9/2011	Still owned	10/17/2012	TC	Yes	5/28/2013	No	No	2/3
Clough Commons-11-0120	Waverly, OH	46	New Construction	12/21/2011	Still owned	11/21/2012	TC/RD 515	Yes	6/3/2013	No	No	2/3
Clover Ridge- 06-0095	McConnellsville, OH	24	New Construction	9/20/2007	Still owned	2/5/2009	TC/RD 538/HOME	Yes	11/10/2009	No	No	2/3
Colonial Park- 00-0063	Pomeroy, OH	48	Acq./Rehab	7/12/2000	Still owned	12/10/2002	TC/RD 515/HOME	Yes	9/16/2003	No	No	2/3
Coventry House- 02-0045	Tiffin, OH	30	Acq./Rehab	10/28/2002	Still owned	12/31/2004	TC/RD 538/HOME	Yes	2/7/2007	No	No	2/3
Crawford Place- 11-0121	Upper Sandusky, OH	30	Acq./Rehab	12/20/2011	Still owned	1/1/2013	TC/RD 515/HOME	Yes	6/3/2013	No	No	2/3
Crooked River- A10094	Alanson, MI	16	Acq./Rehab	4/26/2012	Still owned	12/31/2012	TC/RD 515/RD 538	Yes	1/9/2014	No	No	2/3
Crossroads Meadow- 2005-402-2007- 211	Ebensburg, PA	51	New Construction	4/6/2006	Still owned	11/19/2007	TC/RD 538	Yes	6/1/2008	No	No	2/3
Crowfield Greene- 08003	Goose Creek, SC	42	New Construction	3/23/2009	Still owned	12/29/2010	TC/HOME	Yes	2/24/2011	No	No	2/3
Cumberland Meadow- 10-09001	Cumberland, MD	64	New Construction	4/15/2010	Still owned	9/20/2011	TC	Yes	10/4/2012	No	No	2/3



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Devon House- 02-0042	Tiffin, OH	40	New Construction	2/15/2002	Still owned	12/1/2004	TC/RD 538/HOME	Yes	7/20/2005	No	No	2/3
Dutch Ridge-45-3265722	Parkersburg, WV	24	New Construction	11/29/2012	Still owned	6/30/2013	TC/RD 515	Yes	12/11/2013	No	No	2/3
Drake Crossing- 2009-305	Clarion, PA	30	Acq./Rehab	10/7/2010	Still owned	10/3/2011	TC/RD 515	Yes	9/6/2012	No	No	2/3
East Newark Homes- 05-0078	Newark, OH	40	New Construction	11/7/2007	Still owned	12/21/2007	TC/HOME	Yes	12/1/2008	No	No	2/3
Edward's Crossing I-37-1449782	Beaver, WV	44	New Construction	12/6/2002	Still owned	12/9/2004	TC	Yes	12/21/2004	No	No	2/3
Edward's Crossing II-37-1477605	Beaver, WV	44	New Construction	7/29/2003	Still owned	11/30/2005	TC	Yes	11/17/2006	No	No	2/3
Essex Place North - 01-0071	Sycamore, OH	10	New Construction	8/20/2002	Still owned	12/22/2002	TC/HOME	Yes	5/22/2003	No	No	2/3
Fairway Crossing-08-0131	Tiffin, OH	36	New Construction	10/28/2002	Still owned	5/28/2010	TC/HOME	Yes	2/4/2011	No	No	2/3
Forest Edge- 07-0103	Rawson, OH	36	New Construction	11/14/2007	Still owned	10/21/2009	TC/RD 538/HOME	Yes	8/16/2010	No	No	2/3
Fox Run- 04-0078	Piketon, OH	50	New Construction	8/13/2004	Still owned	11/22/2006	TC/RD 538/HOME	Yes	4/20/2007	No	No	2/3
Franklin's Crossing-n/a	Hilliard, OH	61	Acq./Rehab	4/21/1999	Still owned	N/A	Conv.	No	N/A	No	No	N/A
Frontier Run - 09-0146	Convoy, OH	16	Acq./Rehab	12/30/2009	Still owned	8/31/2010	TC/RD 515	Yes	9/7/2011	No	No	2/3
Columbus School- 286136900	Baltimore, MD	50	New Construction	9/14/2012	Still owned	6/20/2014	TC	Yes	11/16/2015	No	No	2/3
Gables at Countryside II-04-0077	Cadiz, OH	24	New Construction	11/3/2004	Still owned	10/5/2006	TC/RD 538	Yes	4/17/2007	No	No	2/3
Glen Abbey Crossing- KY-12-021	Dawson Spring, KY	24	Acq./Rehab	1/31/2013	Still owned	7/31/2013	TC/RD 515	Yes	1/16/2014	No	No	2/3
Glennview - 92-3057	Washington Court House, OH	56	Acq./Rehab	12/9/1991	Still owned	9/13/1993	TC/RD 538	Yes	3/2/1994	No	No	2/3
Grace Meadows- 06-0128	Jeffersonville, OH	40	Acq./Rehab	4/3/2007	Still owned	8/8/2008	TC/RD 515/HOME	Yes	7/14/2009	No	No	2/3
Green Glen I: 34-1811642	Morgantown, WV	48	New Construction	9/29/1995	Still owned	9/6/1996	TC	Yes	12/18/1996	No	No	2/3
Green Glen II-55-0752661	Morgantown, WV	36	New Construction	4/25/1996	Still owned	10/23/1998	TC	Yes	11/25/1998	No	No	2/3
Hilton North Avenue- 985011200	Baltimore, MD	64	New Construction	10/16/2013	Still owned	9/19/2013	TC	Yes	7/21/2015	No	No	2/3
Hattie Greene - 09-0047	Urbana, OH	27	New Construction	2/12/2010	Still owned	6/9/2011	TC/RD 515	Yes	5/1/2012	No	No	2/3
Hayden House- 12-0028	Springfield, OH	44	New Construction	10/31/2012	Still owned	12/31/2013	TC/HOME	Yes	9/10/2014	No	No	2/3
Heathly Crossing - 12-0029	Bidwell, OH	32	Acq./Rehab	3/1/2013	Still owned	12/31/2013	TC/RD 515/HOME	Yes	10/23/2014	No	No	2/3
Heritage Greene - 04-0080	Washington Court House, OH	50	New Construction	5/20/2005	Still owned	10/4/2006	TC/RD 538/HOME	Yes	4/20/2007	No	No	2/3
Heritage House-43-1987937	Beckley, WV	50	New Construction	12/19/2002	Still owned	12/30/2004	TC	Yes	11/15/2006	No	No	2/3
Hickory Meadow- 2005-404- 2007-210	Indiana, PA	51	New Construction	10/21/2005	Still owned	12/28/2007	TC/RD 538	Yes	6/30/2008	No	No	2/3
Honeybrook Greene- 08-0132	Utica, OH	40	New Construction	3/6/2009	Still owned	11/17/2010	TC/HOME/FHLB	Yes	3/25/2011	No	No	2/3
Ivy Glen- 00-0057	Washington Court House, OH	60	New Construction	2/28/2000	Still owned	10/31/2002	TC/RD 538/HOME	Yes	9/3/2003	No	No	2/3
Hyden Greene-46-0624258	Phillipi, WV	24	New Construction	12/23/2010	Still owned	12/23/2014	TC/RD 538	Yes	12/17/2015	No	No	2/3



Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8609s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Jacob's Crossing- 11-0048	Thurman, OH	42	Acq./Rehab	10/10/2012	Still owned	12/1/2013	TC/RD 515/HOME	Yes	4/9/2014	No	No	2/3
Jamestown Place- 01-0084	Jamestown, OH	24	Acq./Rehab	3/20/2001	Still owned	12/1/2003	TC/RD 515/HOME	Yes	9/27/2004	No	No	2/3
Jenny Greene- 08038	Hardeeville, SC	50	New Construction	12/5/2008	Still owned	12/13/2010	TC/RD 538	Yes	2/24/2011	No	No	2/3
Jeremy Park- 09-0148	Orwell, OH	36	Acq./Rehab	12/30/2009	Still owned	9/1/2010	TC/RD 515	Yes	8/31/2011	No	No	2/3
Joseph's Crossing- 55-0767951	Summersville, WV	42	New Construction	3/20/2001	Still owned	12/13/2001	TC	Yes	12/20/2001	No	No	2/3
Joshua Landing- 09-0149	Minford, OH	40	Acq./Rehab	12/31/2009	Still owned	11/1/2010	TC/RD 515	Yes	8/31/2011	No	No	2/3
Junction City- 94-4018	Junction City, OH	24	New Construction	4/19/1993	Still owned	7/17/1995	TC/RD 515	Yes	7/17/1995	No	No	2/3
Koehler Crossing- A10018	Plainwell, MI	28	Acq./Rehab	3/30/2011	Still owned	6/25/2012	TC/RD 515/RD 538	Yes	3/29/2013	No	No	2/3
Tremont Greene- 02-0037	Tiffin, OH	40	New Construction	11/15/2002	Still owned	12/28/2004	TC	Yes	9/22/2005	No	No	2/3
Troon Crossing- 04-0075	Zanesville, OH	60	New Construction	10/28/2004	Still owned	12/28/2006	TC/RD 538/HOME	Yes	4/26/2007	No	No	2/3
Ursula Park- 09-0150	Blanchester, OH	36	Acq./Rehab	12/30/2009	Still owned	10/20/2010	TC/RD 515	Yes	9/7/2011	No	No	2/3
Valley Greene- 05-0079	Barnesville, OH	24	Acq./Rehab	2/11/2011	Still owned	8/31/2007	TC/RD 515/HOME	Yes	11/19/2008	No	No	2/3
Valley View Gardens- TN-10-0148	Dunlap, TN	64	New Construction	12/10/2001	Still owned	7/30/2004	TC/RD 538	Yes	4/18/2005	No	No	2/3
Victory Place-56-2409035	Barboursville, WV	50	New Construction	11/26/2003	Still owned	12/29/2005	TC/RD 515/HOME	Yes	11/13/2007	No	No	2/3
Washington School- 12-0092	Washington Court House, OH	42	Adaptive Re-use	1/8/2013	Still owned	8/31/2014	TC	Yes	9/22/2015	No	No	2/3
Wayne Crossing 09-0068	Greenville, OH	48	Acq./Rehab	6/30/2010	Still owned	10/24/2011	TC/RD 538	Yes	3/23/2012	No	No	2/3
Webster Greene-05-0107	Peebles, OH	36	New Construction	12/2/2005	Still owned	9/1/2007	TC/RD 515	Yes	9/30/2009	No	No	2/3
Webster Glen-05-0107	Peebles, OH	12	New Construction	12/2/2005	Still owned	11/9/2007	TC/RD 538	Yes	9/30/2009	No	No	2/3
Huston Hills- 04-0074	Cambridge, OH	50	Acq./Rehab	10/28/2004	Still owned	12/29/2006	TC/RD 515	Yes	12/29/2006	No	No	2/3
Lloyd House- C12015	Menominee, MI	44	Adaptive Re-use	2/28/2013	Still owned	12/26/2013	TC/RD 538	Yes	9/15/2015	No	No	2/3/4
Brookside Commons- C12014	Traverse City, MI	72	New Construction	1/17/2014	Still owned	12/8/2015	TC/RD 538	Yes	8/29/2016	No	No	2/3/4
Wellington Place- 00-0061	Ottawa, OH	34	New Construction	8/4/2000	Still owned	12/4/2002	TC/HOME	Yes	5/19/2003	No	No	2/3
Willow Greene- 55-0767832	Bridgeport, WV	50	New Construction	6/29/1999	Still owned	12/20/2001	TC/RD 538	Yes	12/21/2001	No	No	2/3
Windjammer Greene- A10096	Munising, MI	24	Acq./Rehab	4/25/2012	Still owned	12/5/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Woda Apartments 94-5098	Powhatan Point, OH	4	Acq./Rehab	4/30/1993	Still owned	1/1/1994	TC/RD 515	Yes	1/1/1994	No	No	2/3
Wood Creek - A10097	Sault Sainte, MI	32	Acq./Rehab	4/25/2012	Still owned	12/28/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Hilton North Avenue- 985011200	Baltimore, MD	64	New Construction	10/16/2013	Still owned	9/9/2013	TC	Yes	7/25/2015	No	No	2/3/4
Penn Square- 08-11001	Baltimore, MD	79	New Construction	4/14/2011	Still owned	3/14/2011	TC	Yes	7/24/2012	No	No	2/3/4
Oak Valley Gardens- WV-12-02501	Glenville, WV	28	New Construction	12/6/2013	Still owned	12/29/2014	TC	Yes	5/19/2015	No	No	2/3
Amboy Meadows - 036704085	Amboy, IL	12	Acq./Rehab	12/15/16	Still owned		RD 515	No		No	No	N/A

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Bardolph Apts - 032562019	Bardolph, IL	8	Acq./Rehab	12/15/2016	Still owned	5/6/1996	TC/RD 515	Yes	5/6/1996	No	No	N/A
Bayberry B Apartments-098692564	Chillicothe, IL	12	Acq./Rehab	12/15/2016	Still owned	5/1/1993	TC/RD 515	Yes	5/1/1993	No	No	N/A
Beardstown Apts - 199794088	Beardstown, IL	12	Acq./Rehab	12/15/2016	Still owned	2/1/1997	TC/RD 515	Yes	2/1/1997	No	No	N/A
Blackhawk Apts - 447359840	Oregon, IL	23	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Brookwood Apts - 199794088	Matherville, IL	24	Acq./Rehab	12/15/2016	Still owned	5/1/1997	TC/RD 515	Yes	5/1/1997	No	No	N/A
Buda Apts - 495149980	Buda, IL	8	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Cambridge Apts - 358497278	Morris, IL	19	Acq./Rehab	12/15/2016	Still owned	1/14/1994	TC/RD 515	Yes	1/14/1994	No	No	N/A
Colchester Apts - 199794088	Colchester, IL	16	Acq./Rehab	12/15/2016	Still owned	3/1/1997	TC/RD 515	Yes	3/1/1997	No	No	N/A
Country Place - Argenta-86900694	Argenta, IL	12	Acq./Rehab	12/15/2016	Still owned	8/1/1989	TC/RD 515	Yes	8/1/1989	No	No	N/A
Country Place - Braidwood -044149249	Braidwood, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Country Place - Chrisman -405602410	Chrisman, IL	12	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Country Place - Coal City -169645982	Coal City, IL	24	Acq./Rehab	12/15/2016	Still owned	11/20/1992	TC/RD 515	Yes	11/20/1992	No	No	N/A
Dwight 132797635	Dwight, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Edinburgh Commons - IN-18-00500	Edinburgh, IN	24	Acq./Rehab	12/15/2016	Still owned	TBD	TC/RD 515	Yes	TBD	No	No	N/A
Louisa - 940621385	Louisa, KY	36	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Maroa - 093283360	Maroa, IL	20	Acq./Rehab	12/15/2016	Still owned	6/22/1993	TC/RD 515	Yes	6/22/1993	No	No	N/A
Moweaqua I - 249561401	Moweaqua, IL	16	Acq./Rehab	12/15/2016	Still owned	10/11/1989	TC/RD 515	Yes	10/11/1989	No	No	N/A
Moweaqua II - 183490680	Moweaqua, IL	16	Acq./Rehab	12/15/2016	Still owned	5/4/1993	TC/RD 515	Yes	5/4/1993	No	No	N/A
Olney - 152349215	Olney, IL	16	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Ottawa - 340418704	Ottawa, IL	24	Acq./Rehab	12/15/2016	Still owned	7/15/1989	TC/RD 515	Yes	7/15/1989	No	No	N/A
Plymouth - 087024614	Plymouth, IN	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Portland II - 39287979	Portland, IN	20	Acq./Rehab	12/15/2016	Still owned	2/1/1992	TC/RD 515	Yes	2/1/1992	No	No	N/A
Scottsville - 75471250	Scottsville, KY	43	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Vandalia - 194368407	Vandalia, IL	32	Acq./Rehab	12/15/2016	Still owned	11/10/1994	TC/RD 515	Yes	11/10/1994	No	No	N/A
Villa Grove - 396273361	Villa Grove, IL	23	Acq./Rehab	12/15/2016	Still owned	7/13/1994	TC/RD 515	Yes	7/13/1994	No	No	N/A
Portland I - 185833022	Portland, IN	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Deer Run Apts - 465931213	Piano, IL	18	Acq./Rehab	12/15/2016	Still owned	2/10/1992	TC/RD 515	Yes	2/10/1992	No	No	N/A
Eureka Woodridge Apts - 72356803	Eureka, IL	20	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Kreider Commons - TC2014-419	Lebanon, PA	50	Adaptive Re-use	2/19/2014	Still owned	7/29/2016	TC	Yes	7/29/2016	No	No	N/A
Gracefield Apts - 789425540	Ottawa, IL	24	Acq./Rehab	12/15/2016	Still owned	1/1/2005	TC/RD 515	Yes	1/1/2005	No	No	N/A



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Heather Apts - 199794088	Spring Valley, IL	24	Acq./Rehab	12/15/2016	Still owned	6/9/1997	TC/RD 515	Yes	6/9/1997	No	No	N/A
Highland Meadows - 077818362	Lanark, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Highlands Oglesby Apts - 64360735	Oglesby, IL	24	Acq./Rehab	12/15/2016	Still owned	8/23/1999	TC/RD 515	Yes	8/23/1999	No	No	N/A
Kingsfield Apts - 083643036	Plano, IL	16	Acq./Rehab	12/15/2016	Still owned	7/1/2002	TC/RD 515	Yes	7/1/2002	No	No	N/A
Lake Matherville Manor - 408904498	Matherville, IL	40	Acq./Rehab	12/15/2016	Still owned	5/19/2011	TC/RD 515	Yes	5/19/2011	No	No	N/A
Lincoln Northside Apts - 332732378	Lincoln, IL	24	Acq./Rehab	12/15/2016	Still owned	11/1/1996	TC/RD 515	Yes	11/1/1996	No	No	N/A
Lincoln Village - 266250020	Lincoln, IL	40	Acq./Rehab	12/15/2016	Still owned	7/1/1990	TC/RD 515	Yes	7/1/1990	No	No	N/A
Meadows Apts - 58875282	Coal City, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Monmouth Manor - 159252235	Monmouth, IL	32	Acq./Rehab	12/15/2016	Still owned	7/1/2002	TC/RD 515	Yes	7/1/2002	No	No	N/A
Parkview Apartments 338863862	Huntley, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Parkway Apartments - 367584565	Parkway, IL	24	Acq./Rehab	12/15/2016	Still owned	4/20/2001	TC/RD 515	Yes	4/20/2001	No	No	N/A
Northpointe Apts - 155559106	Pontiac, IL	20	Acq./Rehab	12/15/2016	Still owned	8/17/1999	TC/RD 515	Yes	8/17/1999	No	No	N/A
Edgefield Apts 155559106	Pontiac, IL	16	Acq./Rehab	12/15/2016	Still owned	2/1/1999	TC/RD 515	Yes	2/1/1999	No	No	N/A
Shumway Apts - 155559106	Taylorville, IL	24	Acq./Rehab	12/15/2016	Still owned	6/1/1999	TC/RD 515	Yes	6/1/1999	No	No	N/A
Streator Manor - 211955127	Streator, IL	32	Acq./Rehab	12/15/2016	Still owned	12/31/1989	TC/RD 515	Yes	12/31/1989	No	No	N/A
Sycamore Meadows - 896308742	Sycamore, IL	24	Acq./Rehab	12/15/2016	Still owned	N/A	RD 515	No	N/A	No	No	N/A
Viriden Apartments - 444517343	Viriden, IL	16	Acq./Rehab	12/15/2016	Still owned	5/1/1996	TC/RD 515	Yes	5/1/1996	No	No	N/A
Waterman Gardens - 11571	Waterman, IL	24	Acq./Rehab	12/15/2016	Still owned	TBD	RD 515	No	TBD	No	No	TBD
Westridge Apts - FTC 11444	Mendota, IL	24	Acq./Rehab	11/14/2018	Still owned	TBD	TC/RD 515/RD 538	Yes	TBD	No	No	N/A
Woodview Apartments I - 098692564	Glasford, IL	20	Acq./Rehab	12/15/2016	Still owned	5/1/1993	TC/RD 515	Yes	5/1/1993	No	No	N/A
Woodview Apartments II - 098692564	Glasford, IL	4	Acq./Rehab	12/15/2016	Still owned	10/1/1992	TC/RD 515	Yes	10/1/1992	No	No	N/A
Greensburgh Manor - 14-0107	Green, OH	50	New Construction	11/5/2016	Still owned	10/27/2016	TC	Yes	10/27/2016	No	No	2/3/4
Willoughbeach Terrace - OH-140097	Willowick, OH	50	New Construction	12/19/2014	Still owned	9/30/2016	TC/HDAP/FAF	Yes	9/30/2016	No	No	2/3/4
Fayette Landing - OH-14-0080	Washington Courthouse, OH	36	Acq./Rehab	11/30/2016	Still owned	11/30/2016	TC/HDAP/AHP	Yes	2/2/2018	No	No	1
Everts Hill - OH-15-0016	Cirdeville, OH	49	Acq./Rehab	3/25/2016	Still owned	12/27/2017	TC	Yes	1/17/2019	No	No	1
Prospect Yard - OH-16-0214	Cleveland, OH	50	Adaptive Re-use	12/31/2014	Still owned	12/30/2019	TC	Yes	7/17/2020	No	No	1
Audubon Crossing - OH-16-0211	Dayton, OH	50	New Construction	8/3/2017	Still owned	10/31/2018	TC	Yes	9/5/2019	No	No	1
Fairwood Commons - OH-16-0081	Columbus, OH	54	New Construction	9/30/2016	Still owned	10/31/2018	TC	Yes	9/5/2019	No	No	1
1573 East Livingston - 17-0081	Columbus, OH	45	New Construction	4/20/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Oliver Crossing - TN14-059	Linden, TN	24	New Construction	1/29/2015	Still owned	11/21/2016	TC	Yes	1/26/2017	No	No	1

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
White Oak Crossing- TN16-061	Knoxville, TN	60	New Construction	12/5/2017	Still owned	12/28/2018	TC	Yes	11/26/2019	No	No	1
Keyser Greene - WV-17-00501	Keyser, WV	38	New Construction	5/1/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Culloden Greene - WV-17-02401	Culloden, WV	40	Rehab Only	7/25/2018	Still owned	9/25/2019	TC/RD 515	Yes	12/22/2020	No	No	1
LaBelle Greene III- WV-16-01101	Wheeling, WV	40	New Construction	7/7/2017	Still owned	10/9/2018	TC	Yes	11/19/2019	No	No	1
Terrapin Park Assoc - WV-15-01806	Parkersburg, WV	49	Rehab Only	4/25/2016	Still owned	6/15/2017	TC	Yes	11/8/2018	No	No	1
Emerald Gardens-WV-15-03301	West Hamlin, WV	42	New Construction	11/18/2016	Still owned	12/15/2017	TC	Yes	11/30/2018	No	No	1
LaBelle Greene- WV-14-01905	Wheeling, WV	40	New Construction	5/1/2015	Still owned	12/29/2016	TC	Yes	11/20/2017	No	No	1
Towne Creek Crossing-KY-17-013	Walton, KY	44	New Construction	12/12/2017	Still owned	9/6/2019	TC/RD 538	Yes	6/3/2020	No	No	1
Tristan Ridge- KY-16-025	Eminence, KY	44	New Construction	10/25/2016	Still owned	12/22/2017	TC	Yes	6/25/2018	No	No	1
Breas Crossing- KY-15-013	Shelbyville, KY	44	New Construction	7/28/2015	Still owned	10/27/2016	TC/RD 538	Yes	4/17/2017	No	No	2/3/4
Pebblecreek Crossing- KY- 15-018	Richmond, KY	48	New Construction	10/19/2015	Still owned	2/6/2017	TC	Yes	6/13/2017	No	No	2/3/4
Willow Commons- TC 2015-614	Wesleyville, PA	45	Adaptive Re-use	11/16/2014	Still owned	12/28/2017	TC	Yes	3/2/2020	No	No	1
Muncy Greene- TC2017-412	Muncy, PA	60	New Construction	12/28/2016	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Allegany Junction- MD-18-04001	Frostburg, MD	40	New Construction	6/26/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Magnolia Greene- MD-18-07001	La Vale, MD	40	New Construction	8/27/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Nelsonville School Commons- 15-0109	Nelsonville, OH	33	Adaptive Re-use	1/20/2016	Still owned	12/5/2017	TC	Yes	11/9/2018	No	No	1
North Avenue Gateway II- MD-16-10001	Baltimore, MD	65	New Construction	10/16/2013	Still owned	7/11/2018	TC	Yes	4/23/2019	No	No	1
Freedman Point-2017-C-129	Hopewell, VA	68	New Construction	5/30/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Brennan Pointe II- 2016-C-102	Newport News, VA	44	New Construction	7/6/2017	Still owned	10/31/2018	TC	Yes	6/21/2019	No	No	1
Woda Bell Diamond Manor-2015-C-104	Norfolk, VA	128	New Construction	12/1/2016	Still owned	12/6/2016	TC	Yes	7/29/2019	No	No	1
Bailey Court- 2014-C-91	Stanardsville, VA	32	Rehab Only	12/15/2015	Still owned	12/27/2016	TC/RD 515/RD 538	Yes	4/12/2018	No	No	1
Brennan Pointe- 2014-C-79	Newport News, VA	44	New Construction	3/11/2015	Still owned	12/31/2016	TC	Yes	12/20/2017	No	No	2/3/4
The Banks at Berkley- 2014-C-83	Norfolk, VA	50	New Construction	12/10/2015	Still owned	12/31/2016	TC	Yes	2/8/2018	No	No	2/3/4
ATZ Place- 2016a-c-003	Kendallville, IN	38	New Construction	9/7/2016	Still owned	9/27/2017	TC	Yes	8/16/2018	No	No	2/3/4
Crystal Valley Manor- IN-16-0400	Middlebury, IN	40	Acq./Rehab	9/1/2017	Still owned	9/24/2018	TC/RD 515/Dev. Fund	Yes	5/3/2019	No	No	1
Silver Lakes- GA-15-21401	Madison, GA	44	New Construction	8/11/2015	Still owned	9/9/2016	TC	Yes	9/14/2017	No	No	2/3/4
Shepard Greene- 16-0149	Zebulon, NC	50	New Construction	12/29/2016	Still owned	12/28/2018	TC	Yes	10/17/2019	No	No	1/4
Ravenwood Crossing- 16-14001	Rocky Mount, NC	80	New Construction	6/1/2017	Still owned	10/7/2019	TC	Yes	8/6/2020	No	No	1/4
Butler Crossing- 14009	Kingstree, SC	40	New Construction	2/9/2015	Still owned	3/31/2016	TC	Yes	11/17/2016	No	No	2/3/4
123 Club- 17009	Beaufort, SC	40	Rehab Only	5/29/2018	Still owned	7/31/2019	TC	Yes	2/27/2020	No	No	TBD



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Parrish Greene- 15039	Estill, SC	28	New Construction	9/4/2015	Still owned	7/28/2017	TC	Yes	2/9/2018	No	No	1
Butler Crossing II- 17008	Kingstree, SC	42	New Construction	5/22/2018	Still owned	7/8/2019	TC	Yes	2/27/2020	No	No	TBD
Maple Hill Apartments- G16077	Cadillac, MI	24	Acq./Rehab	4/26/2018	Still owned	TBD	TC/RD 515/538	Yes	TBD	No	No	TBD
Woda Decatur Downs- G16040	Decatur, MI	48	Acq./Rehab	8/24/2017	Still owned	12/15/2018	TC/RD 515/538	Yes	9/3/2020	No	No	1
Woda Lawrence Downs- G16042	Lawrence, MI	48	Acq./Rehab	8/24/2017	Still owned	10/18/2018	TC/RD 515/538	Yes	9/3/2020	No	No	1
Grand View Place- F15025	Grand Rapids, MI	68	New Construction	10/12/2016	Still owned	12/29/2017	TC	Yes	11/7/2019	No	No	1
Cavalier Greene- F15024	Corunna, MI	40	Mixed	6/3/2016	Still owned	12/8/2017	TC	Yes	4/18/2019	No	No	1
Portland School- F15026	Portland, MI	29	Adaptive Re-use	1/21/2016	Still owned	12/27/2017	TC	Yes	7/2/2019	No	No	1
Enchanted Glen- E14021	Colon, MI	36	Rehab Only	2/3/2016	Still owned	2/7/2017	TC/ RD 515/538	Yes	5/21/2018	No	No	1
Lincoln House- E14020	Owosso, MI	28	Adaptive Re-use	7/31/2015	Still owned	12/19/2017	TC/ RD 538	Yes	TBD	No	No	TBD
Hawatha Apartments- D13068	Iron River, MI	32	Rehab Only	1/16/2015	Still owned	12/23/2015	TC/ RD 515/538	Yes	12/23/2015	No	No	2/3
Adair Court- 2016-034	Atlanta, GA	91	New Construction	4/19/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Mallalieu Pointe- 2015-024	East Point, GA	67	New Construction	12/21/2016	Still owned	3/30/2018	TC	Yes	3/7/2019	No	No	1/4
Blackhawk Commons- IN-17-03600	Sheridan, IN	32	Adaptive Re-use	11/26/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Penn Square II- MD-13-01001	Baltimore, MD	61	New Construction	1/10/2013	Still owned	10/9/2015	TC	Yes	8/5/2016	No	No	1/4
Rooney Ridge-NC-17-04001	Roanoke Rapids, NC	50	New Construction	5/8/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Seven45 Stocking- H17032	Grand Rapids, MI	50	New Construction	5/10/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Thompson Greene-O-1289	Butler Twp., PA	50	New Construction	6/23/2014	Still owned	9/28/2016	TC	Yes	8/23/2018	No	No	1/4
Wheatland Crossing-14-0145	Columbus, OH	42	New Construction	7/15/2015	Still owned	11/9/2017	TC	Yes	11/9/2018	No	No	1/4
Woda Milan Village- H-17033	Milan, MI	36	Acq./Rehab	7/12/2018	Still owned	TBD	TC/ RD 538	Yes	TBD	No	No	TBD
Seaborn Greene- 13018	Bamberg, SC	40	New Construction	9/26/2014	Still owned	6/26/2015	TC	Yes	12/7/2015	No	No	2/3
Majors Crossing- 130052	Rock Creek, OH	40	New Construction	11/25/2013	Still owned	11/23/2015	TC	Yes	6/29/2016	No	No	2/3
Northside Drive Apartments-TN13-117	Crossville, TN	40	New Construction	8/24/2014	Still owned	9/18/2015	TC	Yes	12/21/2015	No	No	2/3
Capital Greene-WV-13-01401	Wheeling, WV	40	New Construction	11/18/2014	Still owned	10/30/2015	TC	Yes	12/21/2016	No	No	2/3/4
Tooley Place- 9152473	Elizabeth City, NC	36	New Construction	12/30/2013	Still owned	9/11/2015	TC	Yes	6/2/2016	No	No	2/3
Viewmont Square Court-9150948	Hickory, NC	50	New Construction	7/30/2014	Still owned	12/30/2015	TC	Yes	5/13/2016	No	No	2/3/4
McCormick Greene- WV-14-02201	Sistersville, WV	24	New Construction	8/21/2014	Still owned	9/20/2016	TC	Yes	11/3/2017	No	No	2/3/4
Woodyard Greene- WV-14-02001	Elizabeth, WV	30	New Construction	8/21/2014	Still owned	8/24/2016	TC/RD 538	Yes	12/14/2017	No	No	2/3/4
Pringle House- WV-13-01501	Buckhannon, WV	40	New Construction	10/31/2014	Still owned	9/16/2015	TC/RD 538	Yes	12/21/2016	No	No	2/3/4
Bayridge Greene- WV-13-01301	Keyser, WV	40	New Construction	8/2/2013	Still owned	8/25/2015	TC	Yes	12/21/2016	No	No	2/3/4



Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D. #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months? **	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Dawn Ridge- TC2013-472	Carle, PA	58	New Construction	7/11/2013	Still owned	12/18/2015	TC	Yes	10/26/2017	No	No	2/3/4
Mary Harvin Center- MD-13-04001	Baltimore, MD	61	New Construction	2/1/2013	Still owned	1/20/2016	TC	Yes	5/11/2017	No	No	2/3/4
Boytown Village- 13-051	Atlanta, GA	43	Rehab Only	1/5/2014	Still owned	10/15/2015	TC	Yes	7/11/2016	No	No	2/3/4
Anderson Greene-18-19	Cedar Rapids, IA	44	New Construction	3/18/2019	Still owned	TBD	TC/Trust Funds	Yes	TBD	No	No	TBD
Wendler Crossing- 18-0072	Columbus, OH	62	New Construction	12/10/2019	Still owned	TBD	TC/City HOME/AHT	Yes	TBD	No	No	TBD
Wheatland Crossing II- 18-0070	Columbus, OH	64	New Construction	9/9/2019	Still owned	TBD	TC/HDAP/City HOME/AHT	Yes	TBD	No	No	TBD
Douglas Greene- TN17-034	Servierville, TN	80	New Construction	7/10/2018	Still owned	TBD	TC/RD 538	Yes	TBD	No	No	TBD
Stevenson Square- TN18-026	Decatur, TN	24	New Construction	9/16/2019	Still owned	TBD	TC/RD 515	Yes	TBD	No	No	TBD
Blue Ridge- TN18-025	Benton, TN	48	Acq./Rehab	9/12/2019	Still owned	TBD	TC/ RD 515	Yes	TBD	No	No	TBD
LaBelle Greene II- WV-18-01201	Wheeling, WV	40	New Construction	6/10/2019	Still owned	TBD	TC/HOME/Trust Funds	Yes	TBD	No	No	TBD
Simons Crossing- TBD	Clarksburg, WV	38	New Construction	4/11/2019	Still owned	TBD	TC/RD 538	Yes	TBD	No	No	TBD
McCormick Crossing- TBD	Sistersville, WV	48	Acq./Rehab	10/1/2020	Still owned	TBD	TC/HOME/Trust Funds/RD 515 and 538	Yes	TBD	No	No	TBD
Kirkman Terrace- KY-18-008	Hopkinsville, KY	45	New Construction	2/21/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Stone Ridge Commons- TC2018-429	York, PA	34	New Construction	1/15/2019	Still owned	TBD	TC/PHARE/HOME	Yes	TBD	No	No	TBD
Barley Square- TC2018-431	Reading, PA	57	New Construction	12/3/2018	Still owned	TBD	TC/HOME/ISRP	Yes	TBD	No	No	TBD
Brock Bridge Landing- MD-19-08001	Jessup, MD	38	New Construction	10/11/2019	Still owned	TBD	TC/RHPP	Yes	TBD	No	No	TBD
Robinson Overlook- TBD	Columbia, MD	48	New Construction	11/29/2019	Still owned	TBD	TC/RHPP	Yes	TBD	No	No	TBD
Old Firetower Place- 18-0085	Greenville, NC	60	New Construction	2/14/2019	Still owned	TBD	TC/RPP/WHLP	Yes	TBD	No	No	TBD
Rivergate Greene- 18-0083	Charlotte, NC	72	New Construction	7/8/2019	Still owned	TBD	TC/Charlotte HTF/WHLP	Yes	TBD	No	No	TBD
Tate Commons- 17-0057	New Bern, NC	68	New Construction	1/3/2018	Still owned	TBD	TC/WHLP	Yes	TBD	No	No	TBD
WC Lowcountry Crossing-18026	Denmark, SC	34	New Construction	5/16/2019	Still owned	TBD	TC/HOME	Yes	TBD	No	No	TBD
The Hamilton- 118025	Pontiac, MI	42	New Construction	3/28/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Osborn Commons 118026	Sault Sainte Marie, MI	65	New Construction	1/2/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Perkins Field- 2018-044	Warner Robins, GA	90	New Construction	TBD	TBD	TBD	TC/JAD Grant	Yes	TBD	No	No	TBD
Jenkins Street Lofts- 19-0050	Columbus, OH	60	New Construction	3/18/2020	Still owned	TBD	TC/HOME	Yes	TBD	No	No	TBD
Montgomery Crossing- 19-0051	Ashland, OH	50	New Construction	7/15/2019	Still owned	TBD	TC/HDAP	Yes	TBD	No	No	TBD
Atcheson Place Lofts- 19-0228	Columbus, OH	80	New Construction	1/14/2020	Still owned	TBD	TC/HDAP	Yes	TBD	No	No	TBD
WC Elk Meadows- TN19-035	Coalmont, TN	24	Acq./Rehab	11/20/2020	Still owned	TBD	TC/RD 515/538	Yes	TBD	No	No	TBD
WC Woodbury Crossing- TN19-036	Corryton, TN	80	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Carnegie Greene 37- TBD	Wheeling, WV	39	New Construction	7/13/2020	Still owned	TBD	TC/HOME	Yes	TBD	No	No	TBD

Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 Issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?***	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
WC Muirwood Greene- TBD	Romney, WV	50	Acq./Rehab	8/24/2020	Still owned	TBD	TC/RD 515/538	Yes	TBD	No	No	TBD
Kellinger Greene- TC2019-442	York, PA	56	New Construction	6/25/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Breas Crossing II- KY-19-004	Shelbyville, KY	37	New Construction	9/10/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Millersview Crossing- MD-21-04001 to 04054	Millersview, MD	54	New Construction	3/18/2020	Still owned	TBD	TC/RHPP	Yes	TBD	No	No	TBD
Holley Pointe-2019-C-96	Portsmouth, VA	50	New Construction	6/1/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Center Crossing- 19-0046	Hickory, NC	50	New Construction	6/5/2020	Still owned	TBD	TC/RPP/WHLHP/HOME	Yes	TBD	No	No	TBD
Harbor Meadows -19-0181	Calabash, NC	60	New Construction	12/20/2019	Still owned	TBD	TC/RPP	Yes	TBD	No	No	TBD
Winston Commons- 119037	Pontiac, MI	54	New Construction	12/20/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
WC Maple Leaf Townhomes- 6466	Green Bay, WI	36	Acq./Rehab	4/25/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
WC Oak Ridge- 6456	Adams, WI	24	Acq./Rehab	12/16/2019	Still owned	TBD	TC/PRLP/RD 515	Yes	TBD	No	No	TBD
Anderson Greene II - 19-12	Cedar Rapids, IA	48	New Construction	3/16/2020	Still owned	TBD	TC/HTF	Yes	TBD	No	No	TBD
43 Town Square - 16-0098	Lima, OH	47	Adaptive Re-use	10/5/2017	Still owned	12/28/2018	TC/HOME	Yes	2/14/2020	No	No	TBD
Sparrow Ridge- KY-20-010	Hebron, KY	96	New Construction	11/9/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Harper's Crossing - IN-20-00800	Plainfield, IN	60	New Construction	10/22/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Proctor Place- IN-20-01600	Indianapolis, IN	61	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Canaan Crossing- 2019-058	Madison, GA	60	New Construction	TBD	TBD	TBD	TC/HOME	Yes	TBD	No	No	TBD
Stanton Park Apts- 2019-552	Atlanta, GA	56	New Construction	TBD	TBD	TBD	TC/HOME/BeitLine/Hom eFirst	Yes	TBD	No	No	TBD
McKay Manor- FTC 11849	Breese, IL	58	New Construction	TBD	TBD	TBD	TC/IHDA	Yes	TBD	No	No	TBD
Parker Glen- FTC 11847	Champaign, IL	64	New Construction	TBD	TBD	TBD	TC/IHDA	Yes	TBD	No	No	TBD
Chandler Pointe- 20-18	Wilton, IA	35	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Johnston Crossing- 20-27	Johnston, IA	50	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Williams Terrace- 20-19	Indianola, IA	50	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Haven Crossing- KY-21-011	Walton, KY	57	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Landon Greene- NC-20-06001	Statesville, NC	60	New Construction	TBD	TBD	TBD	TC/RPP	Yes	TBD	No	No	TBD
Northlake Center Apts- NC-20-06501	Charlotte, NC	78	New Construction	TBD	TBD	TBD	TC/RPP	Yes	TBD	No	No	TBD
Kershaw Greene- 20-0089	Athens, OH	51	New Construction	TBD	TBD	TBD	TC/OHFA	Yes	TBD	No	No	TBD
Tyler Park- 20-0088	Athens, OH	56	New Construction	TBD	TBD	TBD	TC/OHFA	Yes	TBD	No	No	TBD
Lockbourne Greene- TBD	Columbus, OH	60	New Construction	TBD	TBD	TBD	TC/HNHF	Yes	TBD	No	No	TBD
Dumbury Greene- TBD	Prairie Twp., OH	60	New Construction	TBD	TBD	TBD	TC/HADP/County Loan	Yes	TBD	No	No	TBD





# Owner Experience

General Partner/ Member Name:	David Cooper, Jr., Authorized Member of Sole Member of General Partner												
Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?	
				Begin	End								
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3	
Doranne Greene-V05081	Hartford, MI	49	New Construction	10/1/2005	Still owned	11/5/2007	TC/RD 538	Yes	7/1/2008	No	No	2/3	
Hallet Crossing-W06057	Michigan Center, MI	24	New Construction	11/10/2006	Still owned	12/10/2008	TC	Yes	10/7/2010	No	No	2/3	
Hampton Pointe-V05139	Three Rivers, MI	24	New Construction	4/28/2006	Still owned	6/24/2008	TC	Yes	11/12/2009	No	No	2/3	
Patterson Crossing- T10048	Frankfort, MI	56	Acq./Rehab	9/30/2010	Still owned	9/20/2011	TC/515/Bond	Yes	8/9/2012	No	No	2/3	
Sycamore House-X07069	Durand, MI	36	Acq./Rehab	10/29/07	Still owned	12/22/2009	TC/538	Yes	12/13/2011	No	No	2/3	
Tibbit's Greene-V05082	Coldwater, MI	24	New Construction	3/25/2005	Still owned	12/21/2007	TC/RD 538	Yes	9/28/2009	No	No	2/3	
Whitman Crossing-V05080	Morenci, MI	24	New Construction	10/25/2005	Still owned	12/21/2007	TC/RD 538	Yes	12/29/2008	No	No	2/3	
Russell's Crossing- 970022	Barnesville, OH	39	New Construction	2/17/1997	Still owned	10/1/1999	TC/FHLB/AHP	Yes	3/24/2000	No	No	2/3	
Peebles Village Square-960032	Peebles, OH	30	Acq./Rehab	10/22/1996	Still owned	12/31/1997	TC/RD 515	Yes	12/31/1997	No	No	2/3	
Apple Glen- 960024	Van Wert, OH	40	Acq./Rehab	9/11/1996	Still owned	11/4/1998	TC/FHLB AHP	Yes	2/23/1999	No	No	2/3	
Summer Tree- 99-0048	Jeffersonville, OH	24	Acq./Rehab	11/18/1998	Still owned	1/4/2001	TC/RD 515	Yes	7/31/2001	No	No	2/3	
Briarwood-99-0045	Steubenville, OH	75	New Construction	2/23/1998	Still owned	12/31/2001	TC/RD 538	Yes	9/24/2002	No	No	2/3	
Stone Brooke- 98-02101 – 98-02107	Weirton, WV	42	New Construction	6/3/1998	Still owned	10/25/2000	TC	Yes	12/1/2000	No	No	2/3	
Bayberry Place- 55-0759474	Keyser, WV	65	New Construction	6/3/1998	Still owned	9/1/2000	TC	Yes	9/1/2000	No	No	2/3	
Greene Gables- 55-0759475	Short Gap, WV	50	New Construction	6/3/1998	Still owned	12/13/2000	TC	Yes	12/19/2000	No	No	2/3	
Cedar Glen- 55-0759409	Morgantown, WV	49	New Construction	10/1/1998	Still owned	10/30/2000	TC/RD 538	Yes	11/30/2000	No	No	2/3	



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Frankfort Place- 02-0046	Frankfort, OH	20	Acq./Rehab	12/10/2002	Still owned	12/31/2004	TC/M2M	Yes	11/1/2005	No	No	2/3
Heathermoor- 55-0774478	Weirton, WV	50	New Construction	7/24/2001	Still owned	12/4/2003	TC	Yes	12/19/2003	No	No	2/3
Heathermoor II	Weirton, WV	32	New Construction	6/5/2001	Still owned	12/15/2005	TC	Yes	9/24/2008	No	No	2/3
Arlington Greene- KY02-008	London, KY	40	New Construction	3/24/2003	Still owned	12/30/2004	TC/RD 538	Yes	3/3/2006	No	No	2/3
Essex Place- 00-0062	Upper Sandusky, OH	42	New Construction	2/28/2000	Still owned	4/25/2003	TC RD 538	Yes	2/5/2004	No	No	2/3
St. Clairsville Courtyard- 96-0033	St. Clairsville, OH	24	Acq./Rehab	10/16/1996	Still owned	8/28/1997	TC	Yes	3/23/1998	No	No	2/3
Ashburn Greene- 02-0039	St. Clairsville, OH	40	New Construction	11/27/2002	Still owned	12/29/2004	TC/RD 538	Yes	2/27/2006	No	No	2/3
Kensington Greene- 99-0046	Carroll County, OH	41	New Construction	5/5/1998	Still owned	12/31/2001	TC/RD 538	Yes	2/26/2003	No	No	2/3
Laurel Greene- 02-0040	Clyde, OH	40	New Construction	7/17/2003	Still owned	5/1/2003	TC/RD 538	Yes	8/29/2005	No	No	2/3
Laurelhurst- 01-0072	Clyde, OH	44	New Construction	5/14/2001	Still owned	12/31/2003	TC	Yes	7/23/2004	No	No	2/3
Victoria Place- 01-0070	Waverly, OH	30	Acq./Rehab	5/21/2001	Still owned	12/31/2003	TC/RD 515	Yes	7/8/2004	No	No	2/3
Connolly Park- 2006-430	Beaver Falls, PA	32	New Construction	10/31/06	Still owned	10/30/09	TC	Yes	6/11/2010	No	No	2/3
Madison Grove - 2006-417	Slippery Rock, PA	50	New Construction	10/5/05	Still owned	7/24/10	TC/ RD 538	Yes	3/25/2011	No	No	2/3
Ridgewood Greene- 2006-415	Reynoldsville, PA	40	Acq./Rehab	8/24/06	Still owned	11/28/08	TC/ RD 538	Yes	5/7/2010	No	No	2/3
Wesley Yard- 06-0064	Crestline, OH	46	New Construction	11/29/06	Still owned	12/15/08	TC/ RD 538	Yes	10/16/2009	No	No	2/3
Clay Meadows- 06-0134	Fayette, OH	48	Acq./Rehab	4/4/07	Still owned	10/10/08	TC/ RD 515/RD 538	Yes	3/13/2009	No	No	2/3
Norwood Greene- 06-0094	Marietta, OH	40	New Construction	10/5/06	Still owned	11/25/08	TC	Yes	11/18/2009	No	No	2/3
Orchard Glen- 07-0106	Orville, OH	32	New Construction	11/20/07	Still owned	11/6/09	TC	Yes	9/23/2010	No	No	2/3
Ardmore Crossing- 07-0096	Chillicothe, OH	50	New Construction	11/15/07	Still owned	10/26/09	TC/ RD 538	Yes	8/17/2010	No	No	2/3
Sky Meadows- 07-0093	Cambridge, OH	40	Acq./Rehab	12/14/07	Still owned	10/26/09	TC/RD 538	Yes	9/9/2010	No	No	2/3
Woda Boardman Lake- D13030	Traverse City, MI	112	Acq./Rehab	12/30/2013	Still owned	12/30/2013	TC/RD 515/RD 538	Yes	9/13/2016	No	No	1
Lightner Greene- TC2008-642	New Castle, PA	50	New Construction	9/30/2009	Still owned	12/17/2010	TC/ HOME	Yes	8/10/2011	No	No	2/3
Leewood Place- 01-0096	Fremont, OH	40	New Construction	12/23/2002	Still owned	12/1/2003	TC/RD 538/ HOME	Yes	3/1/2005	No	No	2/3
Linden Greene- 05-0076	Jamestown, OH	38	Rehab Only	12/27/2005	Still owned	12/28/2007	TC/RD 538	Yes	12/28/2007	No	No	2/3
Livingston Greene- A10019	Fowlerville, MI	32	Acq./Rehab	3/30/2011	Still owned	8/21/2012	TC/RD 515	Yes	6/6/2013	No	No	2/3
Lockwood Greene- 05-0109	Loudonville, OH	26	New Construction	11/28/2005	Still owned	12/27/2007	TC/RD 515/RD 538	Yes	12/2/2008	No	No	2/3
Lockwood Station- 05-0109	Loudonville, OH	6	New Construction	12/22/2006	Still owned	12/27/2007	TC/RD 515/RD 538	Yes	2/17/2009	No	No	2/3
Luke's Crossing 06-0137	Johnstown, OH	40	Acq./Rehab	2/28/2007	Still owned	11/10/2008	TC/RD 515/RD 538	Yes	1/29/2010	No	No	2/3
Lanning House- 98-0098	Dennison, OH	30	Acq./Rehab	7/1/1998	Still owned	12/30/2000	TC/HOME	Yes	6/23/2003	No	No	2/3
Mallory Meadow- 09-0145	Slippery Rock, PA	50	Acq./Rehab	12/29/2009	Still owned	8/12/2010	TC/RD 515	Yes	8/30/2011	No	No	2/3

Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Manistee Place-811012	Manistee, MI	46	Acq./Rehab	8/10/2012	Still owned	11/21/2013	TC/RD 515	Yes	9/24/2014	No	No	2/3
Mason Greene- KY-09-082	Monticello, KY	46	Acq./Rehab	7/2/2010	Still owned	6/6/2011	TC/ HUD/RD 538/M2M	Yes	11/16/2011	No	No	2/3
McCalla Greene- Z09061	Milan, MI	32	Acq./Rehab	12/16/2010	Still owned	11/14/2011	TC/RD 515/RD 538	Yes	6/8/2012	No	No	2/3
Meadow Glen- 02-0041	Carey, OH	50	Acq./Rehab	12/31/2004	Still owned	12/11/2002	TC/RD 515/RD 538/HOME	Yes	10/12/2006	No	No	2/3
Meridian Greene I- 03-0091	Wintersville, OH	66	New Construction	11/30/2003	Still owned	12/28/2005	TC/RD 538/HOME	Yes	3/1/2007	No	No	2/3
Meridian Greene II- 05-0080	Wintersville, OH	40	New Construction	11/27/2005	Still owned	12/27/2007	TC/RD 538/HOME	Yes	7/17/2008	No	No	2/3
Meyers Greene- TC2012-307	Corry, PA	52	Acq./Rehab	10/1/2012	Still owned	1/13/2014	TC/RD 515	Yes	3/30/2014	No	No	2/3
Moccasin Run- 09-0153	Galion, OH	36	Acq./Rehab	12/30/2009	Still owned	11/4/2010	TC/RD 515	Yes	9/7/2011	No	No	2/3
Monarch Greene- 09-0058	Columbus, OH	44	New Construction	5/3/2010	Still owned	12/12/2011	TC/HOME	Yes	5/1/2012	No	No	2/3
Muirwood Greene-55-0774074	Romney, WV	50	New Construction	5/25/2000	Still owned	6/21/2004	TC/RD 538	Yes	12/9/2004	No	No	2/3
Nantucket Greene- 00-0060	Upper Sandusky, OH	40	New Construction	2/29/2000	Still owned	11/1/2002	TC/RD 538/HOME	Yes	5/22/2003	No	No	2/3
New Forge Crossing- TC2012-614	Waynesboro, PA	60	New Construction	12/10/2012	Still owned	6/26/2014	TC/HOME	Yes	10/28/2015	No	No	2/3
Oak Hollow- 10049	Summerville, SC	44	New Construction	4/29/2011	Still owned	5/30/2012	TC/HOME	Yes	2/8/2013	No	No	2/3
Oakmont Greene I- 34-1902592	Mt. Hope, WV	48	New Construction	5/30/2000	Still owned	10/30/2002	TC/RD 538	Yes	11/26/2002	No	No	2/3
Oakmont Greene II- 37-1477603	Mt. Hope, WV	50	New Construction	7/25/2003	Still owned	12/23/2005	TC/RD 538	Yes	12/7/2007	No	No	2/3
Olde Hickory- 08-0137	Coshocton, OH	33	New Construction	12/5/2008	Still owned	11/16/2010	TC/RD 538	Yes	3/7/2012	No	No	2/3
Olde Mill- A10095	Saugatuck, MI	24	Acq./Rehab	4/20/2012	Still owned	9/25/2012	TC/RD 515/RD 538	Yes	1/9/2014	No	No	2/3
Paigelynn Place- 03-0088	Swanton, OH	60	New Construction	5/28/2004	Still owned	12/29/2005	TC/RD 538/HOME	Yes	12/21/2007	No	No	2/3
Paint Landing- KY-05-034	Stambaugh, KY	24	New Construction	11/18/2005	Still owned	12/28/2007	TC/RD 538	Yes	6/3/2008	No	No	2/3
Paint Lick Station- KY- 05-035	Stambaugh, KY	24	New Construction	11/18/2005	Still owned	12/28/2007	TC/RD 538	Yes	6/3/2008	No	No	2/3
Partridge Place- 99-0047	Paulding, OH	42	New Construction	11/15/2000	Still owned	10/5/2001	TC	Yes	8/16/2002	No	No	2/3
Patrick Place- 03-0083	Paulding, OH	24	Acq./Rehab	12/9/2003	Still owned	12/1/2005	TC/RD 515/HOME/FHLB	Yes	3/20/2007	No	No	2/3
Pembroke Greene- 06-0139	Lodi, OH	18	New Construction	8/24/2006	Still owned	12/12/2008	TC/RD 515/HOME	Yes	7/30/2009	No	No	2/3
Pennington Crossing- TN11-032	Johnson City, TN	42	New Construction	2/24/2012	Still owned	12/10/2013	TC	Yes	12/31/2013	No	No	2/3
Pheasant Ridge - 09-0062	McConnellsville, OH	24	New Construction	9/27/2007	Still owned	11/10/2011	TC	Yes	4/13/2012	No	No	2/3
Pinecrest Greene- 09134	Charleston, WV	46	New Construction	12/29/2009	Still owned	3/25/2011	TC	Yes	6/30/2011	No	No	2/3
Prescott Greene- IN-11-01500	Bunker Hill, IN	32	Acq./Rehab	8/16/2012	Still owned	5/29/2013	TC/RD 515	Yes	6/17/2014	No	No	2/3
Preston's Crossing- KY-08-076	Prestonburg, KY	24	New Construction	11/3/2008	Still owned	12/27/2010	TC/RD 538	Yes	5/12/2011	No	No	2/3
Providence Greene I-37-1477602	Wheeling, WV	50	New Construction	7/30/2003	Still owned	12/29/2005	TC	Yes	12/4/2007	No	No	2/3
Providence Greene II-20-1836889	Wheeling, WV	50	New Construction	4/28/2004	Still owned	11/27/2006	TC	Yes	12/3/2008	No	No	2/3



Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Quail Meadows- 04-0081	Fostoria, OH	50	New Construction	11/1/2004	Still owned	12/19/2006	TC/RD 538/HOME	Yes	4/17/2007	No	No	2/3
Quaker Meadows- 2007-645	Hermilage, PA	40	New Construction	10/31/2007	Still owned	9/30/2011	TC/HOME	Yes	5/9/2012	No	No	2/3
Raceland Meadows- KY-11-013	Raceland, KY	32	Acq./Rehab	5/2/2012	Still owned	3/4/2013	TC/RD 515	Yes	6/28/2013	No	No	2/3
Raytown Crossing- 2008-643	Shippensburg, PA	50	New Construction	9/30/2009	Still owned	12/29/2010	TC/HOME	Yes	8/11/2011	No	No	2/3
Richwood Greene- 09-0063	Richwood, OH	50	Acq./Rehab	12/8/2010	Still owned	12/30/2011	TC/TCAP/1602/HUD	Yes	12/19/2012	No	No	2/3
Riverburch Greene- 02-0044	Washington Court House, OH	60	New Construction	12/5/2002	Still owned	12/29/2004	TC/RD 538/HOME	Yes	6/10/2005	No	No	2/3
Riverview Place- 01-0093	Ripley, OH	33	Acq./Rehab	12/22/2001	Still owned	12/31/2003	TC/HOME/HUD	Yes	6/10/2005	No	No	2/3
Rosewood Manor- 05-0107	Peebles, OH	24	Acq./Rehab	12/2/2005	Still owned	11/9/2007	TC/RD 515	Yes	11/9/2007	No	No	2/3
Russell's Place-04-0090	Barnsville, OH	32	New Construction	11/2/2004	Still owned	12/29/2006	TC/RD 538/HOME	Yes	6/18/2007	No	No	2/3
Yellowbud Place-55-0783585	Moorefield, WV	50	New Construction	6/28/2001	Still owned	12/8/2003	TC	Yes	12/19/2003	No	No	2/3
Sawgrass Greene- KY-03-049	Grayson, KY	54	New Construction	11/19/2003	Still owned	12/22/2005	TC/RD 538	Yes	2/8/2007	No	No	2/3
Schoenbrunn Greene- 11-0078	Sugarcreek, OH	40	Acq./Rehab	7/30/2012	Still owned	6/1/2013	TC/RD 515/HOME	Yes	1/5/2014	No	No	2/3
St. Paul Terrace-55-0752584	Parkersburg, WV	44	New Construction	9/13/1996	Still owned	12/21/1998	TC	Yes	12/21/1998	No	No	2/3
Stableford Crossing- 03-0130	West Union, OH	18	New Construction	8/9/2006	Still owned	10/2/2008	TC/RD 515/HOME	Yes	8/4/2009	No	No	2/3
Sterling Greene- TN10-005	Fayetteville, TN	48	New Construction	12/21/2010	Still owned	7/23/2012	TC/1602	Yes	12/21/2012	No	No	2/3
Stoney Ridge-01-0075	Cadiz, OH	28	New Construction	2/28/2000	Still owned	11/28/2003	TC/HOME	Yes	7/14/2004	No	No	2/3
Sustainable Fellwood II-08-059	Savannah, GA	110	New Construction	3/25/2009	Still owned	12/23/2011	TC/TCAP/HUD RHF	Yes	8/17/2012	No	No	2/3
Sustainable Fellwood III-2009-023	Savannah, GA	100	New Construction	3/25/2009	Still owned	12/27/2011	TC/TCAP/HUD RHF	Yes	11/15/2012	No	No	2/3
Tall Trees- 97-0020	Tiffin, OH	40	New Construction	11/25/1998	Still owned	11/26/1999	TC/HOME	Yes	8/22/2002	No	No	2/3
Terrapin Park- WV-15-01801	Parkersburg, WV	49	Acq./Rehab	4/27/2016	Still owned	6/15/2017	TC	Yes	11/8/2018	No	No	1
The Lofts at Court & Main-12-0105	Washington Court House, OH	31	Acq./Rehab	5/23/2012	Still owned	3/22/2013	LIHTC/HOME	Yes	7/16/2013	No	No	2/3
Harmony Greene-2010-045	Pooler, GA	50	New Construction	3/22/2011	Still owned	10/31/2012	TC	Yes	5/6/2013	No	No	2/3
Abby's Crossing - 06-0114	Bethesda, OH	42	Acq./Rehab	12/26/2006	Still owned	10/29/2008	TC/RD 515/RD 538/HOME	Yes	8/3/2009	No	No	2/3
Adow Village Square- 96-0032	Peebles, OH	30	Acq./Rehab	10/22/1996	Still owned	6/1/1997	TC	Yes	6/1/1997	No	No	2/3
Alexander Yard- 05-0106	New Lexington, OH	42	Acq./Rehab	4/13/2006	Still owned	12/14/2007	TC/RD 515/HOME	Yes	12/18/2008	No	No	2/3
Alston Park- 11-00129	Cincinnati, OH	39	Acq./Rehab	2/10/2012	Still owned	12/30/2013	TC/HOME	Yes	12/2/2015	No	No	2/3
Anderson Crossing- 10-00200	Valparaiso, IN	92	Acq./Rehab	9/30/2011	Still owned	11/13/2012	TC/RD 515	Yes	7/26/2013	No	No	2/3
Armenian Place- TC2011-636	Erie, PA	50	New Construction	9/14/2012	Still owned	12/31/2013	TC/HOME	Yes	4/10/2015	No	No	2/3
Aspen Greene- 03-0056	Byesville, OH	48	Acq./Rehab	12/9/2003	Still owned	12/31/2005	TC/RD 515/HOME	Yes	1/23/2007	No	No	2/3

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Zachary's Crossing 03-0086	Washington Courthouse, OH	40	New Construction	3/8/2005	Still owned	11/1/2005	TC/RD 538/HOME	Yes	4/10/2006	No	No	2/3
Xena Place 11-0122	McArthur, OH	40	Acq./Rehab	12/15/2011	Still owned	12/13/2012	TC/RD 515/HOME	Yes	6/3/2013	No	No	2/3
Edgefield Greene- 12025	Saluda, SC	40	New Construction	12/21/2012	Still owned	5/13/2014	TC	Yes	11/20/2014	No	No	2/3
Liberty Pointe- 2013-C-97	Petersburg, VA	50	New Construction	11/1/2013	Still owned	12/18/2015	TC	Yes	5/31/2016	No	No	1
Autumn Run- 10-0049	Millersburg, OH	38	New Construction	1/31/2011	Still owned	11/30/2012	TC/HOME	Yes	4/10/2013	No	No	2/3
Barton Greene- TN11-013	Greenville, TN	50	New Construction	3/30/2012	Still owned	12/30/2013	TC/RD 538	Yes	6/3/2014	No	No	2/3
Beaumont Greene-05-0114	Athens, Oh	40	New Construction	11/21/2005	Still owned	12/27/2007	TC/RD 538/HOME	Yes	8/5/2008	No	No	2/3
Beaumont Place-05-0076	New Holland, OH	12	New Construction	10/18/2005	Still owned	12/28/2007	TC/RD 538/HOME	Yes	3/3/2009	No	No	2/3
Belle Prairie- 10-0056	Belpre, OH	40	Acq./Rehab	7/25/2011	Still owned	8/13/2012	TC/RD 515/HOME	Yes	1/15/2013	No	No	2/3
Braddock's Greene- 008-07001	Frostburg, MD	50	New Construction	4/15/2008	Still owned	12/31/2010	TC/RD 538	Yes	3/21/2012	No	No	2/3
Brentwood Greene- 08-00700	Kokomo, IN	60	New Construction	10/27/1997	Still owned	9/16/2010	TC/HOME	Yes	8/29/2011	No	No	2/3
Bridgeview Greene- A10091	ST. Ignace, MI	40	Acq./Rehab	4/25/2012	Still owned	12/14/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Canterbury Place-55-0783586	Elkins, WV	50	New Construction	12/13/2001	Still owned	12/13/2004	TC/RD 538	Yes	12/22/2004	No	No	2/3
Catawba Club-55-0759477	Berkeley Spring, WV	64	New Construction	6/30/1999	Still owned	12/4/2001	TC/RD 538	Yes	12/17/2001	No	No	2/3
Charters Cove- A10092	St. Ignace, MI	24	Acq./Rehab	4/25/2012	Still owned	8/30/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Chartwell Greene- 05-0109	Mount Gilead, OH	40	New Construction	11/29/2005	Still owned	11/30/2007	TC/RD 538	Yes	12/2/2008	No	No	2/3
Cheboygan Shores- A10093	Cheboygan, MI	24	Acq./Rehab	4/25/2012	Still owned	12/11/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Chelsea Greene-45-5610282	Shiminston, WV	32	Acq./Rehab	9/25/2013	Still owned	9/23/2013	TC/RD 515	Yes	5/19/2015	No	No	2/3
Chestnut Greene- KY-11-018	Corbin, KY	24	Acq./Rehab	4/17/2012	Still owned	1/31/2013	TC/RD 515	Yes	6/19/2013	No	No	2/3
City View Place- 2010-C-73	Richmond, VA	32	New Construction	2/9/2011	Still owned	10/17/2012	TC	Yes	5/28/2013	No	No	2/3
Clough Commons-11-0120	Waverly, OH	46	New Construction	12/21/2011	Still owned	11/21/2012	TC/RD 515	Yes	6/3/2013	No	No	2/3
Clover Ridge- 06-0095	McConnellsville, OH	24	New Construction	9/20/2007	Still owned	2/5/2009	TC/RD 538/HOME	Yes	11/10/2009	No	No	2/3
Colonial Park- 00-0063	Pomeroy, OH	48	Acq./Rehab	7/12/2000	Still owned	12/10/2002	TC/RD 515/HOME	Yes	9/16/2003	No	No	2/3
Coventry House- 02-0045	Tiffin, OH	30	Acq./Rehab	10/28/2002	Still owned	12/31/2004	TC/RD 538/HOME	Yes	2/7/2007	No	No	2/3
Crawford Place- 11-0121	Upper Sandusky, OH	30	Acq./Rehab	12/20/2011	Still owned	1/1/2013	TC/RD 515/HOME	Yes	6/3/2013	No	No	2/3
Crooked River- A10094	Alanson, MI	16	Acq./Rehab	4/26/2012	Still owned	12/31/2012	TC/RD 515/RD 538	Yes	1/9/2014	No	No	2/3
Crossroads Meadow- 2005-402-2007- 211	Ebensburg, PA	51	New Construction	4/6/2006	Still owned	11/19/2007	TC/RD 538	Yes	6/1/2008	No	No	2/3
Crowfield Greene- 08003	Goose Creek, SC	42	New Construction	3/23/2009	Still owned	12/29/2010	TC/HOME	Yes	2/24/2011	No	No	2/3
Cumberland Meadow- 10-09001	Cumberland, MD	64	New Construction	4/15/2010	Still owned	9/20/2011	TC	Yes	10/4/2012	No	No	2/3



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Devon House- 02-0042	Tiffin, OH	40	New Construction	2/15/2002	Still owned	12/1/2004	TC/RD 538/HOME	Yes	7/20/2005	No	No	2/3
Dutch Ridge-45-3265722	Parkersburg, WV	24	New Construction	11/29/2012	Still owned	6/30/2013	TC/RD 515	Yes	12/11/2013	No	No	2/3
Drake Crossing- 2009-305	Clarion, PA	30	Acq./Rehab	10/7/2010	Still owned	10/3/2011	TC/RD 515	Yes	9/6/2012	No	No	2/3
East Newark Homes- 05-0078	Newark, OH	40	New Construction	11/7/2007	Still owned	12/21/2007	TC/HOME	Yes	12/2/2008	No	No	2/3
Edward's Crossing I-37-1449782	Beaver, WV	44	New Construction	12/6/2002	Still owned	12/9/2004	TC	Yes	12/21/2004	No	No	2/3
Edward's Crossing II-37-1477605	Beaver, WV	44	New Construction	7/29/2003	Still owned	11/30/2005	TC	Yes	11/17/2006	No	No	2/3
Essex Place North - 01-0071	Sycamore, OH	10	New Construction	8/20/2002	Still owned	12/22/2002	TC/HOME	Yes	5/22/2003	No	No	2/3
Fairway Crossing-08-0131	Tiffin, OH	36	New Construction	10/28/2002	Still owned	5/28/2010	TC/HOME	Yes	2/4/2011	No	No	2/3
Forest Edge- 07-0103	Rawson, OH	36	New Construction	11/14/2007	Still owned	10/21/2009	TC/RD 538/HOME	Yes	8/16/2010	No	No	2/3
Fox Run- 04-0078	Piketon, OH	50	New Construction	8/13/2004	Still owned	11/22/2006	TC/RD 538/HOME	Yes	4/20/2007	No	No	2/3
Franklin's Crossing-n/a	Hilliard, OH	61	Acq./Rehab	4/21/1999	Still owned	N/A	Conv.	No	N/A	No	No	N/A
Frontier Run - 09-0146	Convoy, OH	16	Acq./Rehab	12/30/2009	Still owned	8/31/2010	TC/RD 515	Yes	9/7/2011	No	No	2/3
Columbus School- 286136900	Baltimore, MD	50	New Construction	9/14/2012	Still owned	6/20/2014	TC	Yes	11/16/2015	No	No	2/3
Gables at Countryside II-04-0077	Cadiz, OH	24	New Construction	11/3/2004	Still owned	10/5/2006	TC/RD 538	Yes	4/17/2007	No	No	2/3
Glen Abbey Crossing- KY-12-021	Dawson Spring, KY	24	Acq./Rehab	1/31/2013	Still owned	7/31/2013	TC/RD 515	Yes	1/16/2014	No	No	2/3
Glenview - 92-3057	Washington Court House, OH	56	Acq./Rehab	12/9/1991	Still owned	9/13/1993	TC/RD 538	Yes	3/2/1994	No	No	2/3
Grace Meadows- 06-0128	Jeffersonville, OH	40	Acq./Rehab	4/3/2007	Still owned	8/8/2008	TC/RD 515/HOME	Yes	7/14/2009	No	No	2/3
Green Glen I- 34-1811642	Morgantown, WV	48	New Construction	9/29/1995	Still owned	9/6/1996	TC	Yes	12/18/1996	No	No	2/3
Green Glen II-55-0752661	Morgantown, WV	36	New Construction	4/25/1996	Still owned	10/23/1998	TC	Yes	11/25/1998	No	No	2/3
Hilton North Avenue- 985011200	Baltimore, MD	64	New Construction	10/16/2013	Still owned	9/19/2013	TC	Yes	7/21/2015	No	No	2/3
Hattie Greene - 09-0047	Urbana, OH	27	New Construction	2/12/2010	Still owned	6/9/2011	TC/RD 515	Yes	5/1/2012	No	No	2/3
Hayden House- 12-0028	Springfield, OH	44	New Construction	10/31/2012	Still owned	12/31/2013	TC/HOME	Yes	9/10/2014	No	No	2/3
Healy Crossing - 12-0029	Bidwell, OH	32	Acq./Rehab	3/1/2013	Still owned	12/31/2013	TC/RD 515/HOME	Yes	10/23/2014	No	No	2/3
Heritage Greene - 04-0080	Washington Court House, OH	50	New Construction	5/20/2005	Still owned	10/4/2006	TC/RD 538/HOME	Yes	4/20/2007	No	No	2/3
Heritage House-43-1987937	Beckley, WV	50	New Construction	12/19/2002	Still owned	12/30/2004	TC	Yes	11/15/2006	No	No	2/3
Hickory Meadow- 2005-404- 2007-210	Indiana, PA	51	New Construction	10/27/2005	Still owned	12/28/2007	TC/RD 538	Yes	6/30/2008	No	No	2/3
Honeybrook Greene- 08-0132	Utica, OH	40	New Construction	3/6/2009	Still owned	11/17/2010	TC/HOME/FHLB	Yes	3/25/2011	No	No	2/3
Ivy Glen- 00-0057	Washington Court House, OH	60	New Construction	2/28/2000	Still owned	10/31/2002	TC/RD 538/HOME	Yes	9/3/2003	No	No	2/3
Hyden Greene-46-0624258	Phillipi, WV	24	New Construction	12/23/2010	Still owned	12/23/2014	TC/RD 538	Yes	12/17/2015	No	No	2/3

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/4/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Jacob's Crossing- 11-0048	Thurman, OH	42	Acq./Rehab	10/10/2012	Still owned	12/1/2013	TC/RD 515/HOME	Yes	4/9/2014	No	No	2/3
Jamestown Place- 01-0084	Jamestown, OH	24	Acq./Rehab	3/20/2001	Still owned	12/1/2003	TC/RD 515/HOME	Yes	9/27/2004	No	No	2/3
Jenny Greene- 08038	Hardesville, SC	50	New Construction	12/5/2008	Still owned	12/13/2010	TC/RD 538	Yes	2/24/2011	No	No	2/3
Jeremy Park- 09-0148	Orwell, OH	36	Acq./Rehab	12/30/2009	Still owned	9/1/2010	TC/RD 515	Yes	8/31/2011	No	No	2/3
Joseph's Crossing- 55-0767951	Summersville, WV	42	New Construction	3/20/2001	Still owned	12/13/2001	TC	Yes	12/20/2001	No	No	2/3
Joshua Landing- 09-0149	Minford, OH	40	Acq./Rehab	12/31/2009	Still owned	11/1/2010	TC/RD 515	Yes	8/31/2011	No	No	2/3
Junction City- 94-4018	Junction City, OH	24	New Construction	4/19/1993	Still owned	7/17/1995	TC/RD 515	Yes	7/17/1995	No	No	2/3
Koehler Crossing- A10018	Plainwell, MI	28	Acq./Rehab	3/30/2011	Still owned	6/25/2012	TC/RD 515/RD 538	Yes	3/29/2013	No	No	2/3
Tremont Greene- 02-0037	Tiffin, OH	40	New Construction	11/15/2002	Still owned	12/28/2004	TC	Yes	9/22/2005	No	No	2/3
Troon Crossing- 04-0075	Zanesville, OH	60	New Construction	10/28/2004	Still owned	12/28/2006	TC/RD 538/HOME	Yes	4/26/2007	No	No	2/3
Ursula Park- 09-0150	Blanchester, OH	36	Acq./Rehab	12/30/2009	Still owned	10/20/2010	TC/RD 515	Yes	9/7/2011	No	No	2/3
Valley Greene- 05-0079	Barnesville, OH	24	Acq./Rehab	2/11/2011	Still owned	8/31/2007	TC/RD 535/HOME	Yes	11/19/2008	No	No	2/3
Valley View Gardens- TN-10-0148	Dunlap, TN	64	New Construction	12/10/2001	Still owned	7/30/2004	TC/RD 538	Yes	4/18/2005	No	No	2/3
Victory Place-56-2409035	Barboursville, WV	50	New Construction	11/26/2003	Still owned	12/29/2005	TC/RD 515/HOME	Yes	11/13/2007	No	No	2/3
Washington School- 12-0092	Washington Court House, OH	42	Adaptive Re-use	1/8/2013	Still owned	8/31/2014	TC	Yes	9/22/2015	No	No	2/3
Wayne Crossing 09-0088	Greenville, OH	48	Acq./Rehab	6/30/2010	Still owned	10/24/2011	TC/RD 538	Yes	3/23/2012	No	No	2/3
Webster Greene-05-0107	Peebles, OH	36	New Construction	12/2/2005	Still owned	9/1/2007	TC/RD 515	Yes	9/30/2009	No	No	2/3
Webster Glen-05-0107	Peebles, OH	12	New Construction	12/2/2005	Still owned	11/9/2007	TC/RD 538	Yes	9/30/2009	No	No	2/3
Huston Hills- 04-0074	Cambridge, OH	50	Acq./Rehab	10/28/2004	Still owned	12/29/2006	TC/RD 515	Yes	12/29/2006	No	No	2/3
Lloyd House- C12015	Menominee, MI	44	Adaptive Re-use	2/28/2013	Still owned	12/26/2013	TC/RD 538	Yes	9/15/2015	No	No	2/3/4
Brookside Commons- C12014	Traverse City, MI	72	New Construction	1/17/2014	Still owned	12/8/2015	TC/RD 538	Yes	8/29/2016	No	No	2/3/4
Wellington Place- 00-0061	Ottawa, OH	34	New Construction	8/4/2000	Still owned	12/4/2002	TC/HOME	Yes	5/19/2003	No	No	2/3
Willow Greene- 55-0767832	Bridgeport, WV	50	New Construction	6/29/1999	Still owned	12/20/2001	TC/RD 538	Yes	12/21/2001	No	No	2/3
Windjammer Greene- A10096	Munising, MI	24	Acq./Rehab	4/25/2012	Still owned	12/5/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Woda Apartments 94-5098	Powhatan Point, OH	4	Acq./Rehab	4/30/1993	Still owned	1/1/1994	TC/RD 515	Yes	1/1/1994	No	No	2/3
Wood Creek - A10097	Sault Sainte, MI	32	Acq./Rehab	4/25/2012	Still owned	12/28/2012	TC/RD 515/RD 538	Yes	11/18/2013	No	No	2/3
Hilton North Avenue- 985011200	Baltimore, MD	64	New Construction	10/16/2013	Still owned	9/9/2013	TC	Yes	7/25/2015	No	No	2/3/4
Penn Square- 08-11001	Baltimore, MD	79	New Construction	4/14/2011	Still owned	3/14/2011	TC	Yes	7/24/2012	No	No	2/3/4
Oak Valley Gardens- WV-12-02501	Glenville, WV	28	New Construction	12/6/2013	Still owned	12/29/2014	TC	Yes	5/19/2015	No	No	2/3
Amboy Meadows - 036704085	Amboy, IL	12	Acq./Rehab	12/15/16	Still owned		RD 515	No		No	No	N/A



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Bardolph Apts - 032562019	Bardolph, IL	8	Acq./Rehab	12/15/2016	Still owned	5/6/1996	TC/RD 515	Yes	5/6/1996	No	No	N/A
Bayberry B Apartments-098692564	Chillicothe, IL	12	Acq./Rehab	12/15/2016	Still owned	5/1/1993	TC/RD 515	Yes	5/1/1993	No	No	N/A
Beardstown Apts - 199794088	Beardstown, IL	12	Acq./Rehab	12/15/2016	Still owned	2/1/1997	TC/RD 515	Yes	2/1/1997	No	No	N/A
Blackhawk Apts - 447359840	Oregon, IL	23	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Brookwood Apts - 199794088	Matherville, IL	24	Acq./Rehab	12/15/2016	Still owned	5/1/1997	TC/RD 515	Yes	5/1/1997	No	No	N/A
Buda Apts - 496149980	Buda, IL	8	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Cambridge Apts - 358497278	Morris, IL	19	Acq./Rehab	12/15/2016	Still owned	1/14/1994	TC/RD 515	Yes	1/14/1994	No	No	N/A
Colchester Apts - 199794088	Colchester, IL	16	Acq./Rehab	12/15/2016	Still owned	3/1/1997	TC/RD 515	Yes	3/1/1997	No	No	N/A
Country Place - Argenta-86900694	Argenta, IL	12	Acq./Rehab	12/15/2016	Still owned	8/1/1989	TC/RD 515	Yes	8/1/1989	No	No	N/A
Country Place - Braidwood -044149249	Braidwood, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Country Place - Chrisman -405602410	Chrisman, IL	12	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Country Place - Coal City -169645982	Coal City, IL	24	Acq./Rehab	12/15/2016	Still owned	11/20/1992	TC/RD 515	Yes	11/20/1992	No	No	N/A
Dwight 132797635	Dwight, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Edinburgh Commons - IN-18-00500	Edinburgh, IN	24	Acq./Rehab	12/15/2016	Still owned	TBD	TC/RD 515	Yes	TBD	No	No	N/A
Louisa - 940621385	Louisa, KY	36	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Maroa - 093283360	Maroa, IL	20	Acq./Rehab	12/15/2016	Still owned	6/22/1993	TC/RD 515	Yes	6/22/1993	No	No	N/A
Moweaqua I - 249561401	Moweaqua, IL	16	Acq./Rehab	12/15/2016	Still owned	10/11/1989	TC/RD 515	Yes	10/11/1989	No	No	N/A
Moweaqua II - 183490680	Moweaqua, IL	16	Acq./Rehab	12/15/2016	Still owned	5/4/1993	TC/RD 515	Yes	5/4/1993	No	No	N/A
Olney - 152349215	Olney, IL	16	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Ottawa - 340418704	Ottawa, IL	24	Acq./Rehab	12/15/2016	Still owned	7/15/1989	TC/RD 515	Yes	7/15/1989	No	No	N/A
Plymouth - 087024614	Plymouth, IN	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Portland II - 39287979	Portland, IN	20	Acq./Rehab	12/15/2016	Still owned	2/1/1992	TC/RD 515	Yes	2/1/1992	No	No	N/A
Scottsville - 75471250	Scottsville, KY	43	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Vandalia - 194368407	Vandalia, IL	32	Acq./Rehab	12/15/2016	Still owned	11/10/1994	TC/RD 515	Yes	11/10/1994	No	No	N/A
Villa Grove - 396273361	Villa Grove, IL	23	Acq./Rehab	12/15/2016	Still owned	7/13/1994	TC/RD 515	Yes	7/13/1994	No	No	N/A
Portland I - 185833022	Portland, IN	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Deer Run Apts - 465931213	Plano, IL	18	Acq./Rehab	12/15/2016	Still owned	2/10/1992	TC/RD 515	Yes	2/10/1992	No	No	N/A
Eureka Woodridge Apts - 72356803	Eureka, IL	20	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Kreider Commons - TC2014-419	Lebanon, PA	50	Adaptive Re-use	2/19/2014	Still owned	7/29/2016	TC	Yes	7/29/2016	No	No	N/A
Gracefield Apts - 789425540	Ottawa, IL	24	Acq./Rehab	12/15/2016	Still owned	1/1/2005	TC/RD 515	Yes	1/1/2005	No	No	N/A

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Heather Apts - 199794088	Spring Valley, IL	24	Acq./Rehab	12/15/2016	Still owned	6/9/1997	TC/RD 515	Yes	6/9/1997	No	No	N/A
Highland Meadows - 077818362	Lanark, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Highlands Oglesby Apts - 64360735	Oglesby, IL	24	Acq./Rehab	12/15/2016	Still owned	8/23/1999	TC/RD 515	Yes	8/23/1999	No	No	N/A
Kingsfield Apts - 083643036	Piano, IL	16	Acq./Rehab	12/15/2016	Still owned	7/1/2002	TC/RD 515	Yes	7/1/2002	No	No	N/A
Lake Matherville Manor - 408904498	Matherville, IL	40	Acq./Rehab	12/15/2016	Still owned	5/19/2011	TC/RD 515	Yes	5/19/2011	No	No	N/A
Lincoln Northside Apts - 332732378	Lincoln, IL	24	Acq./Rehab	12/15/2016	Still owned	11/1/1996	TC/RD 515	Yes	11/1/1996	No	No	N/A
Lincoln Village - 266250020	Lincoln, IL	40	Acq./Rehab	12/15/2016	Still owned	7/1/1990	TC/RD 515	Yes	7/1/1990	No	No	N/A
Meadows Apts - 58875282	Coal City, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Monmouth Manor - 159252235	Monmouth, IL	32	Acq./Rehab	12/15/2016	Still owned	7/1/2002	TC/RD 515	Yes	7/1/2002	No	No	N/A
Parkview Apartments 33863862	Huntley, IL	24	Acq./Rehab	12/15/2016	Still owned		RD 515	No		No	No	N/A
Parkway Apartments - 367584565	Parkway, IL	24	Acq./Rehab	12/15/2016	Still owned	4/20/2001	TC/RD 515	Yes	4/20/2001	No	No	N/A
Northpointe Apts - 155559106	Pontiac, IL	20	Acq./Rehab	12/15/2016	Still owned	8/17/1999	TC/RD 515	Yes	8/17/1999	No	No	N/A
Edgefield Apts 155559106	Pontiac, IL	16	Acq./Rehab	12/15/2016	Still owned	2/1/1999	TC/RD 515	Yes	2/1/1999	No	No	N/A
Shumway Apts - 155559106	Taylorville, IL	24	Acq./Rehab	12/15/2016	Still owned	6/1/1999	TC/RD 515	Yes	6/1/1999	No	No	N/A
Streator Manor - 211955127	Streator, IL	32	Acq./Rehab	12/15/2016	Still owned	12/31/1989	TC/RD 515	Yes	12/31/1989	No	No	N/A
Sycamore Meadows - 896308742	Sycamore, IL	24	Acq./Rehab	12/15/2016	Still owned	N/A	RD 515	No	N/A	No	No	N/A
Viriden Apartments - 444517343	Viriden, IL	16	Acq./Rehab	12/15/2016	Still owned	5/1/1996	TC/RD 515	Yes	5/1/1996	No	No	N/A
Waterman Gardens-11571	Waterman, IL	24	Acq./Rehab	12/15/2016	Still owned	TBD	RD 515	No	TBD	No	No	TBD
Westridge Apts - FTC 11444	Mendota, IL	24	Acq./Rehab	11/14/2018	Still owned	TBD	TC/RD 515/RD 538	Yes	TBD	No	No	N/A
Woodview Apartments I-098692564	Glasford, IL	20	Acq./Rehab	12/15/2016	Still owned	5/1/1993	TC/RD 515	Yes	5/1/1993	No	No	N/A
Woodview Apartments II-098692564	Glasford, IL	4	Acq./Rehab	12/15/2016	Still owned	10/1/1992	TC/RD 515	Yes	10/1/1992	No	No	N/A
Greensburgh Manor - 14-0107	Green, OH	50	New Construction	11/5/2016	Still owned	10/27/2016	TC	Yes	10/27/2016	No	No	2/3/4
Willoughbeach Terrace- OH-140097	Willowick, OH	50	New Construction	12/19/2014	Still owned	9/30/2016	TC/HDAP/FAF	Yes	9/30/2016	No	No	2/3/4
Fayette Landing- OH-14-0080	Washington Courthouse, OH	36	Acq./Rehab	11/30/2016	Still owned	11/30/2016	TC/HDAP/AHP	Yes	2/2/2018	No	No	1
Everts Hill- OH-15-0016	Circleville, OH	49	Acq./Rehab	3/25/2016	Still owned	12/27/2017	TC	Yes	1/17/2019	No	No	1
Prospect Yard- OH-16-0214	Cleveland, OH	50	Adaptive Re-use	12/31/2014	Still owned	12/30/2019	TC	Yes	7/17/2020	No	No	1
Audubon Crossing- OH-16-0211	Dayton, OH	50	New Construction	8/3/2017	Still owned	10/31/2018	TC	Yes	9/5/2019	No	No	1
Fairwood Commons- OH-16-0081	Columbus, OH	54	New Construction	9/30/2016	Still owned	10/31/2018	TC	Yes	9/5/2019	No	No	1
1575 East Livingston- 17-0081	Columbus, OH	45	New Construction	4/20/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Oliver Crossing- TN14-059	Linden, TN	24	New Construction	1/29/2015	Still owned	11/11/2016	TC	Yes	1/26/2017	No	No	1



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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq/Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
White Oak Crossing- TN16-061	Knoxville, TN	60	New Construction	12/5/2017	Still owned	12/28/2018	TC	Yes	11/26/2019	No	No	1
Keyser Greene- WV-17-00501	Keyser, WV	38	New Construction	5/1/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Culloden Greene - WV-17-02401	Culloden, WV	40	Rehab Only	7/25/2018	Still owned	9/25/2019	TC/RD 515	Yes	12/22/2020	No	No	1
LaBelle Greene III- WV-16-01101	Wheeling, WV	40	New Construction	7/7/2017	Still owned	10/9/2018	TC	Yes	11/19/2019	No	No	1
Terrapin Park Assoc. - WV-15-01806	Parkersburg, WV	49	Rehab Only	4/25/2016	Still owned	6/15/2017	TC	Yes	11/8/2018	No	No	1
Emerald Gardens-WV-15-03301	West Hamlin, WV	42	New Construction	11/18/2016	Still owned	12/15/2017	TC	Yes	11/30/2018	No	No	1
LaBelle Greene- WV-14-01905	Wheeling, WV	40	New Construction	5/1/2015	Still owned	12/29/2016	TC	Yes	11/20/2017	No	No	1
Towne Creek Crossing-KY-17-013	Walton, KY	44	New Construction	12/12/2017	Still owned	9/6/2019	TC/RD 538	Yes	6/3/2020	No	No	1
Tristan Ridge- KY-16-025	Eminence, KY	44	New Construction	10/25/2016	Still owned	12/22/2017	TC	Yes	6/25/2018	No	No	1
Breas Crossing- KY-15-013	Shelbyville, KY	44	New Construction	7/28/2015	Still owned	10/27/2016	TC/RD 538	Yes	4/17/2017	No	No	2/3/4
Pebblecreek Crossing- KY- 15-018	Richmond, KY	48	New Construction	10/19/2015	Still owned	2/6/2017	TC	Yes	6/13/2017	No	No	2/3/4
Willow Commons- TC 2015-614	Wesleyville, PA	45	Adaptive Re-use	11/16/2014	Still owned	12/28/2017	TC	Yes	3/2/2020	No	No	1
Muncy Greene- TC2017-412	Muncy, PA	60	New Construction	12/28/2016	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Allegany Junction- MD-18-04001	Frostburg, MD	40	New Construction	6/26/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Magnolia Greene- MD-18-07001	La Vale, MD	40	New Construction	8/27/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Nelsonville School Commons- 15-0109	Nelsonville, OH	33	Adaptive Re-use	1/20/2016	Still owned	12/5/2017	TC	Yes	11/9/2018	No	No	1
North Avenue Gateway II- MD-16-10001	Baltimore, MD	65	New Construction	10/16/2013	Still owned	7/11/2018	TC	Yes	4/23/2019	No	No	1
Freedman Point-2017-C-129	Hopewell, VA	68	New Construction	5/30/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Brennan Pointe II- 2016-C-102	Newport News, VA	44	New Construction	7/6/2017	Still owned	10/31/2018	TC	Yes	6/21/2019	No	No	1
Woda Bell Diamond Manor-2015-C-104	Norfolk, VA	128	New Construction	12/1/2016	Still owned	12/6/2016	TC	Yes	7/29/2019	No	No	1
Bailey Court- 2014-C-91	Stanardsville, VA	32	Rehab Only	12/15/2015	Still owned	12/27/2016	TC/RD 515/RD 538	Yes	4/12/2018	No	No	1
Brennan Pointe- 2014-C-79	Newport News, VA	44	New Construction	3/11/2015	Still owned	12/31/2016	TC	Yes	12/20/2017	No	No	2/3/4
The Banks at Bertley- 2014-C-83	Norfolk, VA	50	New Construction	12/10/2015	Still owned	12/31/2016	TC	Yes	2/8/2018	No	No	2/3/4
ATZ Place- 2016a-c-003	Kendallville, IN	38	New Construction	9/7/2016	Still owned	9/27/2017	TC	Yes	8/16/2018	No	No	2/3/4
Crystal Valley Manor- IN-16-0400	Middlebury, IN	40	Acq/Rehab	9/1/2017	Still owned	9/24/2018	TC/RD 515/Dev. Fund	Yes	5/3/2019	No	No	1
Silver Lakes- GA-15-21401	Madison, GA	44	New Construction	8/11/2015	Still owned	9/9/2016	TC	Yes	9/14/2017	No	No	2/3/4
Shepard Greene- 16-0149	Zebulon, NC	50	New Construction	12/29/2016	Still owned	12/28/2018	TC	Yes	10/17/2019	No	No	1/4
Ravenwood Crossing- 16-14001	Rocky Mount, NC	80	New Construction	6/1/2017	Still owned	10/7/2019	TC	Yes	8/6/2020	No	No	1/4
Butler Crossing- 14009	Kingstree, SC	40	New Construction	2/9/2015	Still owned	3/31/2016	TC	Yes	11/17/2016	No	No	2/3/4
123 Club- 17069	Beaufort, SC	40	Rehab Only	5/29/2018	Still owned	7/31/2019	TC	Yes	2/27/2020	No	No	TBD

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				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Parrish Greene- 15039	Estill, SC	28	New Construction	9/4/2015	Still owned	7/28/2017	TC	Yes	2/9/2018	No	No	1
Butler Crossing II- 17008	Kingstree, SC	42	New Construction	5/22/2018	Still owned	7/8/2019	TC	Yes	2/27/2020	No	No	TBD
Maple Hill Apartments- G16077	Cadillac, MI	24	Acq./Rehab	4/26/2018	Still owned	TBD	TC/RD 515/538	Yes	TBD	No	No	TBD
Woda Decatur Downs- G16040	Decatur, MI	48	Acq./Rehab	8/24/2017	Still owned	12/15/2018	TC/RD 515/538	Yes	9/3/2020	No	No	1
Woda Lawrence Downs- G16042	Lawrence, MI	48	Acq./Rehab	8/24/2017	Still owned	10/18/2018	TC/RD 515/538	Yes	9/3/2020	No	No	1
Grand View Place- F15025	Grand Rapids, MI	68	New Construction	10/12/2016	Still owned	12/29/2017	TC	Yes	11/7/2019	No	No	1
Cavalier Greene- F15024	Corunna, MI	40	Mixed	6/3/2016	Still owned	12/8/2017	TC	Yes	4/18/2019	No	No	1
Portland School- F15026	Portland, MI	29	Adaptive Re-use	1/21/2016	Still owned	12/27/2017	TC	Yes	7/2/2019	No	No	1
Enchanted Glen- E14021	Colon, MI	36	Rehab Only	2/3/2016	Still owned	2/7/2017	TC/ RD 515/538	Yes	5/21/2018	No	No	1
Lincoln House- E14020	Owosso, MI	28	Adaptive Re-use	7/31/2015	Still owned	12/19/2017	TC/ RD 538	Yes	TBD	No	No	TBD
Hiawatha Apartments- D13068	Iron River, MI	32	Rehab Only	1/16/2015	Still owned	12/23/2015	TC/ RD 515/538	Yes	12/23/2015	No	No	2/3
Adair Court- 2016-034	Atlanta, GA	91	New Construction	4/19/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Mallieu Pointe- 2015-024	East Point, GA	67	New Construction	12/21/2016	Still owned	3/30/2018	TC	Yes	3/7/2019	No	No	1/4
Blackhawk Commons- IN-17-03600	Sheridan, IN	32	Adaptive Re-use	11/26/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Penn Square II- MD-13-01001	Baltimore, MD	61	New Construction	1/10/2013	Still owned	10/9/2015	TC	Yes	8/5/2016	No	No	1/4
Rooney Ridge-NC-17-04001	Roanoke Rapids, NC	50	New Construction	5/8/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Seven45 Stocking- H17032	Grand Rapids, MI	50	New Construction	5/10/2018	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Thompson Greene-0-1289	Butler Twp., PA	50	New Construction	6/23/2014	Still owned	9/28/2016	TC	Yes	8/23/2018	No	No	1/4
Wheatland Crossing-14-0145	Columbus, OH	42	New Construction	7/15/2015	Still owned	11/9/2017	TC	Yes	11/9/2018	No	No	1/4
Woda Milan Village- H-17033	Milan, MI	36	Acq./Rehab	7/12/2018	Still owned	TBD	TC/ RD 538	Yes	TBD	No	No	TBD
Seaborn Greene- 13018	Bamberg, SC	40	New Construction	9/26/2014	Still owned	6/26/2015	TC	Yes	12/7/2015	No	No	2/3
Majors Crossing- 130052	Rock Creek, OH	40	New Construction	11/25/2013	Still owned	11/23/2015	TC	Yes	6/29/2016	No	No	2/3
Northside Drive Apartments-TN13-117	Crossville, TN	40	New Construction	8/24/2014	Still owned	9/18/2015	TC	Yes	12/21/2015	No	No	2/3
Capital Greene-WV-13-01401	Wheeling, WV	40	New Construction	11/18/2014	Still owned	10/30/2015	TC	Yes	12/21/2016	No	No	2/3/4
Tooley Place- 9152473	Elizabeth City, NC	36	New Construction	12/30/2013	Still owned	9/11/2015	TC	Yes	6/2/2016	No	No	2/3
Viewmont Square Court-9150948	Hickory, NC	50	New Construction	7/30/2014	Still owned	12/30/2015	TC	Yes	5/13/2016	No	No	2/3/4
McCormick Greene- WV-14-02201	Sistersville, WV	24	New Construction	8/21/2014	Still owned	9/20/2016	TC	Yes	11/9/2017	No	No	2/3/4
Woodyard Greene- WV-14-02001	Elizabeth, WV	30	New Construction	8/21/2014	Still owned	8/24/2016	TC/RD 538	Yes	12/14/2017	No	No	2/3/4
Pringle House- WV-13-01501	Buckhannon, WV	40	New Construction	10/31/2014	Still owned	9/16/2015	TC/RD 538	Yes	12/21/2016	No	No	2/3/4
Bayridge Greene- WV-13-01301	Keyser, WV	40	New Construction	8/2/2013	Still owned	8/25/2015	TC	Yes	12/21/2016	No	No	2/3/4

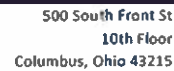


Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
<b>Example: ABC Apts A12345</b>	Lansing, MI	23	Acq/Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
Dawn Ridge- TC2013-472	Carlsle, PA	58	New Construction	7/11/2013	Still owned	12/18/2015	TC	Yes	10/26/2017	No	No	2/3/4
Mary Harvin Center- MD-13-04001	Baltimore, MD	61	New Construction	2/1/2013	Still owned	1/20/2016	TC	Yes	5/11/2017	No	No	2/3/4
Boynton Village- 13-051	Atlanta, GA	43	Rehab Only	1/5/2014	Still owned	10/15/2015	TC	Yes	7/11/2016	No	No	2/3/4
Anderson Greene-18-19	Cedar Rapids, IA	44	New Construction	3/18/2019	Still owned	TBD	TC/Trust Funds	Yes	TBD	No	No	TBD
Wendler Crossing- 18-0072	Columbus, OH	62	New Construction	12/10/2019	Still owned	TBD	TC/City HOME/AHT	Yes	TBD	No	No	TBD
Wheatland Crossing II- 18-0070	Columbus, OH	64	New Construction	9/9/2019	Still owned	TBD	TC/HDAP/City HOME/AHT	Yes	TBD	No	No	TBD
Douglas Greene- TM17-034	Servierville, TN	80	New Construction	7/10/2018	Still owned	TBD	TC/RD 538	Yes	TBD	No	No	TBD
Stevenson Square- TN18-026	Decatur, TN	24	New Construction	9/16/2019	Still owned	TBD	TC/RD 515	Yes	TBD	No	No	TBD
Blue Ridge- TN18-025	Benton, TN	48	Acq/Rehab	9/12/2019	Still owned	TBD	TC/ RD 515	Yes	TBD	No	No	TBD
LaBelle Greene II- WV-18-01201	Wheeling, WV	40	New Construction	6/10/2019	Still owned	TBD	TC/HOME/Trust Funds	Yes	TBD	No	No	TBD
Simons Crossing- TBD	Clarksburg, WV	38	New Construction	4/11/2019	Still owned	TBD	TC/RD 538	Yes	TBD	No	No	TBD
McCormick Crossing- TBD	Sistersville, WV	48	Acq/Rehab	10/1/2020	Still owned	TBD	TC/HOME/Trust Funds/RD 515 and 538	Yes	TBD	No	No	TBD
Kirkman Terrace- KY-18-008	Hopkinsville, KY	45	New Construction	2/21/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Stone Ridge Commons- TC2018-429	York, PA	34	New Construction	1/15/2019	Still owned	TBD	TC/PHARE/HOME	Yes	TBD	No	No	TBD
Barley Square- TC2018-431	Reading, PA	57	New Construction	12/3/2018	Still owned	TBD	TC/HOME/ISRP	Yes	TBD	No	No	TBD
Brock Bridge Landing- MD-19-08001	Jessup, MD	38	New Construction	10/11/2019	Still owned	TBD	TC/RHPP	Yes	TBD	No	No	TBD
Robinson Overlook- TBD	Columbia, MD	48	New Construction	11/29/2019	Still owned	TBD	TC/RHPP	Yes	TBD	No	No	TBD
Old Firetower Place- 18-0085	Greenville, NC	60	New Construction	2/14/2019	Still owned	TBD	TC/RPP/WHLP	Yes	TBD	No	No	TBD
Rivergate Greene- 18-0083	Charlotte, NC	72	New Construction	7/8/2019	Still owned	TBD	TC/Charlotte HTF/WHLP	Yes	TBD	No	No	TBD
Tate Commons- 17-0057	New Bern, NC	68	New Construction	1/3/2018	Still owned	TBD	TC/WHLP	Yes	TBD	No	No	TBD
WC Lowcountry Crossing- 18026	Denmark, SC	34	New Construction	5/16/2019	Still owned	TBD	TC/HOME	Yes	TBD	No	No	TBD
The Hamilton- 118025	Pontiac, MI	42	New Construction	3/28/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Osborn Commons- 118026	Sault Sainte Marie, MI	65	New Construction	1/2/2019	Still owned	TBD	TC/TAD Grant	Yes	TBD	No	No	TBD
Perkins Field- 2018-044	Warner Robins, GA	90	New Construction	3/18/2020	Still owned	TBD	TC/HOME	Yes	TBD	No	No	TBD
Jenkins Street Lofts- 19-0050	Columbus, OH	60	New Construction	7/15/2019	Still owned	TBD	TC/HDAP	Yes	TBD	No	No	TBD
Montgomery Crossing- 19-0051	Ashland, OH	50	New Construction	1/14/2020	Still owned	TBD	TC/HDAP	Yes	TBD	No	No	TBD
Atcheson Place Lofts- 19-0228	Columbus, OH	80	New Construction	11/20/2020	Still owned	TBD	TC/RD 515/538	Yes	TBD	No	No	TBD
WC Elk Meadows- TN19-035	Coalmont, TN	24	Acq/Rehab	TBD	Still owned	TBD	TC	Yes	TBD	No	No	TBD
WC Woodbury Crossing- TN19-036	Corryton, TN	80	New Construction	7/13/2020	Still owned	TBD	TC/HOME	Yes	TBD	No	No	TBD
Carnegie Greene 37- TBD	Wheeling, WV	39	New Construction									

Name and Project Number of Project Owned	City and State	Number of Units	Construction type	Date of Ownership (mm/dd/yy)		Date Project Last Placed in Service	Type of Financing as defined by Tier 1 in Scoring Criteria Section D, #1	LIHTC Project?	8609 issue date (mm/dd/yy)	Has the project materially defaulted on any obligation?*	Does the Project have any uncorrected 8823s that have been outstanding longer than 6 months?*	Included in Owner/GP Experience Points? Which tier(s)?
				Begin	End							
Example: ABC Apts A12345	Lansing, MI	23	Acq./Rehab	3/1/2001	current	10/1/2011	HUD 221 (d)(4)	Yes	1/5/2012	No	No	2/3
WC Mulrwood Greene- TBD	Romney, WV	50	Acq./Rehab	8/24/2020	Still owned	TBD	TC/RD 515/538	Yes	TBD	No	No	TBD
Kellinger Greene- TC2019-442	York, PA	56	New Construction	6/25/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Breas Crossing II- KY-19-004	Shelbyville, KY	37	New Construction	9/10/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Millersview Crossing- MD-21-04001 to 04054	Millersview, MD	54	New Construction	3/18/2020	Still owned	TBD	TC/RHPP	Yes	TBD	No	No	TBD
Holley Pointe- 2019-C-96	Portsmouth, VA	50	New Construction	6/1/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Center Crossing- 19-0046	Hickory, NC	50	New Construction	6/5/2020	Still owned	TBD	TC/RPP/WHLP/HOME	Yes	TBD	No	No	TBD
Harbor Meadows -19-0181	Calabash, NC	60	New Construction	12/20/2019	Still owned	TBD	TC/RPP	Yes	TBD	No	No	TBD
Winston Commons- J19037	Pontiac, MI	54	New Construction	12/20/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
WC Maple Leaf Townhomes- 6466	Green Bay, WI	36	Acq./Rehab	4/25/2019	Still owned	TBD	TC	Yes	TBD	No	No	TBD
WC Oak Ridge- 6456	Adams, WI	24	Acq./Rehab	12/16/2019	Still owned	TBD	TC/PRLF/RD 515	Yes	TBD	No	No	TBD
Anderson Greene II - 19-12	Cedar Rapids, IA	48	New Construction	3/16/2020	Still owned	TBD	TC/HTF	Yes	TBD	No	No	TBD
43 Town Square - 16-0098	Lima, OH	47	Adaptive Re-use	10/5/2017	Still owned	11/28/2018	TC/HOME	Yes	2/14/2020	No	No	TBD
Sparrow Ridge- KY-20-010	Hebron, KY	96	New Construction	11/9/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Harper's Crossing - IN-20-00800	Plainfield, IN	60	New Construction	10/22/2020	Still owned	TBD	TC	Yes	TBD	No	No	TBD
Proctor Place- IN-20-01600	Indianapolis, IN	61	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Canaan Crossing- 2019-058	Madison, GA	60	New Construction	TBD	TBD	TBD	TC/HOME	Yes	TBD	No	No	TBD
Stanton Park Apts- 2019-552	Atlanta, GA	56	New Construction	TBD	TBD	TBD	TC/HOME/BeltLine/Hom efirst	Yes	TBD	No	No	TBD
McKay Manor- FTC 11849	Breese, IL	58	New Construction	TBD	TBD	TBD	TC/HDA	Yes	TBD	No	No	TBD
Parker Glen- FTC 11847	Champaign, IL	64	New Construction	TBD	TBD	TBD	TC/HDA	Yes	TBD	No	No	TBD
Chandler Pointe- 20-18	Wilton, IA	35	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Johnston Crossing- 20-27	Johnston, IA	50	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Williams Terrace- 20-19	Indianola, IA	50	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Haven Crossing- KY-21-011	Walton, KY	57	New Construction	TBD	TBD	TBD	TC	Yes	TBD	No	No	TBD
Landon Greene- NC-20-06001	Statesville, NC	60	New Construction	TBD	TBD	TBD	TC/RPP	Yes	TBD	No	No	TBD
Northlake Center Apts- NC-20-06501	Charlotte, NC	78	New Construction	TBD	TBD	TBD	TC/RPP	Yes	TBD	No	No	TBD
Kershaw Greene- 20-0089	Athens, OH	51	New Construction	TBD	TBD	TBD	TC/OHFA	Yes	TBD	No	No	TBD
Tyler Park- 20-0088	Athens, OH	56	New Construction	TBD	TBD	TBD	TC/OHFA	Yes	TBD	No	No	TBD
Lockbourne Greene- TBD	Columbus, OH	60	New Construction	TBD	TBD	TBD	TC/HNHf	Yes	TBD	No	No	TBD
Dunbury Greene- TBD	Prairie Twp., OH	60	New Construction	TBD	TBD	TBD	TC/HDAp/County Loan	Yes	TBD	No	No	TBD







Woda Cooper Companies, Inc.  
Personnel Organizational Chart  
As of July 1, 2020



WODCO COOPER COMPANIES, LLC IS AN ESOP OWNED COMPANY AND PARENT COMPANY OF WODCO COOPER DEVELOPMENT, LLC, WODCO CONSTRUCTION, INC., AND WODCO MANAGEMENT & REAL ESTATE, LLC



**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 3 Management Experience**

1. Management Experience Narrative
2. Management Plan



## WODA COOPER COMPANIES

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500 South Front St  
10th Floor  
Columbus, Ohio 43215

### Simms Pointe Management Team Experience

Valhalla Management & Real Estate, LLC, dba **Woda Management & Real Estate, LLC (WMRE)**, is a primary entity under Woda Cooper Companies, Inc. which has thirty (30) years of experience. Woda Management & Real Estate (WMRE) is an expert in all areas of property management, leasing, maintenance, and compliance. Over the thirty (30) years, WMRE has managed and maintained rental housing units in fifteen (15) states and over four hundred (400) properties, including mobility and/or sensory accessible units and other targeted populations.

Some of Woda Cooper Companies, Inc.'s properties managed by WMRE include senior affordable housing units, general-occupancy affordable multi-family apartment developments, permanent supportive housing, lease-to-own single family homes, redeveloped communities, replacement public housing communities, mixed-use developments, and market rate and income-restricted units. The properties which WMRE manage are located in urban and rural communities and range in size from 16 units to over 200 units. While the properties managed by WMRE are typically financed with low income housing tax credits and conventional financing, there are other sources of financing used to develop a property. Below is a list of financing sources used to develop properties managed by WMRE:

FHA insured loans, 221d4 and 223f, USDA Rural Development 538 guaranteed loans, USDA Rural Development 515 direct loans, Public Housing Replacement Factor Funds, HOME funds, State trust funds, Federal historic tax credits, State historic tax credits, Brownfield credits, Federal Home Loan Bank ("FHLB") Affordable Housing Program funds, FHLB match funds, HUD's Mark to Market program, Tax exempt bonds with 4% LIHTC credits, Tax Credit Assistance Program funds, Exchange funds or 1602 funds, Housing Assistance Program ("HAP") Section 8 contracts through Public Housing Agencies, Project Based Rental Assistance contracts through HUD and State Housing Finance Agencies ("SHFA's"), 811 contracts, National Housing Trust Funds, Energy Credits, and New Markets Tax Credits.

Whether WMRE maintains oversight and has programming to assure a project is properly marketed, managed and controlled with all necessary oversight and reporting. WMRE understands HUD's requirements and expectations to ensure successful project completion. The team thoroughly understands the programmatic requirements for the Public Housing and the Project Based Voucher programs. As an example, it has experience in working with non-elderly disabled vouchers, VASH vouchers, issuing and/or responding to solicitations regarding project-based vouchers or simply requesting a rent increase on an existing Section 8 contracts, and Section 811 Vouchers. WMRE are experts in all areas of property management, including leasing, maintenance, and compliance.

WMRE's resume can be found in the Woda Cooper Companies, Inc. resume in Tab 2 of this response.



## **MANAGEMENT PLAN**

**Community:** **Simms Pointe**  
**Location:** 270 Lucy Drive  
**City:** Harrisonburg  
**County:** Harrisonburg City  
**State:** Virginia  
**No. of units:** 80  
**Type of units:** Family  
**Owner:** Simms Pointe Limited Partnership  
**Agent:** Woda Management & Real Estate, LLC

1. The Owner, Simms Pointe Limited Partnership (the "Owner") negotiated a Management Agreement (the "Agreement") dated February 8, 2022, with Woda Management & Real Estate, LLC ("Agent"), to provide complete management services for the above captioned Community. The Owner, however, will closely scrutinize management to see that sound management practices are maintained.
  - a. The manager at the Community (the "On-Site Manager") is responsible for the day-to-day operation of the Community. The On-Site Manager is an employee of the Agent. The On-Site Manager's duties include rent collection/deposit, supervision of cleaning and maintenance personnel, Community bookkeeping, resident selection, resident certification, advertising, etc. The On-Site Manager reports to the Regional Manager who approves evictions, purchase orders, and advertising. The Regional Manager answers directly to the Regional Vice President and the Senior Vice President of Woda Management & Real Estate, LLC.
  - b. The Senior Vice President of Management will consult the Owner when interpretations of sound management practices are necessary. The Senior Vice President of Management will consult the Owner for costs exceeding \$5,000 that are not pre-approved through the budgeting process or are not of an emergency nature.
  - c. The key contact person for Management is the Senior Vice President of Management (the "Senior Vice President"). In the Owner's organization, Jeffrey J. Woda or David Cooper Jr. is the Principal contact. Any questions regarding the Community should be addressed to one of these principals.
  - d. The Regional Manager will ensure that all compliance issues are being followed and ensure that the On-Site Manager is correctly operating the Community according to Virginia Tax Credit (TC) rules. The Compliance Director oversees the On-Site Manager for compliance issues associated with TC rules and regulations for the highest occupancy attainable. Any problems or interpretations needed in regulations will be discussed with the Senior Vice President or a Principal of the organization.

- e. The On-Site Manager and maintenance person (the “Maintenance Tech”) are employees of the Agent. Each Community managed by the Agent, will reimburse the Agent for the wages and related payroll taxes. Payroll taxes will be based on the applicable percentage multiplied by the gross wages paid. Fidelity coverage for on-site personnel will be charged to the Community separately.
- 2.
- a. All hiring is to be done in conformance with Equal Employment Opportunity requirements. An ad will be placed in the local newspaper(s) or on line employment sites soliciting resumes for an On-Site Manager. Interviews will be held and references checked. The Senior Vice President will review and approve the Regional Manager’s final hiring decision.
  - b. Since the Regional Manager works out of the Agent’s home office, and since our policy is to have on-site staffing, an On-Site Manager and Maintenance Person will be hired. The hours will be adjusted to address the Community needs. The hours will be 40 hours for the manager during lease up and reduced based on budget and unit count after lease up.
  - c. The On-Site Manager will be responsible for day-to-day operations of the community including marketing, rent collection, repairs and maintenance requests, working with appropriate contractors (builders for warranty items, electricians, plumbers, etc.) and helping with resident functions. The Maintenance Tech will be in charge of day-to-day janitorial duties, minor repairs and maintenance. Grounds maintenance and snow removal services will be responsibilities of the Maintenance Tech or will be contracted out along with trash removal. Through a bidding process, the determination will be made as to the most efficient and economical way to contract out these services.

The on-site staff will work together in dealing with repairs using a work order system. The on-site staff will meet as needed to go over all requests, parts to be ordered, etc.

The staff is accountable to the Regional Manager. Neither the On-Site Manager nor Maintenance Tech has authority to approve major repairs or improvements. All decisions for major repairs are made with the Regional Manager and Senior Vice President who will confer with the owner.

The On-Site Manager will be responsible for maintaining a maintenance log detailing all repairs and maintenance made to each unit at the Community.

On-site staff will be compensated as detailed on the annual budget.
  - d. All employees and/or independent contractors will be oriented to TC program requirements. The On-Site Manager, under the supervision of the

Regional Manager, will be fully trained in TC rules and regulations. The Senior Vice President and Director of Compliance are thoroughly knowledgeable in all aspects of TC management. The Regional Manager is required to attend the SPECTRUM C3P Training, SHCM, or HCCP as well as, various trainings sponsored by industry trade associations. The Senior Vice President, Regional Manager, and Compliance Director hold numerous certifications and will continue to attend trainings and trade association meetings. The Compliance Director and Regional Manager will be responsible for contacting the On-Site Manager about TC updates.

3. a. It is our objective to reach the greatest number of people in our marketing efforts. Advertising will begin 3 months prior to the anticipated construction completion and will be continued as needed or required by the Affirmative Fair Housing and Marketing Plan (AFHM). Advertisements in local newspapers, use of brochures, meeting with local and outreach groups, etc. shall be used. A sign offering marketing information will be posted at the site.

Affirmative marketing practices will be utilized in all advertising according to the AFHM Plan. Contact with county agencies, such as welfare and outreach agencies for the elderly and churches, will assist the Community in contacting the low income and minority persons.

- b. To maintain the highest level of occupancy, a waiting list will be maintained and updated as applications are received. If the waiting list falls below five prospective residents, advertising will be used and community contact fliers will be distributed around the community and to the county agencies. If necessary, the Agent will increase its advertising budget to place more ads in the newspaper or other appropriate media; however, no further incentives are planned at this time.
- c. Advertising will commence 3 months prior to occupancy. At the time marketing starts, all persons having expressed an interest in the Community or who completed an application will be contacted. Marketing will continue until 1-1/2 times the number of applications needed to fill the units are received. Once 100% occupancy has been achieved and a waiting list established a newspaper ad and new flyers will be distributed annually.
- d. The Community will utilize the state's relay telephone number to assist the hearing-impaired public, applicants or residents telephoning the office. If a visually impaired person does not have a companion who is able to read the lease, rules, etc., the On-Site Manager, upon request, will read all leasing documents to them.
- e. In addition to providing handicapped accessible units (i.e. wider doors, door handle levers, knobs on stove fronts, removable sink front in kitchen,

grab bars in bathroom, no cabinets under bathroom sink, etc.), the Community can provide additional reasonable accommodations such as assigning a parking space, delivering mail, picking up the rent and disposing of the resident's garbage. The On-Site Manager and resident can also discuss other needed changes the resident may request. The Owner will be financially responsible through the replacement reserve funds for providing modification, or other special accommodations, needed by household with disability unless the Owner can demonstrate that it would cause an undue financial/administrative burden on the Community.

- f. The Agent will grant a modification if it falls within the architectural/building code of the state. The President or Senior Vice President will review the request and consider the feasibility of the request.
- g. A waiting list will be developed as inquiries occur after full occupancy is attained. The listed households will be contacted, as vacancies are known. Waiting list households will be screened for general information to ascertain their eligibility. The waiting list will be maintained by the On-Site Manager and updated as applications are received and units are available.
- h. The On-Site Manager will keep the inspection reports in each resident's file in the office. Each resident will be required to sign the report and is able to review the report during office hours, or be given a copy if requested.
- i. Each applicant, when selected, may specify a preference for a particular unit. There is no guarantee the resident will get their unit of choice. Finally, before a final unit designation occurs, selected residents are taken on a walking tour of the Community. All residents at move-in (move-out) and at annual intervals will sign and receive copies of an inspection sheet detailing the condition of the unit. The inspection form is a lease attachment. Also, at the On-Site Manager's office, a book of appliance/equipment operating instructions will be on file for residents to borrow.

Upon selection, each resident is given a notification packet with pre-move-in orientation items such as mailing address, unit designation, management procedures, etc. At the time of occupancy, each resident, along with the On-Site Manager, will inspect the apartment and is oriented in all systems of the rental unit.

- j. The Senior Vice President and/or Regional Managers are responsible for establishing resident selection policy. All canceled and/or rejected files will be maintained for all applicants for three (3) years.



- k. The On-Site Manager will be responsible for certification and recertification of incomes per established State Housing Agency guidelines. The Compliance Director will be responsible for reviewing and updating the state allocating agency procedures regarding certification and recertification of incomes. However, a prospective applicant must always meet the most restrictive income limits placed on the Community to be considered for occupancy.
- 4. a. Applications, resident certifications and re-certifications will be maintained in a file at the Agent's home office and in an on-site file. An application fee will be taken for screening cost from each prospective resident.
- 5. a. Occupancy Standards
  - 1 Bedroom ---- Maximum of 2-persons
  - 2 Bedroom ---- Maximum of 4-persons
  - 3 Bedroom ---- Maximum of 6-persons
  - 4 Bedroom ---- Maximum of 8 persons
- b. The following are the leasing policies and procedures for prospective residents that make inquiries to our On-Site Manager. The following steps are followed:
  - (1) A Guest card is completed on all prospective applicants.
  - (2) The On-Site Manager will interview applicant. If applicant is interested, he/she is asked to complete an application to establish eligibility. An application fee is charged to pay the cost of the tenant screening.
  - (3) The applicant is qualified by using local credit report, utility company records, verification of income and assets, criminal checks and any other available information to ascertain that a prospective Resident is not a risk to the Community and/or financial risk as far as rent payment.
  - (4) The applicant will be notified of determination within 5-days of completed application package. If qualified, a rental unit will be offered for lease.
  - (5) Thorough explanations are made as to deposit, leases, rules and regulations, moving dates, etc.
- c. Leases are printed in the English language only. The On-Site Manager will obtain a translator for those not speaking English.
- 6. a. All rent is due on the 1<sup>st</sup> day of the month. Effective on the 6<sup>th</sup> day of the month, a late charge of \$20 will be applied on the past due rent and

additional \$2.00 per day will be added up to \$50.00 until the past due amount is received.

The On-Site Manager is responsible for rent collection (either in person or by mail). A payment drop box is available for after office hours. Said box is secured to the building and securely locked until the On-Site Manager retrieves the payments on the next business day.

All rents will be recorded and kept in the Community's general operating account.

- b. The required security deposit is one-month rent. There is no interest paid on security deposits. Residents unable to make the payment in full initially will have up to three months to pay in full.
- 7. a. Rent increases will be implemented as needed and Community economics dictate and within current restrictions imposed by compliance standards.
- 8. a. The general objective of maintenance is to keep the Community neat and clean, both inside units and outside common areas. The Maintenance Tech will accomplish these objectives by working on a daily/weekly basis. The Maintenance Tech will also be responsible for cleaning/painting each unit upon move-out and handling emergency Resident requests immediately and all other maintenance request within seven days.
- b. The owner will provide the Community's as-built plans which will be located at the Community for use by the On-Site Manager, fire department, police, etc. A copy will also be located at the home office.
- c.
  - 1. Names of qualified repair and service companies in the area will be retained by the On-Site Manager and used as necessary.
  - 2. Smoke alarm inspections will be conducted on a monthly basis. Outside lighting and other grounds work will be completed weekly or as needed.
  - 3. The Maintenance Tech, upon resident move-out, will complete cleaning and redecoration.
  - 4. Painting will be completed as needed with each move-out, but will be at least painted on a five-year rotating basis. Each apartment will be inspected for necessary attention.
  - 5. Carpet will be replaced on an as-needed basis with each move-out. It is anticipated that the useful life of carpet is 7 to 10 years with normal wear and tear.

6. Major repairs will be coordinated through the On-Site Manager. Should a warranty item or plumbing/electrical problem be involved, a professional or the building contractor will be contracted. Any regularly scheduled major improvement will be coordinated with the Agent and the Owner's approval.
7. Grounds upkeep will be either part of the on-site staff responsibilities, contracted to a lawn care professional or the responsibility of the tenant in single family home communities. All lawns will be mowed and trimmed regularly on a weekly basis unless conditions warrant more or less. If the lease designates the lawn care as the responsibility of the tenant and the tenant does not meet this obligation, the on-site manager will cause the grass to be cut and maintained and charge the tenant.

Annually, all lawns will be fertilized as needed. Budgets will be prepared to include annual revisions to the landscaping, spraying and revitalizing of lawns.

8. Trash removal will be contracted with a local company
  9. Part of the regular maintenance program will be regular cleaning of the office and cleaning of common areas and entryways as needed.
- d. Residents will be oriented as to maintenance procedures. Repairs will be reported to the On-Site Manager during office hours. The On-Site Manager and Maintenance Tech will meet regularly to review repair requests. Residents will be given a toll free answering service number, to report emergency repairs after office hours or on weekends.
  - e. Purchase orders and bills will be sent directly to the home office where they will be paid within thirty days of receipt.
  - f. A maintenance budget is prepared annually and reserve funds will be requested for capital items per the operating agreements of the property and the direction of the owner.
9.
    - a. Coin-operated laundry machines will be provided in a separate common, laundry room, including a front load washer for accessibility. If warranted, a vending machine for soda will be installed.
    - b. The laundry equipment will be leased from a third party. Vending machines will be owned and operated by Pepsi/Coke and a commission check mailed to the home office.
    - c. A third party contractor will maintain the laundry machines keys. All money collections will be counted by the third party contractor and when

received, the commission check will be deposited into the general operating account

- d. The cola company will be responsible for maintaining the pop machine.
  - e. All Dryer vents will be cleaned monthly by maintenance in public laundry room. All dryer vents in units will be cleaned at cleaning access by resident and inspected annually by management.
- 10.
- a. Accounting will be completed on an accrual method and records maintained in the home office. The Senior Account Manager of Management Accounting of the Agent will be responsible for preparing and maintaining the records.
  - b. Community Reserve funds will be held in a separate account for the Community in the name of the ownership entity.
  - c. The Senior Vice President will be responsible for the preparation and submission of the annual reports required by the allocating agency.
  - d. An independent CPA will perform and prepare the annual audit.
  - e. The On-Site Manager will maintain all proposed resident files, as well as, complete files on each resident in the on-site office.
  - f. The resident files will be kept on site with electronic copies maintained by the Agent. Investors may contact the Senior Vice President to review the records.
- 11.
- a. The On-Site Manager will instruct each resident to conserve use of Community utilities periodically and will orient the residents to energy conservation.
  - b. A lock box will cover the common area thermostats so that residents cannot access. The common facilities lights will be shut off when no one is using the area or automatic shut offs will be used where appropriate. Windows and doors will be checked annually for air leakage and caulking cracks.
  - c. If financially feasible, any energy conservation measures as identified by an energy audit will be implemented.
- 12.
- If the residents so desire, they may form a residents' association. The On-Site Manager will be the liaison between the residents and the agent. If reasonable and economical, the Agent will grant requests made by Residents.



13. a. The Regional Manager will assist the On-Site Manager, to be knowledgeable and administer state and local laws and program requirements regarding notice of violation, termination and eviction procedures.
  - b. The Regional Manager, with the assistance of a local attorney will assist the On-Site Manager with the notification that must be given to a resident when termination of lease or occupancy agreement is proposed and subsequent eviction procedures through the state or local judicial process is necessary.
15. The President will use their best efforts to comply with investor requirements for property insurance coverage and acquiring such coverage.
16. The management fee is based on 10% of revenue and will be paid on a monthly basis.

Owner: Simms Pointe Limited Partnership  
A Virginia limited partnership

By: \_\_\_\_\_

By: Jeffrey J. Woda

Its: Authorized Representative of the General Partner

Date: \_\_\_\_\_

Agent: WODA MANAGEMENT & REAL ESTATE, LLC

By: \_\_\_\_\_

By: James E. Zambori

Title: Chief Executive Officer

Date: \_\_\_\_\_



**WODA COOPER COMPANIES**

614.396.3200  
www.wodagroup.com  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 5 Financial Information**

1. Pro Forma
2. Budget Narrative
3. Investor LIHTC Equity Commitment Letter
4. Woda Cooper Development, Inc. Audited Year End 2020 Financial Statements
5. Woda Cooper Development, Inc. Internal Financial Statements through September 30, 2021

Development Team and Other Information  
 Simms Pointe  
 2/9/2022

Project Information

Project Name:	Simms Pointe
Owner Name:	Simms Pointe Limited Partnership
Property Address:	264 Lucy Drive
Location City:	Harrisonburg
Location County:	Independent City
Location MSA:	Harrisonburg, VA MSA
Location State:	Virginia
Sponsor:	Woda Cooper Development, Inc.
Administering Partner/Member:	Simms Pointe GP, LLC
Project Partner/Member:	N/A
Development Partner/Member:	N/A
Developer:	Woda Cooper Development, Inc.
Co-Developer:	N/A
Co-Developer:	N/A
General Contractor:	Woda Construction, Inc.
Architect/Engineer:	TBD
Management Agent:	Woda Management & Real Estate, LLC
Construction Start Date:	1/1/23
Placed In Service Year:	2024
Placed In Service Quarter:	2
Placed In Service Date:	4/1/24
Federal Investor Member %:	99.99%
State Investor Member %:	100.00%
Description of product type:	New Construction, General Occupancy, 2 3 story Elevator building



Unit Configuration & Rental Income Projection  
 Simms Pointe  
 2/9/2022

Units		Net Rents	Rental Assist./HAP	Util. Allow.	Gross Rents	60% Max Rents	FMR Rents	Low HOME Rents	High HOME Rents	Percent Rents	Additional Restrictions	AMI Restriction	Monthly Rent	Sq. Ft.	Extended Sq. Ft.
	Effie.				\$ -						None	Other	\$ -		-
	Effie.			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
	Effie.			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
	Effie.			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
	Effie.			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
2	1 BR	\$ 285		\$ 91	\$ 376	\$ 770	\$ 703	\$ 675	\$ 703	29.30%	None	LIHTC 30%	\$ 570	675	1,350
5	1 BR	\$ 408	\$ 282	\$ 105	\$ 795	\$ 770	\$ 703	\$ 675	\$ 703	39.97%	Section 8	LIHTC 40%	\$ 2,040	675	3,375
4	1 BR	\$ 545		\$ 91	\$ 636	\$ 770	\$ 703	\$ 675	\$ 703	49.56%	None	LIHTC 50%	\$ 2,180	675	2,700
1	1 BR	\$ 775		\$ 91	\$ 866	\$ 770	\$ 703	\$ 675	\$ 703	67.48%	None	LIHTC 70%	\$ 775	675	675
4	1 BR	\$ 785		\$ 91	\$ 876	\$ 770	\$ 703	\$ 675	\$ 703	68.26%	None	LIHTC 80%	\$ 3,140	675	2,700
4	2 BR	\$ 330		\$ 117	\$ 447	\$ 924	\$ 927	\$ 810	\$ 927	29.03%	None	LIHTC 30%	\$ 1,320	875	3,500
5	2 BR	\$ 469	\$ 431	\$ 146	\$ 1,046	\$ 924	\$ 927	\$ 810	\$ 927	39.94%	Section 8	LIHTC 40%	\$ 2,345	875	4,375
11	2 BR	\$ 640		\$ 117	\$ 757	\$ 924	\$ 927	\$ 810	\$ 927	49.16%	None	LIHTC 50%	\$ 7,040	875	9,625
5	2 BR	\$ 940		\$ 117	\$ 1,057	\$ 924	\$ 927	\$ 810	\$ 927	68.64%	None	LIHTC 70%	\$ 4,700	875	4,375
21	2 BR	\$ 950		\$ 117	\$ 1,067	\$ 924	\$ 927	\$ 810	\$ 927	69.29%	None	LIHTC 80%	\$ 19,950	875	18,375
2	3 BR	\$ 380		\$ 141	\$ 521	\$ 1,067	\$ 1,207	\$ 935	\$ 1,182	29.30%	None	LIHTC 30%	\$ 760	1,100	2,200
5	3 BR	\$ 503	\$ 659	\$ 208	\$ 1,370	\$ 1,067	\$ 1,207	\$ 935	\$ 1,182	39.98%	Section 8	LIHTC 40%	\$ 2,515	1,100	5,500
2	3 BR	\$ 740		\$ 141	\$ 881	\$ 1,067	\$ 1,207	\$ 935	\$ 1,182	49.54%	None	LIHTC 50%	\$ 1,480	1,100	2,200
3	3 BR	\$ 1,025		\$ 141	\$ 1,166	\$ 1,067	\$ 1,207	\$ 935	\$ 1,182	65.57%	None	LIHTC 70%	\$ 3,075	1,100	3,300
6	3 BR	\$ 1,035		\$ 141	\$ 1,176	\$ 1,067	\$ 1,207	\$ 935	\$ 1,182	66.13%	None	LIHTC 80%	\$ 6,210	1,100	6,600
	4 BR				\$ -						None	Other	\$ -		-
	4 BR			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
	4 BR			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
	4 BR			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
	4 BR			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		None	Other	\$ -		-
80	Total Units												Total: \$ 58,100		70,850

Utility Allowance  
 Simms Pointe  
 2/9/2022

16 92 54 162

Source:	Harrisonburg Redevelopment				Bedroom Size					
Utility	Type of Service		Owner	Tenant	1	2	3	PBV-1	PBV-2	PBV-3
Heat	Electric Heat Pump			X	\$ 12.00	\$ 14.00	\$ 16.00	\$ 68.00	\$ 96.00	\$ 144.00
Cooking	Electric			X	\$ 3.00	\$ 5.00	\$ 6.00			
Lighting	Electric			X						
Other Electric	Electric			X	\$ 17.00	\$ 22.00	\$ 27.00			
A/C	Electric			X	\$ 3.00	\$ 4.00	\$ 5.00			
Water Heating	Electric			X	\$ 9.00	\$ 11.00	\$ 13.00			
Electric Fee	Electric			X	\$ 10.00	\$ 10.00	\$ 10.00			
Other	Electric			X						
Water	Public			X	\$ 16.00	\$ 21.00	\$ 26.00	\$ 37.00	\$ 50.00	\$ 64.00
Sewer	Public			X	\$ 21.00	\$ 30.00	\$ 38.00			
Garbage	Public		X							
Other	Electric									
Other	Electric									
Other	HUD Utility Allowance			X						
Total					\$ 91.00	\$ 117.00	\$ 141.00	\$ 105.00	\$ 146.00	\$ 208.00

Stabilized Annual Operating Budget  
 Simms Pointe  
 2/9/2022

Underwriting Assumptions

7.00%	2024 vacancy rate
7.00%	2025 and beyond vacancy rate (stabilized vacancy)
2.00%	Annual rental revenue growth years 1-5
2.00%	Annual rental revenue growth years 6 and beyond
2.00%	Annual other revenue growth years 1-5
2.00%	Annual other revenue growth years 6 and beyond
3.00%	Annual expense growth years 1-5
3.00%	Annual expense growth years 6 and beyond
3.00%	Annual utilities expense growth years 1-5
3.00%	Annual utilities expense growth years 6 and beyond
6.00%	Management Fee
3.00%	Annual replacement reserve increase

	Total	PUPA	
Gross Annual Rental Revenue	\$ 697,200	\$ 8,715	\$ 64,960
Other Revenue			
Rental Assistance	\$ 82,320	\$ 1,029	
Interest	\$ 400	\$ 5	\$ 4,800
Tenant Charges	\$ 3,600	\$ 45	\$ 400
Laundry/Vending Revenue	\$ 800	\$ 10	
Total Annual Revenue	\$ 784,320	\$ 9,804	
Vacancy	\$ (54,902)	\$ (686)	
Net Annual Operating Revenue	\$ 729,418	\$ 9,118	
Operating Expenses			
Advertising	\$ 2,400	\$ 30	
Legal & Acctg.	\$ 12,000	\$ 150	
Other Professional Fees	\$ 6,400	\$ 80	
On Site Mgmt (Proll)	\$ 56,000	\$ 700	
Other Administrative	\$ 18,000	\$ 225	
Utilities	\$ 52,000	\$ 650	
Maint. & Repairs (Proll)	\$ 56,000	\$ 700	
Other Maintenance	\$ 68,000	\$ 850	
Real Estate Taxes	\$ 49,840	\$ 623	
Other Taxes & Fees	\$ 2,000	\$ 25	
Insurance	\$ 24,000	\$ 300	
Property Mgmt.	\$ 43,765	\$ 547	
Asset Management Fees	\$ -		
Compliance Monitoring	\$ 2,800	\$ 35	
Internet	\$ 8,000	\$ 100	
TBD	\$ -		
TBD	\$ -		
RD Guarantee Fee	\$ -	\$ -	
Miscellaneous	\$ -		
Total Operating Expenses	\$ 401,205	\$ 5,015	
Replacement Reserves	\$ 24,000	\$ 300	
Net Operating Income	\$ 304,213	\$ 3,803	

Sources and Uses of Funds  
 Simms Pointe  
 2/9/2022

Sources of Funds	Rate	Term (yrs)	Amort (yrs)	Amount	Per Unit	%
Federal Investor Equity (Net of Bridge Loan Interest)				\$ 15,045,775	\$ 188,072	74.30%
Federal Investor Equity (Bridge Loan Interest)				\$ -	\$ -	0.00%
Total Federal Investor Equity				\$ 15,045,775	\$ 188,072	74.30%
Total State Investor Equity				\$ -	\$ -	0.00%
Permanent First Mortgage-VHDA Taxable Bond	5.00%	35	35	\$ 3,000,000	\$ 37,500	14.82%
Permanent Second Mortgage-VHDA REACH	2.95%	35	35	\$ 1,600,000	\$ 20,000	7.90%
Permanent Third Mortgage				\$ -	\$ -	0.00%
First Soft Debt Mortgage- CSPDC	0.00%	40	40	\$ 400,000	\$ 5,000	1.98%
Second Soft Debt Mortgage				\$ -	\$ -	0.00%
SLP Contribution				\$ 100	\$ 1	0.00%
Describe Source				\$ -	\$ -	0.00%
Describe Source				\$ -	\$ -	0.00%
Describe Source				\$ -	\$ -	0.00%
General Partner Contribution				\$ -	\$ -	0.00%
Deferred Developer Fee	0.00%		12 years	\$ 202,863	\$ 2,536	1.00%
<b>Total Sources:</b>				<b>\$ 20,248,738</b>	<b>\$ 253,109</b>	<b>100.00%</b>

Uses of Funds						
Land				\$ 1,900,000	\$ 23,750	9.38%
Building Acquisition				\$ -	\$ -	0.00%
Construction				\$ 12,832,923	\$ 160,412	63.38%
Soft Costs				\$ 3,277,633	\$ 40,970	16.19%
Developer Fees				\$ 1,898,055	\$ 23,726	9.37%
Reserves				\$ 340,127	\$ 4,252	1.68%
<b>Total Uses:</b>				<b>\$ 20,248,738</b>	<b>\$ 253,109</b>	<b>100.00%</b>

Percent of Cash Flow After Hard Debt Service Dedicated to Soft Debt	
First Soft Debt Mortgage- CSPDC	50.00%
Second Soft Debt Mortgage	0.00%

Construction Sources					Const. Period Interest	50% Test
Investor Equity				\$ 1,504,578		
Construction Loan	4.00%	30 months		\$ 14,700,000	\$ 459,383	N/A
Permanent First Mortgage-VHDA Taxable	5.00%	24 months		\$ -	\$ -	
Permanent Second Mortgage-VHDA REACH	2.95%	24 months		\$ 1,600,000	\$ 82,593	
Permanent Third Mortgage	0.00%	12 months		\$ -	\$ -	
First Soft Debt Mortgage- CSPDC				\$ 400,000		
Second Soft Debt Mortgage						
		1 months		\$ -	\$ -	
Describe Source		1 months		\$ -	\$ -	
Describe Source		1 months		\$ -	\$ -	
Describe Source		1 months		\$ -	\$ -	
Deferred Fees				\$ 2,044,160	\$ 541,976	
<b>Total Construction Sources:</b>				<b>\$ 20,248,738</b>		



Uses of Funds Detail  
Simms Pointe

Description		Total Project	LIHTC Acq. Basis	LIHTC NC or Rehab Basis	Historic Basis
On-Site Improvements		\$ 1,400,000		\$ 1,400,000	
Off-Site Improvements					
Demolition				\$ -	
Hard Construction (Residential)		\$ 9,856,951		\$ 9,856,951	
Hard Construction (Commercial)					
General Requirements	6.00% of hard costs	\$ 675,417		\$ 675,417	
Builders' Risk Insurance				\$ -	
Tap Fees				\$ -	
Permits				\$ -	
<b>P and P Bond</b>				\$ -	
Contractor Overhead	2.00% of hard costs	\$ 225,138		\$ 225,138	
Contractor Profit	6.00% of hard costs	\$ 675,417		\$ 675,417	
Total Construction Costs		\$ 12,832,923		\$ 12,832,923	
Construction Contingency	5.00% of const costs	\$ 641,646		\$ 641,646	
<b>Other (in Const. Contract)</b>				\$ -	
Land		\$ 1,900,000			
Land Broker Fees					
Building/Acquisition		\$ -			
Architectural Fees		\$ 404,988		\$ 404,988	
Survey Costs		\$ 25,000		\$ 25,000	
Engineering Fees		\$ 128,329		\$ 128,329	
Construction Insurance		\$ 112,500		\$ 112,500	
Construction Interest		\$ 541,976		\$ 354,790	
Additional Construction Interest				\$ -	
Construction Loan Fees	2.00 points	\$ 294,000		\$ 294,000	
Construction LOC Fees	- points	\$ -		\$ -	
State Housing Agency Loan Fees					
Construction Guaranty Fee	- points	\$ -		\$ -	
Permanent Loan Fees (1st)	2.00 points	\$ 60,000			
<b>Inspection Fees</b>		\$ 20,000		\$ 20,000	
<b>Lender Legal</b>		\$ 40,000		\$ 20,000	
Taxes during construction		\$ 5,000		\$ 5,000	
Appraisal		\$ 9,000		\$ 9,000	
Market Study		\$ 6,500		\$ 6,500	
Environmental		\$ 25,000		\$ 25,000	
Relocation					
Housing Credit Application Fee		\$ 1,000			
Housing Credit Reservation Fee		\$ 119,694			
Compliance Monitoring Fees					
Marketing Costs		\$ 5,000			
Title Insurance & Recording		\$ 50,000		\$ 25,000	
Legal Fees (not syndication related)		\$ 65,000		\$ 65,000	
Accounting (Cost Cert.) Fees		\$ 7,500		\$ 7,500	
Asset Management Fees					
Organizational Cost		\$ 25,000			
<b>C.N.A.</b>				\$ -	
<i>Describe</i>				\$ -	
<i>Describe</i>				\$ -	
<i>Describe</i>				\$ -	
<i>Describe</i>				\$ -	
<i>Describe</i>				\$ -	
<i>Cost Segregation Study</i>				\$ -	
<b>Furnishings</b>		\$ 60,500		\$ 60,500	
<b>Contributions In Aid</b>				\$ -	
<b>Permits</b>		\$ 20,000		\$ 20,000	
<b>Taps</b>		\$ 560,000		\$ 560,000	
<b>Soft Cost Contingency</b>		\$ 20,000	\$ -	\$ 20,000	
<b>Green Building Consultant/Cert Fees</b>		\$ 30,000	\$ -	\$ 30,000	
<b>Co-Developer Fee</b>			\$ -	\$ -	
Developer's Fee		\$ 1,898,055		\$ 1,898,055	
Lease Up Reserve					
Operating Reserve		\$ 340,127			
Replacement Reserve					
Taxes and Insurance Escrow					
<b>USDA RD 90/90 Reserve</b>					
<b>Other Reserve/Escrow</b>					
Subtotal:		\$ 20,248,738	\$ -	\$ 17,565,731	\$ -
Bridge Loan Interest		\$ -			
Total Uses:		\$ 20,248,738	\$ -	\$ 17,565,731	\$ -

Square Footages & Costs  
 Simms Pointe  
 2/9/2022

		Construction Cost Per Square Foot	Total Development Cost Per Square Foot
Residential Gross Square Footage	70,850	\$ 181.13	\$ 285.80
Clubhouse Community Space			
Clubhouse Other			
Common Space	17,712		
Hallways, Circulation			
Maintenance Garage			
Other Describe			
Other Describe			
Other Describe			
Other Describe			
Other Describe			
Total	88,562	\$ 144.90	\$ 228.64

	Per Unit	Per Total SF
On-Site Improvements	\$ 17,500	\$ 15.81
Off-Site Improvements	\$ -	\$ -
Demolition	\$ -	\$ -
Hard Construction (Residential)	\$ 123,212	\$ 111.30
Hard Construction (Commercial)	\$ -	\$ -
General Requirements	\$ 8,443	\$ 7.63
Builders' Risk Insurance	\$ -	\$ -
Tap Fees	\$ -	\$ -
Permits	\$ -	\$ -
P and P Bond	\$ -	\$ -
Contractor Overhead	\$ 2,814	\$ 2.54
Contractor Profit	\$ 8,443	\$ 7.63
Total	\$ 160,412	\$ 144.91

Credit Computation  
 Simms Pointe  
 2/9/22

	LIHTC Acq. Basis	LIHTC NC or Rehab Basis	Historic Basis
Total Eligible Basis	\$ -	\$ 17,565,731	\$ -
Non-Qualifying Debt	\$ -	\$ -	\$ -
Historic Tax Credit		\$ -	
Adjustment	\$ -	\$ -	
Net Eligible Basis	\$ -	\$ 17,565,731	\$ -
Basis Boost		130%	
Applicable Fraction	1.0000	1.0000	
Total Qualified Basis	\$ -	\$ 22,835,450	\$ -
Tax Credit Percentage	4.00%	9.00%	20.00%
Annual Housing Credit Computed	\$ -	\$ 2,055,190	
Historic Credit Computed			\$ -
Annual Housing Credit Allocated	\$ -	\$ 1,709,918	
Total Annual Housing Credit	\$ 1,709,918		
Ten Year Housing Credit Total	\$ 17,099,181		

Cash Flow Proforma  
Simmis Pointe  
2/9/22

4/1/24

12/31/2024

	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	2038
<b>Revenue:</b>														
Gross Annual Rental Revenue	\$ 522,900	\$ 711,144	\$ 725,367	\$ 739,874	\$ 754,671	\$ 769,764	\$ 785,159	\$ 800,862	\$ 816,879	\$ 849,881	\$ 866,879	\$ 884,217	\$ 901,901	\$ 919,939
Other Revenue														
Rental Assistance	\$ 61,740	\$ 83,966	\$ 85,645	\$ 87,358	\$ 89,105	\$ 90,887	\$ 92,705	\$ 94,559	\$ 96,450	\$ 100,347	\$ 102,354	\$ 104,401	\$ 106,489	\$ 108,619
Interest	\$ 300	\$ 408	\$ 416	\$ 424	\$ 432	\$ 441	\$ 450	\$ 459	\$ 468	\$ 477	\$ 487	\$ 497	\$ 507	\$ 517
Tenant Charges	\$ 2,700	\$ 3,672	\$ 3,745	\$ 3,820	\$ 3,896	\$ 3,974	\$ 4,053	\$ 4,134	\$ 4,217	\$ 4,301	\$ 4,387	\$ 4,475	\$ 4,566	\$ 4,749
Laundry/Vending Revenue	\$ 600	\$ 816	\$ 832	\$ 849	\$ 866	\$ 883	\$ 901	\$ 919	\$ 937	\$ 956	\$ 975	\$ 1,015	\$ 1,035	\$ 1,056
Total Annual Revenue	\$ 588,240	\$ 800,006	\$ 816,005	\$ 832,325	\$ 848,970	\$ 865,949	\$ 883,268	\$ 900,933	\$ 918,951	\$ 956,077	\$ 975,200	\$ 994,705	\$ 1,014,598	\$ 1,034,890
Vacancy	\$ (41,177)	\$ (56,000)	\$ (57,120)	\$ (58,263)	\$ (59,428)	\$ (60,616)	\$ (61,829)	\$ (63,065)	\$ (64,327)	\$ (65,613)	\$ (66,925)	\$ (68,264)	\$ (71,022)	\$ (72,442)
Net Annual Operating Revenue	\$ 547,063	\$ 744,006	\$ 758,885	\$ 774,062	\$ 789,542	\$ 805,333	\$ 821,439	\$ 837,868	\$ 854,624	\$ 889,152	\$ 906,936	\$ 925,076	\$ 943,576	\$ 962,448
<b>Operating Expenses</b>														
Advertising	\$ 1,800	\$ 2,472	\$ 2,546	\$ 2,622	\$ 2,701	\$ 2,782	\$ 2,865	\$ 2,951	\$ 3,040	\$ 3,131	\$ 3,225	\$ 3,322	\$ 3,422	\$ 3,525
Legal & Acctg.	\$ 9,000	\$ 12,360	\$ 12,731	\$ 13,113	\$ 13,506	\$ 13,911	\$ 14,328	\$ 14,758	\$ 15,201	\$ 15,657	\$ 16,127	\$ 16,611	\$ 17,109	\$ 17,622
Other Professional Fees	\$ 4,800	\$ 6,592	\$ 6,790	\$ 6,994	\$ 7,204	\$ 7,420	\$ 7,643	\$ 7,872	\$ 8,108	\$ 8,351	\$ 8,602	\$ 8,860	\$ 9,126	\$ 9,400
On Site Mgmt (Proll)	\$ 42,000	\$ 57,680	\$ 59,410	\$ 61,192	\$ 63,028	\$ 64,919	\$ 66,867	\$ 68,873	\$ 70,939	\$ 73,067	\$ 75,259	\$ 77,517	\$ 79,843	\$ 82,238
Other Administrative	\$ 13,500	\$ 18,540	\$ 19,096	\$ 19,669	\$ 20,259	\$ 20,867	\$ 21,493	\$ 22,138	\$ 22,802	\$ 23,486	\$ 24,191	\$ 24,917	\$ 25,665	\$ 26,435
Utilities	\$ 39,000	\$ 53,560	\$ 55,167	\$ 56,822	\$ 58,527	\$ 60,283	\$ 62,091	\$ 63,954	\$ 65,873	\$ 67,849	\$ 69,884	\$ 71,981	\$ 74,140	\$ 76,364
Maint. & Repairs (Proll)	\$ 42,000	\$ 57,680	\$ 59,410	\$ 61,192	\$ 63,028	\$ 64,919	\$ 66,867	\$ 68,873	\$ 70,939	\$ 73,067	\$ 75,259	\$ 77,517	\$ 79,843	\$ 82,238
Other Maintenance	\$ 51,000	\$ 70,040	\$ 72,141	\$ 74,305	\$ 76,534	\$ 78,830	\$ 81,195	\$ 83,631	\$ 86,140	\$ 88,724	\$ 91,386	\$ 94,128	\$ 96,952	\$ 99,861
Real Estate Taxes	\$ 37,380	\$ 51,335	\$ 52,875	\$ 54,461	\$ 56,095	\$ 57,778	\$ 59,511	\$ 61,296	\$ 63,135	\$ 65,029	\$ 66,980	\$ 68,989	\$ 71,059	\$ 73,191
Other Taxes & Fees	\$ 1,500	\$ 2,060	\$ 2,122	\$ 2,186	\$ 2,252	\$ 2,320	\$ 2,390	\$ 2,462	\$ 2,536	\$ 2,612	\$ 2,690	\$ 2,771	\$ 2,854	\$ 2,940
Insurance	\$ 18,000	\$ 24,720	\$ 25,462	\$ 26,226	\$ 27,013	\$ 27,823	\$ 28,658	\$ 29,518	\$ 30,404	\$ 31,316	\$ 32,255	\$ 33,223	\$ 34,220	\$ 35,247
Property Mgmt.	\$ 32,824	\$ 45,078	\$ 46,430	\$ 47,823	\$ 49,258	\$ 50,736	\$ 52,258	\$ 53,826	\$ 55,441	\$ 57,104	\$ 58,817	\$ 60,582	\$ 62,399	\$ 64,271
Asset Management Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Compliance Monitoring	\$ 2,100	\$ 2,884	\$ 2,971	\$ 3,060	\$ 3,152	\$ 3,247	\$ 3,344	\$ 3,444	\$ 3,547	\$ 3,653	\$ 3,763	\$ 3,876	\$ 3,992	\$ 4,112
Internet	\$ 6,000	\$ 8,240	\$ 8,487	\$ 8,742	\$ 9,004	\$ 9,274	\$ 9,552	\$ 9,839	\$ 10,134	\$ 10,438	\$ 10,751	\$ 11,074	\$ 11,406	\$ 11,748
TBD	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TBD	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
RD Guarantee Fee	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Operating Expenses	\$ 300,904	\$ 413,241	\$ 425,638	\$ 438,407	\$ 451,561	\$ 465,109	\$ 479,062	\$ 493,435	\$ 508,239	\$ 523,484	\$ 539,189	\$ 555,368	\$ 572,030	\$ 589,192
Expenses Per Unit	\$ 5,015	\$ 5,166	\$ 5,320	\$ 5,480	\$ 5,645	\$ 5,814	\$ 5,988	\$ 6,168	\$ 6,353	\$ 6,544	\$ 6,740	\$ 6,942	\$ 7,150	\$ 7,365
Replacement Reserves	\$ 18,000	\$ 24,720	\$ 25,462	\$ 26,226	\$ 27,013	\$ 27,823	\$ 28,658	\$ 29,518	\$ 30,404	\$ 31,316	\$ 32,255	\$ 33,223	\$ 34,220	\$ 35,247
<b>Net Operating Income</b>	\$ 228,159	\$ 306,045	\$ 307,785	\$ 309,429	\$ 310,968	\$ 312,401	\$ 313,719	\$ 314,915	\$ 315,981	\$ 316,917	\$ 317,708	\$ 318,345	\$ 318,826	\$ 319,277
<b>Debt Service (Hard Debt)</b>														
Permanent First Mortgage-VHDA	\$136,269	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692	\$181,692
Permanent Second Mortgage-VHD	\$55,017	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356	\$73,356
Permanent Third Mortgage	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$191,286	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048	\$255,048
Cash Flow After Debt Service	\$ 36,873	\$ 50,997	\$ 52,737	\$ 54,381	\$ 55,920	\$ 57,353	\$ 58,671	\$ 59,867	\$ 60,933	\$ 61,869	\$ 62,660	\$ 63,297	\$ 63,778	\$ 64,229
Deferred Developer Fee	\$ 36,873	\$ 50,997	\$ 52,737	\$ 54,381	\$ 7,875	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Debt Service (Soft Debt)														
First Soft Debt Mortgage- CSPDC	\$ -	\$ -	\$ -	\$ -	\$ 24,023	\$ 28,677	\$ 29,336	\$ 29,934	\$ 30,467	\$ 30,935	\$ 31,330	\$ 31,649	\$ 31,889	\$ 32,045
Second Soft Debt Mortgage	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cash Flow After DDF & Soft Debt	\$ -	\$ -	\$ -	\$ -	\$ 24,022	\$ 28,676	\$ 29,335	\$ 29,933	\$ 30,466	\$ 30,934	\$ 31,330	\$ 31,648	\$ 31,889	\$ 32,114
<b>Debt Coverage Ratio</b>	1.19	1.2	1.21	1.21	1.22	1.22	1.23	1.23	1.24	1.24	1.25	1.25	1.25	1.25





## **Budget Narrative**

### **Unit Mix/Income:**

Simms Pointe is an 80- unit development consisting of 16 one- bedroom units, 46 two- bedroom units, and 18 three-bedroom units. It will be a mixed income community serving individuals with incomes ranging between 30% and 80% of AMI. All LIHTC income- restricted rents are within the 2021 LIHTC Limits. In addition, Simms Pointe chose to utilize the “Income Averaging” election to serve as much of Harrisonburg community as possible. The proposed unit mix meets IRS guidelines and investor requirements regarding income averaging.

Specifically, the 15 requested Project Based Vouchers will be applied to 5 one- bedroom units, 5 two- bedroom units, and 5 three- bedroom units. All 15 units targeted will be applied to the 40% AMI LIHTC restriction, per Virginia Housing’s QAP guidelines. However, we are committed to having 75% of the families approved for tenancy be those whose annual income does not exceed 30% of AMI.

A detailed unit breakdown is provided on Page 2 of the Project Budget Detail (Pro Forma) included in Tab 5.

### **Sources:**

Simms Pointe’s sources include tax credit equity, a construction loan, a first permanent mortgage, a second mortgage, a soft loan funded by Central Shenandoah Planning Commission (“CSPDC”), and a deferred developer fee. All sources are carefully selected to ensure maximum efficiency of scarce resources.

The equity source for Simms Pointe is generated through the Low-Income Housing Tax Credit (“LIHTC”) program. The development will apply for Virginia’s upcoming 9% credits on March 10, 2022. Simms Pointe will apply for an annual credit request of \$1,709,918. This will generate \$15,045,775 of Federal Investor Equity with an assumed equity price of \$0.88. A letter of interest from the LIHTC Equity Investor, CREA, is provided as item #3 of Tab 5.

In addition, the development plans to utilize two of Virginia Housing’s debt products. The first product is the first permanent mortgage which will both be funded by the Taxable program. The second VH product will be the second mortgage funded by the REACH program for the maximum amount of \$1.6 million. The REACH Loan will be utilized during the construction period as well. Our team is working towards procuring financial commitments, which are contingent on the upcoming application due March 10<sup>th</sup>.

The development team is also working towards securing \$400,000 in soft funds from CSPDC. The application status of this source is outstanding, but the team expects a response prior to the March 10<sup>th</sup> application deadline.

The final source for Simms Pointe is the deferred developer fee. The developer is committed to deferring a portion of its developer fee to finance the remaining amount of costs.

A detailed breakdown of the sources involved in Simms Pointe is provided on Page 5 of the Project Budget Detail (Pro Forma).

Uses of Funds:

Simms Pointe's hard costs include on-site improvements, construction costs which account for federal Davis-Bacon construction wage guidelines, general requirements, contractor's overhead and profit. The total construction costs for Simms Pointe are \$12.8 million.

The other costs for Simms Pointe include land acquisition, soft costs, developer fee, and reserves. The total development cost of Simms Pointe is \$20.2 million, and it is within Virginia Housing's cost limit on a per square foot and per unit basis.

A line itemed list of the uses of funds for Simms Pointe is provided on Page 6 of the Project Budget Detail (Pro Forma).



8141 Lakewood Main St, Ste 208  
Lakewood Ranch, FL 34202

727 329 5479  
CREALLC.COM

February 9, 2022

Mr. Jeffery J. Woda  
Woda Cooper Development, Inc  
500 S. Front St. 10th Floor  
Columbus, OH 43215

**Re: Simms Pointe (the "Project")**

Dear Mr. Woda:

This letter of intent (this "Letter of Intent") summarizes the principal business terms under which a CREA, LLC ("CREA") entity (sometimes referred to herein as the "Limited Partner") will acquire an interest in **Simms Pointe Limited Partnership** (the "Partnership") that will develop and operate the Project. The terms and conditions of the Limited Partner's investment in the Project are subject to the execution of a mutually agreed upon limited partnership agreement (the "Partnership Agreement") and CREA's Capital Committee approval. Capitalized terms not otherwise defined herein will have the meanings set forth in the Partnership Agreement.

#### **1) Project Information and Assumptions**

The Limited Partner's willingness to acquire an interest in the Partnership is based upon the following information and assumptions. CREA reserves the right to update and adjust this Letter of Intent to reflect any changes in the following information and assumptions discovered during the due diligence and underwriting review.

- a) The Project, located in Harrisonburg, VA, will have 80 family units for rent supported by rental assistance granted by 15 project based vouchers. Within the Project, 80 units will be occupied in compliance with the Federal low-income housing tax credit ("LIHTC") requirements of Section 42 of the Internal Revenue Code (the "Code").

- b) Participants

General Partner (0.010%): Simms Pointe GP, LLC

Owner of General Partner: Woda Cooper Development, Inc

Limited Partner (99.989%): CREA Simms Pointe, LLC

Special Limited Partner (0.001%) CREA SLP, LLC

Developer: Woda Cooper Development, Inc.

General Contractor: Woda Construction, Inc.

Property Manager: Woda Management & Real Estate, LLC

Guarantors: General Partner, the Developer, and Woda Cooper Companies, Inc.

- c) Project Timeframe

Closing Date:	January 1, 2023
Construction Completion Date:	April 1, 2024
Qualified Occupancy Date:	July 1, 2024
Stabilized Operations Date:	October 1, 2024

d) **Tax Credit Delivery and Pricing**

The terms and conditions set forth in this Letter of Intent are based upon a financial model initially submitted to CREA. Prior to closing, CREA will underwrite your financial assumptions and prepare a final financial model which, if acceptable to the General Partner, will be attached to the fully executed Partnership Agreement (the “Financial Forecasts”).

Federal Low Income Housing Tax Credits (the “Tax Credits”) are expected to be generated by the Partnership and allocated to the partners.

“Projected Tax Credits” means Tax Credits from the Agency in an amount equal to:

\$1,282,298 (75%)	in 2024
\$1,709,730 (100%)	in 2025 through 2033
\$427,432 (25%)	in 2034

The Financial Forecasts will reflect equity amounts calculated as follows:

**LIHTC Equity**

2022 Federal LIHTC Reservation:	\$1,709,918
Limited Partner Interest:	99.989%
Credit Price:	\$0.88
<hr/>	
Total Federal Equity:	\$15,045,775
<b>TOTAL LIMITED PARTNER EQUITY</b>	<b>\$15,045,775</b>
CREA SLP, LLC Equity:	\$100

**2) Limited Partner’s Capital Contribution**

- a) The Limited Partner will make capital contributions (“Capital Contributions”) to the Partnership in installments (each, an “Installment”), pursuant to the terms and conditions of the Partnership Agreement. Each Installment is subject to the Limited Partner’s receipt of: (i) a satisfactory AIA forms and general contractor lien waivers (during construction), (ii) a current date down endorsement or title update, (iii) satisfactory evidence that the Project is In Balance, (iv) evidence that the conditions of all prior Installments have been satisfied, and (iv) the General Partner’s certification that the representations and warranties contained in the Partnership Agreement are true and correct as of the date of the Installment. Each Installment will be made within ten (10) business days of the receipt and satisfaction of all items listed below. Installments will be made as follows:



- 1) \$1,504,578 (10%), (the “First Installment”), will be funded upon the later to occur of the execution of the Partnership Agreement and satisfaction of the following conditions, as determined by the SLP:
  - a) the Limited Partner’s admission to the Partnership;
  - b) receipt by the SLP of due diligence documentation customary to closing a LIHTC transaction;
  - c) closing of all Project sources and funding of those sources as required pursuant to the Financial Forecasts;
  - d) receipt of a fixed rate commitment for the Permanent Loan(s); and
  - e) receipt of any necessary building permits or approved will-issue letter.
- 2) \$12,036,619 (80%), (the “Second Installment”), will be funded upon the later to occur of April 1, 2024 and satisfaction of the following conditions, as determined by the SLP:
  - a) Lien-free (up to \$100,000 of liens may be bonded over) Construction Completion of the Project sufficient for all residential rental units to be “placed in service” within the meaning of Section 42 of the Code;
  - b) the issuance of all required permanent certificates of occupancy permitting immediate occupancy of all residential rental units;
  - c) architect’s substantial completion certification that the Project has been completed in accordance with the Plans and Specifications;
  - d) receipt of the accountant’s draft Cost Certification and evidence that the “10% Test” has been met];
  - e) receipt by the SLP of satisfactory evidence that all environmental requirements have been met (if applicable); and
  - f) execution of a property management agreement if not required at closing.
- 3) \$752,289 (5%), (the “Third Installment”), will be funded upon the later to occur of July 1, 2024 and satisfaction of the following conditions, as determined by the SLP:
  - a) the achievement of Stabilized Operations (as defined below);
  - b) receipt and approval of the Limited Partner’s third-party review of all of the first year’s tenant files for compliance with the Code and State requirements;
  - c) receipt of the accountant’s final Cost Certification;
  - d) payment in full of the Construction Loan and closing and funding of the Permanent Loans (which may occur simultaneously with the payment of this Third Installment).
  - e) receipt of the final as-built ALTA survey of the Project.

“Stabilized Operations” means a 90 consecutive day period following Construction Completion upon which: (i) the Project has achieved Qualified Occupancy, (ii) the Project has maintained physical occupancy of at least 90%, (iii) closing and funding of the Permanent Loan has occurred, and (iv) the Project has satisfied the Debt Coverage Ratio of 1:15:1:00 and a projected 1.10:1:00 throughout the Compliance Period.
- 4) \$752,289 (5%), (the “Fourth Installment”), will be funded upon the later to occur of October 1, 2024 and satisfaction of the following conditions, as determined by the SLP:
  - a) the IRS Form 8609 for all buildings;
  - b) receipt of the approved and recorded Restrictive Covenant; and
  - c) an executed copy of the Deferred Developer Fee Note; and
  - d) a copy of the filed 168(h) election (if applicable).

- b) All equity Installments during the construction period (including the Construction Completion installment) will be funded on a monthly draw basis. Concurrently with the date a construction draw request is made to a lender, or when an Installment is requested during the construction period, the General Partner will furnish to the SLP a copy of any documents submitted to a lender as part of a construction draw or as otherwise required herein.
- 3) *CREA, LLC approves the use of the income averaging minimum set-aside election.*

*(signature page follows)*

Thank you for your consideration and we sincerely appreciate the opportunity to work with you.

Very truly yours,

CREA, LLC

By: \_\_\_\_\_

A handwritten signature in black ink, appearing to read 'Mike Boyle', is written over a horizontal line.

Name: Mike Boyle

Title: Senior Vice President

**WODA COOPER DEVELOPMENT, INC.**  
**AUDITED FINANCIAL STATEMENTS**  
**DECEMBER 31, 2020 AND 2019**



**WODA COOPER DEVELOPMENT, INC.**

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**Stemen, Mertens, Stickler, CPAs & Associates**  
(A Limited Liability Company)  
**Certified Public Accountants**

(614) 224-0955 FAX (614) 224-0971 • 370 South 5th Street, The Americana, Suite 1 • Columbus, OH 43215

Member American Institute of  
Certified Public Accountants

Member The Ohio Society of  
Certified Public Accountants

### **Independent Auditor's Report**

**To the Shareholders of  
Woda Cooper Development, Inc.  
Columbus, OH**

We have audited the accompanying financial statements of Woda Cooper Development, Inc., which comprise the balance sheets as of December 31, 2020 and 2019, and the related statements of operations, changes in retained earnings and cash flows for the years then ended, and the related notes to the financial statements.

#### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

#### **Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

**Opinion**

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Woda Cooper Development, Inc. as of December 31, 2020 and 2019, and the results of its operations, changes in its retained earnings, and cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

*Stemen, Mertens, Stickler, CPAs & Associates*

Stemen, Mertens, Stickler, CPAs & Associates  
Certified Public Accountants  
Columbus, Ohio  
June 17, 2021

**WODA COOPER DEVELOPMENT, INC.**  
**BALANCE SHEETS**  
**DECEMBER 31, 2020 AND 2019**

**ASSETS**

	<b><u>2020</u></b>	<b><u>2019</u></b>
Cash & Cash Equivalents	\$ 1,047,486	\$ 44,317
Development Fees Receivable (Net of Allowance \$1,113,354 and \$355,952, respectively.)	21,153,722	11,509,096
Pre-Development Costs Receivable, (Net of Allowance \$916,183 and \$846,492, respectively.)	<u>5,627,980</u>	<u>5,199,876</u>

**TOTAL ASSETS**

<b><u>\$ 27,829,188</u></b>	<b><u>\$ 16,753,289</u></b>
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**LIABILITIES AND SHAREHOLDER EQUITY (DEFICIT)**

Accounts Payable	\$ -	\$ 4,000
Total Liabilities	<u>-</u>	<u>4,000</u>

**SHAREHOLDER EQUITY (DEFICIT)**

Retained Earnings	22,633,233	11,553,334
Additional Paid in Capital	<u>5,195,955</u>	<u>5,195,955</u>
Total Shareholder Equity (Deficit)	<u>27,829,188</u>	<u>16,749,289</u>

**TOTAL LIABILITIES AND SHAREHOLDER  
EQUITY (DEFICIT)**

<b><u>\$ 27,829,188</u></b>	<b><u>\$ 16,753,289</u></b>
-----------------------------	-----------------------------

The accompanying notes are an integral part of these financial statements.



**WODA COOPER DEVELOPMENT, INC.**  
**STATEMENTS OF OPERATIONS**  
**FOR THE YEAR ENDED DECEMBER 31, 2020 AND 2019**

<b><u>REVENUES</u></b>	<b>2020</b>	<b>2019</b>
Development Fees	\$ 12,189,499	\$ 6,427,381
Total Revenue From Operations	<u>12,189,499</u>	<u>6,427,381</u>
<b><u>OPERATING EXPENSES</u></b>		
Pre-Development Expenses	1,109,600	212,979
Administrative Expense	-	4,000
Total Operating Expenses	<u>1,109,600</u>	<u>216,979</u>
Income (Loss) from Operations	<u>11,079,899</u>	<u>6,210,402</u>
<b><u>OTHER NON-OPERATING REVENUE (EXPENSES)</u></b>		
Other Non Operating Revenue (Expenses)	-	7,788
Total Other Non-Operating Revenue (Expenses)	<u>-</u>	<u>7,788</u>
<b><u>NET INCOME (LOSS)</u></b>	<u>\$ 11,079,899</u>	<u>\$ 6,218,190</u>

The accompanying notes are an integral part of these financial statements.

**WODA COOPER DEVELOPMENT, INC.**  
**STATEMENTS OF CHANGES IN RETAINED EARNINGS**  
**FOR THE YEAR ENDED DECEMBER 31, 2020 AND 2019**

**RETAINED EARNINGS**

January 1, 2019	\$ 5,411,296
Dividends to Shareholder	(76,152)
Net Income (Loss)	<u>6,218,190</u>

**RETAINED EARNINGS**

December 31, 2019	\$ 11,553,334
Net Income (Loss)	<u>11,079,899</u>

**RETAINED EARNINGS**

December 31, 2020	<u><u>\$ 22,633,233</u></u>
-------------------	-----------------------------

The accompanying notes are an integral part of these financial statements.

**WODA COOPER DEVELOPMENT, INC.**  
**STATEMENTS OF CASH FLOWS**  
**FOR THE YEAR ENDED DECEMBER 31, 2020 AND 2019**

<b><u>Cash Flows From Operating Activities</u></b>	<b><u>2020</u></b>	<b><u>2019</u></b>
Net Income (Loss)	\$ 11,079,899	\$ 6,218,190
Adjustments to Reconcile Net Income (Loss) to Net Cash Provided by (Used in) Operating Activities:		
Change In:		
Development Fees Receivable	(9,644,626)	(5,093,226)
Pre-Development Costs Receivable	(428,104)	(2,176,995)
Accounts Payable	<u>(4,000)</u>	<u>4,000</u>
<b><u>Net Increase (Decrease) In Cash</u></b>	1,003,169	(1,124,183)
<b><u>Cash, ( Beginning )</u></b>	<u>44,317</u>	<u>1,168,500</u>
<b><u>Cash, ( Ending )</u></b>	<u>\$ 1,047,486</u>	<u>\$ 44,317</u>

The accompanying notes are an integral part of these financial statements.

**WODA COOPER DEVELOPMENT, INC.**  
**NOTES TO FINANCIAL STATEMENTS**  
**FOR THE YEAR ENDED DECEMBER 31, 2020 AND 2019**

**Note 1. Summary of Significant Accounting Policies and Organization**

**Organization**

Woda Cooper Development, Inc. ("the Corporation") was organized in the State of Ohio on September 13, 2017. The Corporation's business purpose is to act as a real estate developer and to engage in any lawful act or activity for which corporations may be organized. The sole shareholder of the Corporation is Woda Cooper Companies, Inc.

**Basis of Accounting**

The Corporation accounts for development fees and sales of land under the accrual method when the criteria for recognition have been met. Under the accrual method, revenues and related expenditures are recognized when development services have been provided or when a sale of land has been consummated. The Corporation utilizes the accrual basis of accounting for all other items whereby income is recognized as earned and expenses are recognized as obligations are incurred.

**Cash and Cash Equivalents**

Cash and cash equivalents consist of short-term investments with an original maturity of three months or less, cash on deposit, unrestricted petty cash, money market funds and certificates of deposit.

**Estimates**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

**Income Taxes**

No provision has been made in the financial statements for income taxes for Woda Cooper Development, Inc., since such taxes are the responsibility of the Shareholders.

The Corporation evaluates its uncertain tax positions using the provisions of FASB Accounting Standards Codification (ASC) 740, Income Taxes, for Certain Nonpublic Enterprises. Accordingly, a loss contingency is recognized when it is probable that a liability has been incurred as of the date of the financial statements and the amount of the loss can be reasonably estimated. No loss contingency has been identified during the year under audit.

**Subsequent Events**

The financial statements and related disclosures include evaluation of events up through and including June 17, 2021, which is the date the financial statements were available to be issued.



## **Note 2. Related Party Transactions**

### **Development Fees Receivable**

The Corporation receives development fees from the development of rental communities of which an affiliate of the Corporation has a general partner or managing member interest. The Corporation is owed development fees from related entities totaling \$21,153,722 and \$11,509,096 as of December 31, 2020 and December 31, 2019, respectively.

### **Pre-Development Costs Receivable**

The balance represents non-interest bearing, unsecured advances to entities that have retained the Corporation as the Developer. The Corporation is owed pre-development costs from entities totaling \$5,627,980 and \$5,199,876 as of December 31, 2020 and December 31, 2019, respectively.

## **Note 3. Concentration of Credit Risk**

The Corporation maintains cash balances at CF Bank which are insured by the Federal Deposit Insurance Corporation on balances up to \$250,000. At December 31, 2020 uninsured balances at CF Bank totaled \$1,022,486.



## WODA COOPER COMPANIES

500 South Front St  
10th Floor  
Columbus, Ohio 43215  
Office: 614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

12/1/2021

Indiana Housing and Community Development Authority

Re: Woda Cooper Development, Inc.  
Financial Statements for the Nine Month Period Ended September 30, 2021

To Whom It May Concern:

The attached financial statements for Woda Cooper Development, Inc. ("Woda") for the Nine Month Period Ended September 30, 2021 were prepared by Woda's corporate accounting department. I have not performed an audit of the financial statements and furthermore am employed by Woda and therefore am not independent with respect to Woda. To the best of my knowledge and belief the financial statements accurately reflects the financial position of Woda.

Sincerely,

WODA COOPER DEVELOPMENT, INC.

*Timothy Lordan*

Timothy J. Lordan  
Chief Financial Officer

**Financial Statements**  
**Woda Cooper Development, Inc.**  
**For the Nine Month Period Ended September 30, 2021**

*Subject to independent CPA examination*

**Balance Sheet**  
**Woda Cooper Development, Inc.**

<b><u>ASSETS</u></b>	<b>September 30, 2021</b>
Cash and Cash Equivalents	\$ 2,383,497
Development Fees Receivable (Net of allowance \$1,202,444 and \$298,885 respectively.)	24,155,681
Pre-Development Costs Receivables (Net of allowance \$916,183 and \$846,492, respectively.)	6,278,495
<b><u>TOTAL ASSETS</u></b>	<b><u>\$ 32,817,673</u></b>
 <b><u>LIABILITIES AND SHAREHOLDER EQUITY</u></b>	
 <b><u>LIABILITIES</u></b>	
Accounts Payable	\$ 2,570,066
Accrued Expenses	-
<b><u>TOTAL LIABILITIES</u></b>	<b><u>\$ 2,570,066</u></b>
 <b><u>SHAREHOLDER EQUITY</u></b>	
Additional Paid In Capital	\$ 5,195,955
Retained Earnings	\$25,051,651
<b><u>TOTAL SHAREHOLDER EQUITY</u></b>	<b><u>\$ 30,247,606</u></b>
 <b><u>TOTAL LIABILITIES AND SHAREHOLDER EQUITY</u></b>	 <b><u>\$ 32,817,672</u></b>

*Subject to independent CPA examination*



**Income Statement and Statement of Retained Earnings**  
**Woda Cooper Development, Inc.**

	<b>For the Nine Months Ended</b>
<b><u>Revenues</u></b>	<b><u>September 30, 2021</u></b>
Development Fees	\$ 3,217,873
<b><u>Total Revenue From Operations</u></b>	<b><u>\$ 3,217,873</u></b>
<b><u>Operating Expenses</u></b>	
Pre-Development Expenses	\$ 799,454
<b><u>Total Operating Expenses</u></b>	<b><u>\$ 799,454</u></b>
<b>Income (Loss) From Operations</b>	<b><u>\$ 2,418,418</u></b>
<b><u>Other Non-Operating Revenue (Expenses)</u></b>	
Other Non-Operating Revenue (Expenses)	\$ -
<b>Total Other Non-Operating Revenue (Expenses)</b>	<b><u>\$ -</u></b>
<b><u>NET INCOME (LOSS)</u></b>	<b><u>\$ 2,418,418</u></b>
Retained Earnings, Beginning of the Year	\$ 22,633,233
<b>Retained Earnings, End of Year</b>	<b><u><u>\$ 25,051,651</u></u></b>

*Subject to independent CPA examination*





**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

500 South Front St  
10th Floor  
Columbus, Ohio 43215

**Tab 6**  
**Evidence of Site Control**

## **ASSIGNMENT OF PURCHASE AGREEMENT**

**February 4, 2021**

The undersigned, Woda Cooper Development, Inc. ("**Assignor**"), entered into a Purchase Agreement with Blue Stone Land Company Inc. on November 18, 2021 (the "**Purchase Agreement**") for one real estate parcel consisting of 4.7+/- acres more or less, with the city-assigned lot identification number of 077 A 1, approximately located at Lucy Drive in Harrisonburg, VA 22801 (the "**Assigned Parcel**"). Assignor hereby assigns to Simms Pointe Limited Partnership ("**Assignee**") all of its rights to purchase the Assigned Parcel. By executing in the space provided below, Assignee hereby accepts such assignment and agrees to perform the obligations of the Buyer as set forth in the attached Purchase Agreement. The assignment provided for herein is effective as of the date set forth above.

[Signatures on the following page]



**Assignor:**

**Woda Cooper Development, Inc.**

By: 

Chelsea Arlantino, Vice President & Corporate Counsel

**Assignee:**

**Simms Pointe Limited Partnership**

A Virginia limited partnership

By: Simms Pointe GP, LLC

An Ohio limited liability company

Its General Partner

By: Woda Cooper Communities II, LLC

An Ohio limited liability company

Its Managing Member

By: 

Chelsea Arlantino, Vice President & Corporate Counsel

## PURCHASE AGREEMENT

**THIS PURCHASE AGREEMENT** ("Agreement") is made and entered into this 18 day of November 2021, by and between **Blue Stone Land Company Inc.**, whose tax mailing address is 150 West Mosby Road, Harrisonburg, VA 22801 (hereinafter referred to as the "**Seller**"), and **Woda Cooper Development, Inc.** whose tax mailing address is 500 S. Front Street, 10<sup>th</sup> Floor, Columbus, Ohio 43215 (hereinafter referred to as the "**Buyer**"); and

**WHEREAS**, Seller is the owner of certain real estate parcel consisting of 4.7 +/- acres more or less; with the city assigned lot identification number of 077 A 1, located at Lucy Drive, in Harrisonburg, VA 22801, and as generally depicted on Exhibit A and as described in Exhibit B attached hereto (the "**Property**"), and

**WHEREAS**, the Seller desires to sell and the Buyer desires to purchase the Property upon and subject to the terms and conditions of this Agreement;

**NOW THEREFORE**, for and in consideration of the sum of Fifty Thousand Dollars and no/100 (\$50,000.00) (the "**Initial Earnest Deposit**"); of which Five Thousand Dollars and no/100 (\$5,000.00) becomes non-refundable upon successful rezoning of the Property to R-5; Five Thousand Dollars and no/100 (\$5,000.00) becomes non-refundable upon Buyer submitting an application for Section 42 tax credits to Virginia Housing ("**VH**"); and the remaining Forty Thousand Dollars and no/100 (\$40,000.00) becomes non-refundable upon Buyer's receipt of an award of tax credits from VH; the Initial Earnest Deposit shall be credited to the purchase price at closing; the receipt and the sufficiency of which are hereby acknowledged, and for the further consideration of the covenants and agreements set forth below, the parties agree as follows:

1. Seller shall sell and Buyer shall purchase the Property upon and subject to the terms and conditions of this Agreement.
2. The Purchase Price for the Property shall be One Million Nine Hundred Thousand Dollars and no/100 (\$1,900,000.00) (the "**Purchase Price**").
3. Buyer shall deposit with Reno & Cavanaugh, PLLC (10320 Little Patuxent Parkway, Suite 900, Columbia, MD 21044; Attn: Efre Levy) ("**Title Agent**"), Ten Thousand Dollars and no/100 (\$10,000.00) of the Initial Earnest Deposit within ten (10) business days of the full execution of this Agreement; and shall deposit the remaining Forty Thousand Dollars and no/100 (\$40,000.00) of the Initial Earnest Deposit within ten (10) business days of receipt of an award of tax credits from VH. The Initial Earnest Deposit and all subsequent earnest deposits (the "**Earnest Deposits**") shall be credited towards the Purchase Price at Closing (as defined hereinafter).
4. At Closing, Buyer shall pay Purchase Price as follows: Buyer shall pay to Seller in cash the balance of the Purchase Price that is due after deducting the amount of the Earnest Deposits which will be released to Seller if not previously released. At Closing, Seller shall deliver a transferable, recordable, General Warranty deed to Buyer, or its assignee. The General Warranty deed shall be prepared by Seller. Closing shall occur

within one hundred twenty days after Buyer obtaining a final reservation of Section 42 tax credits from VH, but no later than November 30, 2022 (the “Closing”).

5. Buyer may have two (2) options to extend this Purchase Agreement for sixty (60) days per extension option by notifying Seller and delivering to Title Agent an additional earnest payment of Fifteen Thousand Dollars and no/100 (\$15,000.00) per extension request (“**Subsequent Earnest Deposit**”). All additional Subsequent Earnest Deposit payments shall be non-refundable and credited to the Purchase Price at Closing.
6. Title to the Property shall be free and clear of all liens and encumbrances other than those that do not unreasonably interfere with Buyer’s intended development of the Property, as determined by Buyer in its sole discretion. Buyer shall obtain a title insurance commitment for the Property and if any exception noted therein is unacceptable to Buyer, Buyer shall notify Seller in writing and Seller shall then have 30 calendar days from the notice date to cure such unacceptable exception. If Seller fails to cure such exception within such 30-day period and provide evidence to Buyer of such cure acceptable to Buyer, then Buyer shall have the right to terminate this Agreement by written notice to Seller and the Earnest Deposit shall be returned to Buyer.
7. Buyer’s obligation to purchase the Property shall be subject to and contingent upon satisfaction to Buyer, at Buyer’s sole cost and expense and in Buyer’s sole discretion of the following contingencies specified below:
  - a. Buyer determining that it can obtain all governmental approvals necessary or desirable for the construction of the housing units and all related amenities on the Property.
  - b. Buyer determining that the Property is in compliance with the lender and investor environmental requirements.
  - c. Buyer completing due diligence on the site and market review to its satisfaction.
  - d. Buyer obtaining acceptable zoning approvals for the planned number of units and acceptable site plan approval by the appropriate government.
  - e. Buyer determining that development of Property for Buyer's intended use is economically feasible.
  - f. Buyer determining that the environmental remediation plan and costs associated with environmental reports are acceptable.
  - g. Buyer obtaining a final reservation of Section 42 tax credits from VH.
8. If the contingencies in paragraph 7 above are not satisfied or waived by Buyer, then Buyer shall have sole and absolute right to terminate this Purchase Agreement by written notice to Seller, and neither party shall have any right, obligation, or liability

hereunder. All earnest deposits that have been deemed non-refundable at the point of termination shall be immediately released to Seller if not already released.

9. It is understood and agreed that during the contract period for the Property, Buyer and its designees shall have the right to enter the Property to conduct environmental tests, soils tests, or any other such investigation as deemed necessary by Buyer all at Buyer's sole discretion and expense. Buyer will indemnify and hold harmless Seller from any claims, damages or causes of action which might occur as a result of Buyer's activities on the Property and Buyer shall restore the Property to the condition existing before said test or investigations were conducted.
10. Notices under this Agreement may be given by fax, mail, e-mail, overnight mail, or personal delivery. Any notice that is actually received shall be effective regardless of the manner in which it is sent or delivered.
  - a. Notices to Seller shall be sent to:
    - i. 150 W Mosby Rd, Harrisonburg Va 22801.
  - b. Notices to Buyer shall be sent to:
    - i. 500 S. Front Street, 10<sup>th</sup> Floor, Columbus, Ohio 43215. Attention: Parker Zee.
11. This Agreement shall be assignable by without prior notice to or consent of Seller. Notwithstanding, any assignment pursuant to this paragraph, the original Buyer shall remain fully liable for performance of all its obligations here-under.
12. At Closing, Seller shall pay the cost of deed preparation. Seller agrees to provide Buyer a General Warranty Deed with no encumbrances upon the real property described herein. Buyer shall pay the cost of an owner's title insurance policy in the full amount of the Purchase Price. At Closing, the real estate taxes will be prorated. Seller will be responsible to pay all real estate transfer taxes. Seller and Buyer agree that the Closing or the purchase of the Property and the title insurance for the transaction will be furnished through a title agency of Buyers choice.
13. At Closing, Seller shall grant to Buyer any easements needed for access, stormwater and/or utility service to the Property. Buyer shall pay all third-party costs of surveying, document preparation, legal description preparation, recording fees, etc. in connection with the creation and recordation of any such easements that are necessary. Any necessary easements will be placed in locations determined by Buyer's engineer subject to Seller's consent, with such consent not to be unreasonably withheld or delayed.
14. Seller shall not, without the prior written approval of Buyer, (a) make or permit to be made any material changes or alterations to any part of the Property; (b) enter into any agreement affecting any part of the Property; (c) permit any liens, mortgages, deeds of

trust, or other encumbrances not currently of record to be placed against, or to affect any part of the Property or title to the Property.

15. Any commission owed to any real estate broker or agent as a result of this transaction shall be paid for by the Seller. Seller agrees to pay such commissions to the selling agency and agrees to hold Buyer harmless and to defend Buyer against such claims for any commission.
16. This Purchase Agreement shall be governed by and in accordance with the laws of the State of Virginia.
17. If any term, provision, or condition contained in this Purchase Agreement shall, to any extent, be invalid or unenforceable, the remainder of the Purchase Agreement shall not be affected thereby, and each term, provision or condition of the Purchase Agreement shall be valid and enforceable to the fullest extent provided by law.
18. This Purchase Agreement may be executed in several counterparts, each of which shall be deemed an original for all purposes and all of which together shall constitute and be deemed one and the same agreement.
19. If prior to Closing any portion of the Property shall be taken by condemnation or similar right of eminent domain or like process ("Condemnation"), or damaged by casualty ("Casualty"), which Condemnation or Casualty shall materially affect the Property or Buyer's ability to develop the Property, Seller shall promptly provide notice to Buyer of such Condemnation or Casualty, and Buyer may elect to (a) terminate this Agreement and receive a refund of all deposits and interest thereon paid by Buyer or (b) proceed hereunder notwithstanding such Condemnation or Casualty, with a pro-rata reduction in Purchase Price based upon the percentage of the Property taken and/or damaged.
20. The duration of this offer is open for acceptance until November 24, 2021 by 5:00 P.M. EDT.

**[END OF DOCUMENT -SIGNATURE PAGE FOLLOWS]**



**Signature Page**

Seller:

**Blue Stone Land Company Inc.**

By: Daniel W. Brubaker

Its: Owner

Buyer:

**Woda Cooper Development, Inc.**

By: Maia  
Maia Cooper

Its: Vice President

**Exhibit A**  
**The Property**



**Exhibit B**  
**Legal Description**

## METES & BOUNDS DESCRIPTION:

BEGINNING AT A FOUND IRON PIN ON THE SOUTHERN SIDE OF LUCY DRIVE AT THE  
NORTHEASTERN CORNER OF LOT 2; THENCE  
N 84°47'31" E 728.96 FEET  
TO AN IRON PIN SET; THENCE WITH A CURVE TO THE LEFT HAVING A DELTA ANGLE  
OF 4°03'29", A RADIUS OF 325.00 FEET AND AN ARC DISTANCE OF 23.02 FEET  
LONG CHORD N 82°45'46" E 23.01 FEET  
TO AN IRON PIN SET; THENCE WITH THE WESTERN LINE OF LOT 3  
S 05°12'29" E 303.12 FEET  
TO AN IRON PIN SET IN THE NORTHERN LINE OF EMERALD DRIVE ESTATES, III;  
THENCE  
S 89°33'02" W 344.25 FEET  
TO A FOUND IRON PIN AT THE NORTHEASTERN CORNER OF EMERALD DRIVE ESTATES  
V; THENCE  
S 87°59'57" W 409.53 FEET  
TO A FOUND P.K. NAIL AT THE SOUTHEASTERN CORNER OF LOT 2; THENCE  
N 05°12'29" W 250.84 FEET  
TO THE BEGINNING AND ENCLOSING AN AREA OF 4.731 ACRES (206,069 SQ. FT.).







**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

**Tab 8**  
**Section 3**

1. Section 3 Narrative
2. Section 3 Plan



## WBE/MBE and Section 3 Compliance

### **WBE/MBE**

Simms Pointe Limited Partnership and Woda Cooper Companies, Inc. (collectively the "Proposer") understand that a successful project is not always about "bricks and mortar" – but making an impact in people's lives while at the same time revitalizing the physical environment of the community. The Proposer fully intends to implement as part of the project partnership a policy to ensure that Minority Business Enterprises ("MBEs") and Women-owned Businesses ("WBEs") are involved in the development, and that employment and contracting opportunities are given to individuals and residents residing in the community in which these projects are located to the greatest extent possible (Section 3). The development team and its member affiliates can offer these employment and contracting opportunities throughout the project – from conception, through construction completion, and beyond. The Proposer understands that Harrisonburg Redevelopment & Housing Authority encourages use of MBE/WBE firms to the greatest extent possible. Woda intends to meet its goals to the greatest extent possible for MBE/WBE utilization as well as adherence to the principles of Section 3 (S3) of the Housing and Community Development Act of 1968.

The Proposer finds these goals achievable based on our experience in various markets. Woda Cooper Companies, Inc. has for example completed projects in the City of Baltimore - each utilizing not less than 27% MBEs and 10% WBEs. These include a variety of professions including architects, consultants, engineers, framing carpenters, flooring, paving, masonry contractors, distributors and supply companies, staffing agencies and security companies. In each instance, Woda Cooper Companies, Inc. has met or exceeded these goals set forth at award of a project.

The Proposer will monitor and ensure that the correct specified percentage of the total dollar amount of any contract awarded as a result of this RFP for MBE/WBE and Section 3 is met with success. In addition to any MBE/WBE firms that the Proposer identifies or is contacted by, the Proposer welcomes references of MBE/WBE subcontractors in the Harrisonburg area.

Simms Pointe Limited Partnership and Woda Cooper will actively take positive steps to ensure compliance, to the greatest extent feasible, with all applicable regulations. Below are some of the steps that Simms Pointe Limited Partnership will take with its general contractor, Woda Construction, Inc.

#### 1. Equal Opportunity Officer

Simms Pointe Limited Partnership and Woda Cooper Companies, Inc. will choose an individual, or their designee, within the Company who has the responsibility of negotiating with all bidders, and has the exclusive authority to execute all subcontracts, purchase orders, and service agreements for this project. They will also be responsible for the implementation and reporting construction information for this project.

## 2. Equal Employment Opportunity Policy Statement

It is the policy of our company to comply with the provisions of all federal laws covering equal employment opportunity, discrimination and harassment including but not limited to the Equal Pay Act of 1963, Titles VI and VII of the Civil Rights Act of 1964, Executive Order 11246, Age Discrimination in Employment Act of 1967, Title XI of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, Age Discrimination Act of 1975, Titles I and II of the Americans with Disabilities Act of 1990 and Civil Rights Act of 1991. It is the policy of our company to comply with the provisions of all Virginia Laws covering equal employment opportunity, discrimination and harassment. Our company's EEO Policy is as follows:

Builder: Woda Construction, Inc. will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, age, height, weight, disability, arrest record, veteran service, gender identity, sexual orientation, familial status, or marital status. This policy relates to all our company's employment practices including hiring, transfers, promotions, compensation, benefits and training.

## 3. Reporting Requirements

Builder: Woda Construction, Inc. will comply with all equal employment opportunity compliance reporting requirements.

## 4. Utilization Of Goals — Minority And Female

Contractor: Woda Construction, Inc. set a goal to provide a total workforce integration of 10% MBE/WBE, collectively, in skill trades utilized by our company during the construction of this development to the greatest extent possible. Emphasis on achieving the minority and female utilization goals will be stressed in all subcontractor negotiations and stipulated in each subcontract agreement with our company. We also have developed an on-going self-evaluation program for the purpose of complying with the Americans with Disabilities Act of 1990. This program includes regularly scheduled staff meetings where discussions are held regarding our company's policies and practices; and if needed, suggestions for activities and services. A physical evaluation of our company's office/ground facilities is conducted on a regular basis.

Prior to the start of construction, we will encourage our subcontractors to reach out to the various trade organizations and apprenticeship training facilities applicable to this job and notify them of our need for qualified tradespersons, particularly minorities and females. We will include the EEO policy statement in all the written outreach communications, which we will use in our implementation of the Plan.

## 5. Solicitation / Acceptance Of Bids

For our company to meet our stated MBE and WBE goals, our EEO officer will discuss the equal employment opportunity compliance requirements with all subcontractors and all suppliers to determine if the firm will be able to meet the stated utilization goals. Responsive bids will be reviewed, and our company intends to award subcontracts to the lowest bidder, provided the lowest bidder is qualified to perform to the terms and conditions of the subcontract. It is the procedure of our company to actively seek qualified subcontractors and suppliers and to diligently seek participation of minority,

women, and other disadvantaged owned businesses in the bid and construction process. We will maintain a written file of all contacts made and the results of such contracts.

### **SECTION 3**

Consistent with other affordable housing development projects, the use of **Section 3 (S3) of the Housing and Community Development Act of 1968** helps foster local economic development, neighborhood economic development and improve individual self-sufficiency. The S3 program requires that recipients of 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 and communities. S3 is intended to ensure that when employment or contracting opportunities are generated because of a project, the employment of additional persons or the awarding of contracts for work, preferences are given to low- and very-low income persons or business concerns residing in the community where the project is located.

The requirements of S3 are typically applied to recipients receiving funding (in this case, potentially in the form of government-issued supplemental funding or incentives) on projects and activities involving housing construction or rehabilitation. We would encourage that contractors or subcontractors that receive contracts for the project, comply with the S3 regulations in terms of job training, offering employment and contracting opportunities for low- and very-low income residents, record keeping and reporting responsibilities. If the contractor/subcontractor has a need to hire additional persons or to subcontract portions of the work to any other business to complete the project, S3 requires them to first direct their newly created employment and/or subcontracting opportunities to S3 residents or businesses. Simms Pointe Limited Partnership has set a goal of 10% Section 3 participation in the development and construction of Simms Pointe, meaning that Simms Pointe Limited Partnership will try to make available 10% of the total dollar value of the Contract that will be available for Section 3 opportunities to the greatest extent possible.

Examples of these engagements in Maryland and Baltimore City are:

1) Columbus School – Woda Cooper Companies completed the historic renovation of the Columbus School Apartments, located in Baltimore, Maryland, in June 2014. The 50-unit project was funded by 9% LIHTC as well as HOME Funds from the City of Baltimore. Both the State and City funds required a Commitment to Comply with set MBE/WBE and Section 3 Requirements, which were met by both the Developer (The Woda Group, Inc.) and the General Contractor (Woda Construction, Inc.)

2) North Avenue Gateway I & II – North Avenue Gateway I and II, located in Baltimore, Maryland, were completed in 2013 and 2017, respectively. The 129-unit projects had a Commitment to Comply with both State and City MBE/WBE and Section 3 requirements. In addition to these requirements, Woda Cooper Companies and the project's service provider, the Center for Urban Families, developed a local hiring process that ensured prospective construction applicants would be pulled from the surrounding community, which exceeded the Section 3 Requirements. All project goals and reporting requirements were met by the Developer (The Woda Group, Inc.) and the General Contractor (Harkins Builders, Inc.)

3) Penn Square II – Penn Square II, a 61-unit apartment project located in Baltimore, Maryland, was completed 2016. The project had a Commitment to Comply with both State and City MBE/WBE and Section 3 requirements. In addition to these requirements, Woda Cooper Companies and the project's service provider, the Center for Urban Families, developed a local hiring process that ensured prospective construction applicants would be pulled from the surrounding community, which exceeded the Section 3 Requirements. All project goals and reporting requirements were met by the Developer (The Woda Group, Inc.) and the General Contractor (Harkins Builders, Inc.)

4) Somerset Extension – Somerset Extension is a 64-unit new construction/rehabilitation project in Baltimore, Maryland that is scheduled for completion in 2020. The project is a Rental Assistance Demonstration ("RAD") project in partnership with the Housing Authority of Baltimore City. Project financing includes 4% LIHTC, HUD 221(d) Loan, HABC Capital Funds, and investor equity. The project will meet all City of Baltimore, State of Maryland, and Federal MBE/WBE guidelines and all Section 3 Requirements, as well as any additional local, state, or federal reporting requirements.

Please refer to a draft of Woda Cooper Companies, Inc.'s long-standing Section 3, WBE and MBE utilization plan that follows this narrative, which outlines positive steps that the Proposer will take to ensure compliance, to the greatest extent feasible. We will refine and finalize our plan further upon being awarded Project-based vouchers from Harrisonburg Redevelopment & Housing Authority.



**SECTION 3**  
**WBE – MBE PLAN**  
**Woda Cooper Companies, Inc.**  
**January 14, 2022; Revised for the Harrisonburg Redevelopment & Housing Authority**  
**Project-Based Voucher RFP**  
**February 11th, 2022**

**SECTION 3 MBE WBE  
IMPLEMENTATION PLAN  
Woda Cooper Companies, Inc.  
January 14, 2022; Revised for Harrisonburg Redevelopment & Housing Authority RFP  
February 11, 2022**

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**Exhibits Pages 8 -12**

## **SECTION 3 MBE WBE IMPLEMENTATION PLAN**

**Woda Cooper Companies, Inc.**

**January 14, 2022;**

**Revised for Harrisonburg Housing Authority's PBV RFP February 11, 2022**

Woda Cooper Companies, Inc. (WCCI) is dedicated and committed to pursuing Section 3 and WBE hiring practices, regardless of the applicable funding sources, in and around the affordable housing communities we work in. This document is intended to guide personnel in the implementation of this directive (the "Implementation Plan" or the "Plan"), and to inform any interested parties of our Section 3 MBE and WBE contracting and hiring policy.

### **Section 3 General Policy Statement**

WCCI has developed this Section 3 Plan and Policy in compliance with Title 24 CFR Part 135. This plan is intended to ensure that employment and other economic opportunities generated by qualifying HUD financial assistance shall, to the greatest extent feasible, benefit persons and business identified in the regulation. This document is applicable to contractors, subcontractors, vendors, and for non-construction contracts associated with Section 3 covered activities threshold amounts that meet or exceed \$100,000.

### **Section 3 Purpose**

Section 3 of the Housing and Urban Development Act of 1968, as amended (12 U.S.C. 1701 u) requires WCCI, as a sub-recipient to ensure to the greatest extent feasible, that employment, contracting, and other economic and business opportunities generated by the HUD financial assistance are directed to public housing residents and other low-income persons, particularly recipients of government housing assistance and business concerns that provide economic opportunities to low- and very-low income persons.

*The following is provided as a "user-friendly" guide to assist staff in the implementation of The Woda Group's Section 3 policy. The implementation of this directive is the responsibility of the entire Woda Team.*

#### **1 What is Section 3?**

It is a provision of the Housing and Urban Development Act of 1968. The purpose of Section 3 is to ensure that employment opportunities generated by affordable housing communities are directed to low- and very low-income persons and to Section 3 business concerns, all to the greatest extent possible.

#### **2 What does "To the greatest extent possible" mean at WCCI? We will make every effort to reach out to Section 3 residents.**

- During the bidding process, we will post Help Wanted advertising in the local newspaper and at any time we experience a need for additional consultants, architects, and civil engineers.

- We will reach out with email, regular mail, and face-to-face meetings with the local community action agencies, Youth Build programs, the management company(s) of neighboring affordable communities, and local unemployment offices. Many municipalities maintain lists of certified Section 3 Business concerns – this can be a very valuable resource to assist our efforts.
  - We will advertise on our Facebook page and our website.
  - We will display Section 3 posters and other materials at local places of interest.
  - We will attend local job fairs.
- 3 At WCCI, a “Section 3” resident means, 1) a resident at a Woda Community, 2) a neighboring affordable community, or 3) a low- or very-low income person residing in the area or county where our project will be located.
- 4 At WCCI, a “Section 3 Business Concern” means,
- a) a business that is at least 51% owned by a Section 3 resident; or
  - b) at least 30% of its FT employees include persons that are currently Section 3 residents,
  - c) and ultimately, any contract award of \$50,000 or more to a Section 3 Business Concerns triggers Section 3 hiring compliance.
- 5 Section 3 is not MBE or WBE.

Although these hiring practices and outreach efforts often coincide due to the funding sources, they are not related. Section 3 is based only on income levels. (W-MBE, see item 15.)

- 6 How are “low-income” and “very low-income” determined?

Household income limits are determined by HUD. At WCCI our Project Managers are often the first point of contact regarding the hiring of Section 3 eligible employment applicants and are tasked with screening these individuals.

- 7 What are the Section 3 hiring requirements (aka Goals) at my project?

When certain funding is received, (i.e. HOME/HUD, Project Based Vouchers, and 221 D4 Loan Guarantees, other Federal Sources) it is the source agency of those funds that will set Section 3 hiring goals for the project. When Section 3 is not a requirement of any of the funding sources of a project, as stated earlier, WCCI will pursue the hiring of Section 3 residents, and Section 3 Businesses to the greatest extent possible. To that end WCCI will strive to meet, over the course of a project the following a minimum of ten percent (10%) of the total dollar amount of all Section 3 **covered professional services contracts** to Section 3 Business Concerns.

- **Employment:** WCCI will require all professional service contractors, Section 3 or non-Section 3 Business Concerns to hire Section 3 residents, to the greatest extent feasible, as follows:
  - Ten percent (10%) of the aggregate number (**new hires**) during the project/activity term. (Example: An architect hires 10 new workers. Three of the new workers should be Section 3 eligible persons.)
  - **Note:** There is NO requirement that a professional service contractor hire new employees if awarded a Section 3 contract. If the business concern's current work force is sufficient to complete the project (ALL employees, including office staff), there is no non-compliance with Section 3.
  - A Section 3 and/or neighborhood residency preference is encouraged. (See the list of priority at item #13).

8 Who at WCCI will monitor the Section 3 hiring status at my project?

Ultimately this is the responsibility of each Project Manager (PM). The PM will appoint someone, frequently the Assistant Project Manager (APM), to implement and track Section 3 hiring at a particular project.

9 There are not many hiring opportunities during the design phase of a project, how will we run an effective Section 3 Implementation Plan?

For us to run an effective program, we will emphasize a Section 3 goal into all eligible contracts. Prior to letting any contract, the APM should convene a meeting that includes his Team members, the Owner Project Manager and other relevant individuals (which may include local community group members), and contractor goals should be established. These goals, as well as reporting requirements should be built into all applicable contracts.

10 The PM will be tasked with ensuring:

- Every contract includes a certification from the contractor that he/she will comply with WCCI Section 3 requirements. This certification will include making the best efforts to hire at least \_\_\_\_\_% of new employees from among qualified Section 3 residents.
- Require every bidder to submit a Section 3 Opportunity Plan. The plan will include workforce projections identifying projected new hires; a strategy for ensuring that a least \_\_\_\_\_% of those new hires are qualified Section 3 residents. Modified Section 3 compliance will apply to bids estimated to be between \$ \_\_\_\_\_ and \$ \_\_\_\_\_
- Require ALL bidders to complete the Section 3 Self-Certification forms (Exhibits A and B)

If the estimated value of the contract is in excess of \$100,000, bidders will be required to submit a detailed Section 3 Action Plan consisting of a:

- Section 3 Business Application
- Section 3 Business Certification
- Section 3 Business Utilization Plan
- Resident Opportunity Data



- Immediately upon execution of the contracts, require the contractor to submit a schedule of expected new hires for each project and that the Section 3 Coordinator is notified of this schedule.
- Require every contractor to submit accurate biweekly reports on new hires and certified payrolls once the contracted scope is underway. Ensure files and data are maintained to document compliance with WCCI's Section 3 requirements in contracting and employment, and the required annual performance reports are submitted to HUD.

11 Who at WCCI will initiate the Section 3 Employment Advertising and Community Outreach?

These tasks will be managed and documented by the Owner Project Manager. These efforts will be documented, archived, and frequently communicated to the team.

12 Does WCCI provide training to Section 3 eligible applicants and Business Concerns?

Yes, but on a limited basis. During the design phase of a project the hiring is nearly 100% focused on Section 3 Business Concerns for professional services. These services require a specific professional discipline; opportunities for individual and business trainings are rare. When the opportunity does arise please discuss this with the Project Manager.

13 Section 3 hiring and contracting at WCCI.

All our projects will strive to adhere to this Plan, however, some projects will be subject to a very strict process as dictated by applicable funding sources. It is the responsibility of all personnel involved to seek guidance, share information, and comprehend Section 3 applicability.

14 **\*Section 3 Area – \*\*(AS AMENDED January 14th, 2022 FOR THE Lynchburg Redevelopment & Housing Authority Project-Based Vouchers RFP).**

For the purposes of this directive, specifically for the Co-Developer Services RFP, the area job training, employment, and outreach for Section 3 Business Concerns are describe as:

Priority

1	<hr/>
2	<hr/>
3	<hr/>

15 What are MBE and WBE?

They stand for Minority and Women (Owned) Business Enterprises. These entities are often certified/registered with local and state municipalities. When a project is funded with applicable sources MBE and WBE contracting requirements often apply. Often these contracting requirements are “goals” we at WCCI strive to meet, and at times exceed.

Each PM will engage the development team to understand what the specific requirements are with each project. The PM will conduct the outreach and document all such actions in much the same fashion as for Section 3. Priority for outreach starts at the local MHA, the local Economic Development Office, and any other applicable local agencies.

Unlike Section 3, MBE and WBE are only applicable to entities, business, firms, etc.

16    **\*\*Known Section 3, MBE/WBE Entities**

Per the HUD database there are more than \_\_\_\_ Section 3, MBE and/or WBE certified Business Concerns and Entities listed with some design and/or consulting disciplines. A limited number are listed with Lynchburg mailing addresses. we will initially engage:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Exhibit A

**Section 3 Business Self-Certification**  
**Company Contact Information**

Company Name	
Street Address	
City, ST, ZIP Code	
Contact Name	
Phone	
E-Mail Address	

**The Business Concern “Applicant” must satisfy one of the following:**

\_\_\_\_\_ A majority 51% or more ownership of Applicant business shall be held by low to very-low income residents of the designated area.

\_\_\_\_\_ At Least 30% of the employees of the business are low to very-low income residents of the designated area.

\_\_\_\_\_ More than 25% of all contract work shall be performed by businesses that meet either of the criteria set forth in the two options above.

Please include information for all **owners** for the past calendar year.

	Name & Address of Owner	Social Security #	% Ownership	of Annual Income	# Household	In
1						
2						
3						
4						

List all **employees** currently employed by your business

	Name & Address of Employee	Social Security #	Employment Status	Annual Income	# Household	In
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

## SUBCONTRACTORS

List all work performed by businesses meeting the conditions of Section 3 Business Status:

	Name & Address of Business	Phone Number	Qualifying Condition	Total Award	Contract
1					
2					
3					
4					

### Previous HUD Funded Project

Please list all HUD funded projects this company has completed

Name of Project	Project location/Presiding Municipality

### Company Information

Please fill out the following information

Company Establishment Date:	
Type of Company (LLC, Corp., etc.):	
Has the company operated under another name?	
Is the company Minority Owned?	
Is the company Women Owned?	
General character of work the company performs:	
Business Federal Identification Number:	
Has the company defaulted on contracts? If so, please attach explanation:	



**Affidavit:**

By submitting this application, I affirm that the facts set forth in it are true and complete. I understand that if I am accepted as a Section 3 Business, any false statements, omissions, or other misrepresentations made by me on this application may result in immediate contract dismissal and/or debarment from future federally-funded projects. The Undersigned hereby authorizes and requests any person, firm or corporation to furnish any information requested by Woda Cooper Companies, Inc. in verification of the recitals comprising this \_\_\_ day of \_\_\_, 20\_\_.

Name of Contractor/Owner \_\_\_\_\_

Title \_\_\_\_\_

State of Ohio )  
)SS  
County of \_\_\_\_\_)

\_\_\_\_\_ being duly sworn, deposes and says that he/she is \_\_\_ of \_\_\_\_\_ and that the answers to the forgoing questions and all statements therein contained are true and correct.

Subscribed and sworn to before me this \_\_\_ day of \_\_\_, 20\_\_

Notary Public \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

Exhibit B

**SECTION 3 BUSINESS CERTIFICATION**

The undersigned bidder/contractor certifies as part of its bid or contract that it is a section 3 business as indicated below (check applicable box):

☐ Category 1 Business: A business that is owned 51% or more by Section 3 Residents.

☐ Category 2 Business: A business whose current full time employees, either temporary, seasonal or permanent, consist of at least 30% Section 3 Residents or whose current permanent, full time employees were Section 3 Residents when they were first hired and the period from the date they were first hired to the date of certification does not exceed three (3) years.

A Section 3 resident is defined as any low or very low income person residing within Montgomery County. Low income is defined at 80% of the area median income based on family size. Each bidder is required to consult with WCCI PM for income guidelines.

☐ Category 3 Business: A business that provides sufficient evidence to assure a commitment to subcontract more than 25% of the total dollar amount of all subcontracts to Section 3 Businesses.

☐ Is not a Section 3 Business.

\_\_\_\_\_

Business Name	Project	_____
Business Address	Certifying Signature	_____
Title	Date	_____





**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 7 Zoning**

1. Zoning Narrative
2. R-3 Zoning Ordinance
3. R-5 Zoning Ordinance



## Zoning

The property upon which Simms Pointe is located on is currently zoned R-3. This zoning designation permits multi-family apartments. Woda Cooper Development, Inc. ("Woda Cooper") and the current owner of the land submitted applications to the City of Harrisonburg Community Development to (1) amend the Comprehensive Plan's Land Use Guide map, (2) rezone the Property, and (3) obtain a special use permit.

The Applicant seeks a Comprehensive Plan Map Amendment to change the future land use from Limited Commercial to Mixed Use. A future land use designation of Mixed Use would permit up to 24 dwelling units per acre. Simms Pointe is intended to contain only residential uses, so the Applicant wishes to amend the Comprehensive Plan Map to designate the future land use as Mixed Use as the development will complement the adjacent commercial and residential uses. Simms Pointe will help the city of Harrisonburg meet the current and future needs of residents for affordable housing, one of the key goals of the Comprehensive Plan.

Simms Pointe Limited Partnership and Woda Cooper (the "Applicant") seek rezoning from R-3 to R-5 to permit a greater density. The zoning district of R-3 would allow up to 68 units on this parcel, while R-5 would permit up to 114 units. The increase in density will allow the Applicant to produce a more competitive application in their pursuit of the Section 42 tax credits. The Applicant seeks to conditionally zone this property, subject to a proffer statement. This conditionally zoned property will restrict occupancy and will condition a minimum of 1.5 parking spaces per dwelling unit.

The Applicant also seeks Special Use Permit 10-3-55.4(1) to permit multiple-family dwelling of more than twelve (12) units per building. Without the Special Use Permit, R-5 zoning would allow multiple-family dwellings with up to twelve (12) units per building. This Special Use Permit would allow the buildings to be constructed more efficiently and allow for a more efficient site layout. More efficient construction pricing will be beneficial to the Applicant in their application for the Section 42 tax credits.

The City of Harrisonburg Planning Commission voted in favor of the requests and to move the requests to the City Council. City Council will hear the Applicant's requests for re-zoning, the special use permit, and the amendment to the Comprehensive Plan map on March 9, 2022. The Applicant does not foresee any issues with obtaining a determination in its favor for the aforementioned items. Upon receiving a successful determination, the Applicant will provide HRHA with a zoning confirmation letter.

Included in this Tab are (1) the R-3 section of the zoning ordinance, which shows that multifamily dwellings are permissible in R-3 up to twelve (12) units per building, and (2) the R-5 section of the Zoning Ordinance which shows that Simms Pointe would comply with all zoning and permit regulations given the approval of the re-zoning and special use permit.



## ARTICLE J.2. - R-3 MEDIUM DENSITY RESIDENTIAL DISTRICT

This article will be effective August 14, 2010. To develop under the previous R-3 Multiple Dwelling Residential District, Comprehensive Site Plans must be approved before August 14, 2010.

(Ord. of 8-14-07)

### Sec. 10-3-48.1. - General.

The regulations set forth in this article or set forth elsewhere in this chapter where referred to in this article are the regulations for the "R-3" Medium Density Residential District.

(Ord. of 8-14-07)

### Sec. 10-3-48.2. - Purpose of district.

This district is intended for medium density residential development and other uses intended to respect the residential character which are aesthetically compatible with the district by means of architectural expression, landscaping and restrained traffic flow. Residential development includes single-family, duplex, townhouse units, and in special circumstances, multiple-family buildings. Nonresidential development may include institutional buildings such as colleges, universities, hospitals, medical and professional offices, nursing homes and charitable institutions. It is further intended that conversion from residential use to other permitted nonresidential uses be compatible with the character of the district. All nonresidential uses are subject to restrictions and requirements necessary to ensure compatibility with residential surroundings.

(Ord. of 8-14-07)

### Sec. 10-3-48.3. - Uses permitted by right.

The following uses are permitted by right:

- (1) Single-family dwelling units with limitations as required by area and dimensional regulations (section 10-3-48.5 below).
- (2) Duplex dwelling units with limitations as required by area and dimensional regulation (section 10-3-48.5 below).
- (3) Dwelling units may be occupied by a family or not more than four (4) persons, except that such occupancy may be superseded by building regulations.
- (4) Attached townhouses of not more than eight (8) units.
- (5) Home occupations, as defined.
- (6) Churches or other places of worship.
- (7) Public schools or a private school having a function substantially the same as a public school.
- (8) Other governmental uses, such as community centers, parks and playgrounds.
- (9) College and university buildings and functions, which are either owned or leased by such institutions, and

which may include fraternities and sororities.

- (10) Hospitals, convalescent or nursing homes, funeral homes, medical offices and professional offices as defined by article F.
- (11) Charitable or benevolent institutions.
- (12) Accessory buildings and uses clearly incidental to the above. Accessory uses incident to permitted nonresidential uses shall be located within principal buildings when such accessory function serves the public. Parking garages are permitted within the district.
- (13) Child day care.
- (14) Adult day care.
- (15) Private clubs and golf courses.
- (16) Cemeteries.
- (17) Public uses.
- (18) Community buildings for associated townhouse and multiple-family developments.
- (19) Small cell facilities. Wireless telecommunications facilities are further regulated by Article CC.
- (20) Homestays, as further regulated by Article DD.

(Ord. of 8-14-07; Ord. of 11-25-08(2); Ord. of 2-24-09(2); Ord. of 4-27-10(6); Ord. of 3-28-17(4); Ord. of 5-22-18(5); Ord. of 9-8-20(2))

#### Sec. 10-3-48.4. - Uses permitted only by special use permit.

The following uses are permitted by special use permit only:

- (1) Boarding and rooming houses, complying with conditions as defined under article B and limited in occupancy by one (1) person per designated bedroom unless otherwise specified within the special use permit.
- (2) Short-term rentals, as further regulated by article DD.
- (3) Reducing required parking areas to permit fewer than the required number of vehicle parking spaces for any use, provided that an amount of open space equal to the amount of space that would have been used for the required number of vehicle parking spaces is left available for parking in the event that, at the discretion of the city council, it is needed at some time in the future. Open space used for this purpose shall be so noted in the deed and shall not be used to meet any conflicting requirements of the zoning ordinance.
- (4) Concealed wireless telecommunications facilities, industrial microcells, distributed antenna systems, and macrocells. Telecommunications towers are not permitted, except towers primarily erected for the use of the Harrisonburg-Rockingham Emergency Communication Center up to two hundred (200) feet in height. Wireless telecommunications facilities are further regulated by article CC.
- (5) Personal service establishments, including, but not limited to barber shops, day spa, beauty parlors, and tanning salons. Parking requirements based on retail use designation.
- (6) Multiple-family dwellings of up to twelve (12) units per building under conditions set forth in subsection 10-3-48.6(e) and such other conditions deemed necessary by city council.

(7) Major family day home.

(8) Walls and fences greater than the height otherwise permitted, under such conditions as are deemed necessary by the city council.

(9) Public uses which deviate from the requirements of title 10, chapter 3.

(10) Community buildings (other than those permitted by right).

(Ord. of 8-14-07; Ord. of 11-25-08(2); Ord. of 4-28-09(5); Ord. of 5-26-09(2); Ord. of 4-26-11(4); Ord. of 1-8-13(4); Ord. of 9-23-14(4); Ord. of 7-28-15(9); Ord. of 3-28-17(5); Ord. of 8-22-17(6); Ord. of 3-26-19(1))

Sec. 10-3-48.5. - Area and dimensional regulations.

Except as provided in article T, and as required in article CC for wireless telecommunication facilities, the following area and dimensional regulations shall apply:

	MINIMUM FEET					MAXIMUM	
Lot Area Sq. Ft.	*Lot Width	Lot Depth	Front Yard	**Side Yard	Rear Yard	Stories	Height Feet
Single-family: 6,000	60	100	30	10	20	3	35
Duplex: 4,000/unit	30/unit	100	30	10	25	3	35
Multifamily: 3,000/unit	60	100	30	10	25	3	40
Multifamily Quadrplex: 12,000/building, 3,000 sq. ft./unit	60 ft./4-unit building, 30 ft./individually subdivided lot	100	30	10	25	3	40
Townhouse: 2,000/unit	18	112	30	10	25	3	40
Other uses: 6,000	60	100	30	10	25	3	40

\*Measured at point of required front setback line.

\*\*See special regulations for attached multifamily dwellings and townhouses in article E.

Sec. 10-3-48.6. - Other regulations.

- (a) Attached or detached private radio and television antennas, including dish antennas, shall not exceed the maximum height otherwise permitted in this district and shall not be permitted in front yards.

*Exception:* Private amateur radio antennas intended for public service and emergency use may exceed the height otherwise established so long as the height is justified for proper radio communications.

- (b) Off-street parking regulations for all buildings and uses permitted in this district are governed by article G. When an off-street parking lot containing five (5) or more spaces is to be constructed within an established single family detached or duplex neighborhood, such parking lot(s) shall not be located between principal buildings and a public street, unless the parcel has multiple public street frontages, and shall be screened from the public street(s) by principal buildings or by landscaping or walls. When an off-street parking garage containing five (5) or more spaces is to be constructed within an established single family detached or duplex neighborhood, such parking garage shall be located to the rear or side of principal buildings and screened from the public street(s) by principal buildings or by landscaping or walls. The parking garage cannot be located between principal buildings and public streets. Where such parking lots/garages abut single-family detached or duplex lots, they shall be screened from such lots by landscaping, fences, or walls. An adequate screen shall be a minimum five-foot wide buffer area containing the following:

Screen Abutting Street	Screen Abutting Adjacent Lot
4-foot high masonry wall	6-foot high masonry wall or solid wood fence
Or	Or
Evergreen hedge of 4-foot high (ultimate height) shrubs or trees planted a minimum of 5 feet on center so as to form a dense screen	Evergreen hedge of 6-foot high (ultimate height) shrubs or trees planted a minimum of 5 feet on center so as to form a dense screen

An established single-family detached or duplex neighborhood is defined as one (1) meeting at least one (1) of the following conditions:

- (1) A single-family house or duplex is located on at least one (1) side, not rear, of the lot containing the parking lot/garage, or
- (2) At least fifty (50) percent of the lots along both sides of the street within the same block as the parking lot/garage are occupied by single-family houses or duplexes.

- (c) More than one (1) principal building may be constructed upon an unsubdivided parcel of land as density allows open space between each building as measured at the closest point between building walls shall not be less than twenty (20) feet. The minimum separation between buildings may be superseded by building regulations. The façade of each principal building shall face a dedicated public street or the limits of a private parking unit (as defined) and no building shall have the rear façade facing a dedicated public street, unless the parcel has multiple public frontages where rear façades may front one (1) public street.
- (d) Proposed building projects as permitted in this district, which rely on private refuse collection, shall provide a designated point of collection with appropriate facilities. Said facilities shall be screened and shall meet the requirements for accessory buildings per section 10-3-114.
- (e) Multiple-family development special use permits may be approved if the following conditions as determined by city council are met:
- (1) Existing multiple-family development, or land planned for multiple-family development according to the Land Use Guide in the Comprehensive Plan, is located adjacent to across the street from, or in close proximity to the proposed multiple-family development.
  - (2) The applicant has demonstrated that adequate vehicular, transit, pedestrian and bicycle facilities:
    - Currently serve the site; or
    - Are planned to serve the site according to a city or state plan with reasonable expectation of construction within the timeframe of the need created by the development; or
    - Will be provided by the applicant at the time of development; or
    - Are not needed because of the circumstances of the proposal.
  - (3) The applicant has demonstrated that the proposed multiple-family development's design is compatible with adjacent existing and planned single-family, duplex and townhouse development. Compatibility may be achieved through architectural design, site planning, landscaping and/or other measures that ensure that views from adjacent single-family, duplex and townhouse development and public streets are not dominated by large buildings, mechanical/electrical and utility equipment, service/refuse functions and parking lots or garages.
  - (4) The applicant has shown that the site is environmentally suitable for multiple-family development. There shall be adequate area within the site, or the development shall be designed, to accommodate buildings, roads and parking areas with minimal impact on steep slopes and floodplains.
- (f) Any conforming uses established under the R-3 regulations that existed prior to August 14, 2010, shall not be considered nonconforming and may continue to meet those prior R-3 regulations. Legally established multiple-family residential developments meeting the prior R-3 regulations shall not be required to obtain a special use permit.

(Ord. of 8-14-07; Ord. of 3-22-11(2); Ord. of 1-14-14(5); Ord. of 7-28-20(2))



## ARTICLE K.2. - R-5 HIGH DENSITY RESIDENTIAL DISTRICT

### Sec. 10-3-55.1. - General.

The regulations set forth in this article or set forth elsewhere in this chapter where referred to in this article are the regulations for the "R-5" High Density-Residential District.

(Ord. of 4-24-07)

### Sec. 10-3-55.2. - Purpose of district.

This district is intended for medium to high density residential development, including townhouses and multiple-family dwelling units, together with certain governmental, educational, religious, recreational and utility uses. Vehicular, pedestrian and bicycle transportation is facilitated through a connected system of roads, sidewalks and shared use paths, so as to provide many choices with regard to mode and route, and to provide a safe and comfortable pedestrian environment that promotes walkability for residents and visitors.

(Ord. of 4-24-07; Ord. of 3-13-12(12))

### Sec. 10-3-55.3. - Uses permitted by right.

The following uses are permitted by right:

- (1) Townhouses of not more than eight (8) units per building.
- (2) Multiple-family dwellings of not more than twelve (12) units per building.
- (3) Dwelling units may be occupied by a family or not more than four (4) persons, except that such occupancy may be superseded by building regulations.
- (4) Community buildings for associated townhouse and multiple-family residential developments.
- (5) Public and private schools.
- (6) Child day care.
- (7) Adult day care.
- (8) Churches.
- (9) Parks.
- (10) Public uses.
- (11) Accessory buildings and uses clearly incidental to the above. Accessory uses incidental to permitted nonresidential uses shall be located within principal buildings when such accessory

function serves the public. Parking garages are permitted within the district.

(12) Home occupations.

(13) Small cell facilities. Wireless telecommunications facilities are further regulated by Article CC.

(14) Homestays, as further regulated by Article DD.

(Ord. of 4-24-07; Ord. of 3-24-09(2); Ord. of 5-22-18(7); Ord. of 3-26-19(1); Ord. of 9-8-20(2))

Sec. 10-3-55.4. - Uses permitted by special use permit.

The following uses are permitted by special use permit only:

(1) Multiple-family dwellings of more than twelve (12) units per building.

(2) Multiple-family buildings greater than four (4) stories and/or fifty-two (52) feet height.

(3) Private clubs and golf courses.

(4) Retail stores, convenience shops, personal service establishments, restaurants (excluding those with drive-through facilities), and business and professional offices under conditions set forth in subsections 10-3-55.6(f) and (g) and such other conditions deemed necessary by city council.

(5) Walls and fences greater than the height otherwise permitted, under such conditions as are deemed necessary by the city council.

(6) Reducing required parking areas to permit fewer than the required number of vehicle parking spaces for any use, provided that an amount of open space equal to the amount of space that would have been used for the required number of vehicle parking spaces is left available for parking in the event that, at the discretion of the city council, it is needed at some time in the future. Open space used for this purpose shall be so noted in the deed and shall not be used to meet any conflicting requirements of the zoning ordinance.

(7) Public uses which deviate from the requirements of title 10, chapter 3.

(8) Concealed wireless telecommunications facilities, industrial microcells, distributed antenna systems, and macrocells. Telecommunications towers are not permitted, except for towers primarily erected for the use of the Harrisonburg-Rockingham Emergency Communications Center up to two hundred (200) feet in height. Wireless telecommunication facilities are further regulated by article CC.

(9) Short-term rentals, as further regulated by article DD.

(Ord. of 4-24-07; Ord. of 4-26-11(6); Ord. of 1-8-13(7); Ord. of 9-23-14(6); Ord. of 7-28-15(13); Ord. of 7-25-17(1); Ord. of 8-22-17(8); Ord. of 8-22-17(9); Ord. of 3-26-19(1); Ord. of 4-27-21)

Sec. 10-3-55.5. - Area and dimensional regulations.

Except as provided in article T, and as required in article CC for wireless telecommunication facilities, the following area and dimensional regulations shall apply:

	MINIMUM FEET					MAXIMUM	
Lot Area Sq. Ft.	*Lot Width	Lot Depth	Front Yard	**Side Yard	Rear Yard	***Stories	***Height
Multifamily: 1,800/unit	60	100	10	10	25	4	52
Multifamily Quadrplex: 12,000/building, 3,000 sq. ft./unit	60 ft./4-unit building, 30 ft./individually subdivided lot	100	10	10	25	3	40
Townhouse: 2,000/unit	18	112	10	10	25	3	40
Other uses: 6,000	60	100	10	10	25	3	40

\*Measured at the point of required front setback line.

\*\*See special regulations for attached multifamily dwellings and townhouses in article E.

\*\*\*The maximum number of stories and/or height of multifamily buildings may be increased by special use permits as set forth in subsection 10-3-55.4(2).

(Ord. of 4-24-07; Ord. of 11-25-08(2); Ord. of 3-13-12(13)Ord. of 7-28-15(14))

Sec. 10-3-55.6. - Other regulations.

(a) Attached or detached private radio and television antennas, including dish antennas shall not

exceed the maximum height otherwise permitted in this district and shall not be permitted in front yards.

*Exception:* Private amateur radio antennas intended for public service and emergency use may exceed the height otherwise established so long as the height is justified for proper radio communications.

- (b) Off-street parking regulations for all buildings and uses permitted in this district are governed by article G.
- (c) More than one (1) principal building may be constructed upon an unsubdivided parcel of land as density allows. The open space between each building as measured at the closest point between building walls shall not be less than ten (10) feet. The minimum separation between buildings may be superseded by building regulations. The front facade of each principal building shall face a dedicated public street or the limits of a private parking unit (as defined) and no building shall have the rear facade facing a dedicated public street.
- (d) Proposed building projects as permitted in this district, which rely on private refuse collection, shall provide a designated point of collection with appropriate facilities. Said facilities shall be screened and shall meet the requirements for accessory buildings per section 10-3-114.
- (e) Reserved.
- (f) Uses listed in subsection 10-3-55.4(4) shall be integrated into the residential community so as to not adversely affect local traffic patterns and levels and views from surrounding residential areas and public streets. Such integration shall be achieved through effective site planning, compatible architectural design, and landscaping and screening of parking lots, utilities, mechanical/electrical/telecommunications equipment and service/refuse functions. Buildings shall be residential in design and scale with floorplates not exceeding seven thousand five hundred (7,500) square feet.
- (g) Mixed use buildings comprised of nonresidential uses listed under subsection 10-3-55.4(4) and multiple-family dwellings are permitted by special use permit. An area of the building up to the entire first floor may be devoted to nonresidential uses, whatever the size of the building floorplate. The multiple-family dwelling units within mixed use buildings shall be included in the total number of dwelling units in the development and therefore in the calculation of the density for the development. The maximum total number of stories and maximum height of mixed use buildings shall be the same as for buildings comprised entirely of multiple-family dwellings. The standards of subsection (f) shall apply to mixed use buildings, except for the limitations on maximum floorplate.

(Ord. of 4-24-07; Ord. of 3-13-12(14); Ord. of 1-14-14(7); Ord. of 4-27-21)







**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 9 Tenant Selection Criteria**

# **Simms Pointe**

**Woda Management and Real Estate, LLC  
Managing Agent**

## **Affordable Housing Tax Credit Property**

### **TENANT SELECTION PLAN**

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Throughout this document, the above named Rental Housing will be referred to as the "PROPERTY".

## **I. FAIR HOUSING AND EQUAL OPPORTUNITY REQUIREMENTS**

It is the policy of the Property, to comply fully with Title VI of the Civil Rights Act of 1964, Title VIII and Section 3 of the Civil Rights Act of 1968 (As amended by the Community Development Act of 1974), Executive Order 11063, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, the Fair Housing Amendments Act of 1988, the Violence Against Women Act (VAWA), and any legislation protecting individual rights of residents, applicants or staff which may subsequently be enacted. These practices apply to policies and procedures when accepting and processing applications, selecting tenants from a waiting list, assigning rental housing, certifying and re-certifying eligibility for assistance.

The Property shall not discriminate because on race, color, national origin, religion, sex gender identity (including gender expression), sexual orientation, disability, age, marital status, height and weight, family/parental status, income derived from public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity. The Property shall not:

- 1) Deny to any applicant the opportunity to apply for housing, nor deny to any eligible applicant the opportunity to lease housing suitable to their needs.
- 2) Provide housing, which is different than that provided to others;
- 3) Subject a person to segregation to disparate treatment;
- 4) Restrict a person's access to any benefit enjoyed by others in connection with the housing program;
- 5) Treat a person differently in determining eligibility or other requirements for admission;
- 6) Deny a person access to the same level of services.

The Property shall not automatically deny admission to a particular group or category of otherwise eligible applicants. Each applicant in a particular group or category will be treated on an individual basis in the normal processing routine.

The Property will seek to identify and eliminate situations or procedures, which create a barrier to equal housing opportunity for all. In accordance with Section 504, the Property will make a reasonable accommodation for individuals with handicaps or disabilities (applicants or residents). Such accommodations may include changes in the method of administering policies, procedures, or services. In addition, the Property may perform a structural modification to housing and non-housing facilities on site where such modifications would be necessary to afford full access to the housing program for qualified individuals with handicaps.

In reaching a reasonable accommodation with, or performing structural modifications for, otherwise qualified individuals with a disability, the Property is NOT required to:

- 1) Make Structural alterations that require the removal or altering of a load-bearing structural member.
- 2) Provide an elevator in any multifamily housing project solely for the purpose of location of accessible rental housing above or below the grade level;
- 3) Provide support services that are not already part of its housing programs;
- 4) Take any action that would result in a fundamental alternation in the nature of the Program;

- 5) Take any action that would result in an undue financial and administrative burden on the Property.

## **II. PRIVACY POLICY**

It is the policy of the Property to guard the privacy of individuals, to concur with the Federal Privacy Act of 1974, and to ensure the protection of such individual's records maintained by the Property.

Therefore, neither the Property nor its agents shall disclose any personal information obtained in its records to any person or agency unless the individual about whom information is requested has given written consent for such disclosure.

This privacy policy in no way limits the Property's ability to collect such information as it may deem necessary to determine eligibility, compute rent, or determine an applicant's suitability for tenancy.

Consistent with the intent of Section 504 of the Rehabilitation Act of 1973, any information obtained on handicap or disability will be treated in a confidential manner.

### **Compliance with Requirements Outlined in the Violence Against Women Act**

Property managers understand that, regardless of whether state or local laws protect victims of domestic violence, rape, dating violence, sexual assault or stalking, people who have been victims of violence have certain rights under the Violence Against Women Act. If any applicant wishes to exercise the protections provided in the VAWA, he/she should contact the owner/agent immediately. The owner/agent is committed to ensuring that the Privacy Act is enforced in this and all other situations.

The owner/agent will not assume that any act is a result of abuse covered under the Violence Against Women Act. In order to receive the protections outlined in the VAWA, the applicant/resident must specify that he/she wishes to exercise these protections.

## **III. QUALIFYING FOR ADMISSION**

Based on its Restrictive Covenant and Funding Agreements for affordable housing programs (Program), the property may not admit ineligible applicants. Only the following applicants will be admitted:

- 1) Individuals
- 2) Those who qualify as a family, defined as;
  - a. Two or more persons living together, whose income and resources are available to meet the households needs and who are related by blood, marriage, adoption, guardianship or operating of law; or, have evidence of a stable relationship; or
  - b. A single individual with no children who is pregnant at the time of admission or in the process of securing legal custody of any individual under 18 years of age; or

- c. Other persons, including foster children, Live-In Aides, and members temporarily absent, may be considered as part of the family group if they are living or will live regularly with the applicant.
- 3) Those whose annual income at the time of admission does not exceed the HUD-Income limit appropriate for the family size. 60% of the Area Median Gross Income is the highest income limit for which this property is required to rent a specified number of rental housing to tenants who are at or below the guideline. The minimum annual income must be at least 2.5 times the annual rental rate in order to demonstrate ability to pay living expenses. Applicants who have rental subsidy or rental assistance would be exempt from this minimum income requirement. Additional units may be available at a higher income level.
- 4) All household members must verify a Social Security number, tax identification numbers or an Alien Registration number. If there is a newborn in the house with a pending number, the applicant will be admitted and the file updated when the number is available.
- 5) Applicants who are full time students must meet at least one of the following criteria:
  - a. The household will not be comprised of all full time students.
  - b. At least one student is receiving assistance under Title IV of the Social Security Act (i.e. TANF)
  - c. At least one student was an orphan or previously under the care and placement responsibility of the state agency responsible for administering foster care or a ward of the court through the age of 18.
  - d. At least one student participates in a program receiving assistance under the Job Training Partnership Act, Workforce Investment Act, or under other similar federal, state or local laws.
  - e. At least one student is a single parent with a child(ren) and this parent is not a dependent of another individual and the child(ren) is/are not dependents of someone other than the other (or absent) parent.
  - f. At least one student is married and entitled to file a joint tax return.

- 6) Who meet or exceed the Resident Selection Criteria set forth in these policies.

Being eligible however, is not an entitlement to housing. The resident selection criteria is used to demonstrate the applicant's suitability as a resident using verified information on past behavior to document the applicant's ability, either alone or with assistance, to comply with essential lease provisions and any other rules governing tenancy.

The applicant will be judged on past habits and practices related to tenancy and not on any attribute or behavior which may be imputed to a particular group or category or persons of which an applicant may be a member.

#### **IV. WAITING LIST PROCEDURE**

##### **When Applications Will Be Accepted**

- 1) During office hours. Applications will not be considered accepted until they are presented to the property manager. All applications will be date and time stamped and will be added to the wait list in the order accepted. Applicants will be added to wait lists by bedroom size, preferences and need for a barrier free unit. Applications are available on the Woda website and in boxes outside the rental office for the convenience of our applicants when



the office is closed. Applications will be processed from the waiting list for housing on a first come first serve basis.

#### Internal Waiting List

- 1) If an existing resident should have a change in circumstances that necessitates a move to a different unit size or a unit with accessible or adaptable features, they will be placed on an internal wait list and given priority for the next available unit. If a grant or program preference does not allow for the internal assignment of a designated unit, that unit will be assigned to applicants who are processed from the preference wait list.
- 2) Existing residents who qualify for a different rent restriction, and the units “float” meaning the restrictions can be moved between units, will be given a restriction swap if the swap is approved by the compliance department through the management agent’s corporate office. Unit swaps cannot be completed by the on-site manager.

#### Application Fees

\_\_\_\_\_ No application fee is charged for this community

X An application fee of \$35.00 is charged per applicant for this community. The application fee does not exceed the actual cost of the property of the credit report, criminal history report and landlord references.

#### Opening and Closing Waiting List

- 1) In order to maintain a balanced application pool, the Property may, at its discretion, suspend applicant taking, and close the waiting lists in whole or in part. Property will also update the waiting list and remove the names of those who are no longer interested in or no longer qualify for the affordable housing program(s) offered at this Property.
- 2) If the Property has sufficient applications, it may elect to:
  - a. Close the waiting list completely;
  - b. Close the list during certain times of the year; or
  - c. Restrict intake by preferences or priority. Decisions about closing the waiting list will be based on the number of applicants available for a particular size and type of rental housing, and the ability of the Property to house an applicant in appropriate rental housing within a reasonable period of time. Closing the waiting list, restricting intake, or opening the waiting lists will be posted at the Property office.
- 3) During the period when the waiting list is closed, the Property will **not** maintain a list of individuals who wish to be notified when the waiting list is reopened, advertising will be done in accordance with the Affirmative Fair Housing and Marketing Plan to include newspaper and on-line notifications. Also, the date the wait list will be posted at the rental office.

#### Determining if the Waiting List may be Closed

- 1) Property will use its Procedure on Waiting List Closure to determine whether the waiting list may be closed

#### Choosing Rental Housing Size

- 1) When it has been determined that an applicant is to be added to the “Waiting List” the head of household must declare the size of rental housing desired. An applicant may qualify for more than one size rental unit. The Property will not dictate the size of rental housing requested. The Property’s maximum occupancy guidelines are:
  - a. Two (2) persons per bedroom depending upon the size of the housing being applied for and subject to applicable housing, health and safety codes.
  - b. It is assumed (unless otherwise documented) that persons with an established relationship as necessary to qualify as a family, (see Qualifying for Admission, in this document) may share a bedroom. No management standards such as those described below will be used to mandate the assignment of particular size rental housing:
    - 1) Children of opposite sex
    - 2) Children whose age is more than five years apart
    - 3) Adult children, i.e. over the age of eighteen

#### Change in Preferences Status While on the Waiting List

- 1) Occasionally families on the waiting list who did not qualify for a Preference when they applied will experience a change in circumstances that qualifies them for a Preference. In such cases, it will be the applicant’s duty to contact the Property so that their change in status may be verified to reflect the Preference. Preferences are detailed in Paragraph VI – Preferences and Resident Selection of this document.

#### Removal of Applicants from the Waiting List:

- 1) In the event there has been no rental housing turnovers the Property staff will update the waiting list every six (6) months. Property will not remove an applicant’s name from the waiting list unless:
  - a. The applicant requests that their name be removed; or
  - b. The applicant was clearly advised of the requirement to tell the Property of his/her continued interest in a rental unit; or
  - c. Property made a reasonable effort to contact the applicant to determine if there is continued interest in housing but has been unsuccessful; or
  - d. Property has notified the applicant of its intention to remove the applicants name because the applicant is no longer qualified.

As applicants approach the top of the waiting list, they will be contacted to update their application. If several applications are being processed in anticipation of upcoming vacancies, the applicant will be informed of their place in line for an upcoming unit or units.

### **V. PREFERENCES AND RESIDENT SELECTION**

It is the Project’s policy that a preference does not guarantee admission. Every applicant must meet the Property’s Resident Selection Standards before being accepted as a resident.

Preferences will be granted to applicants who are otherwise eligible and who, at the time, are certified for admission and satisfy the definition requirements of the preferences described below.

Restrictions for this property are:

**10% (8 units) affordable at 30% AMGI**  
**19% (15 units) affordable at 40% AMGI**  
**21% (17 units) affordable at 50% AMGI**  
**11% (9 Units) affordable at 70% AMGI**  
**39% (31 Units) affordable at 80% AMGI**

Grant Preferences for Admission

- 1) Preferences for admission shall be granted to applicants whose circumstances at the time of certification comply with requirements as stated in a Grant, which has been utilized in the development or purchase of the property.

Funding Preferences for Admission

- 1) Preferences for admission shall be granted to applicants whose circumstances at the time of certification comply with requirements as stated in a Restrictive Covenant, which has been utilized in the development or purchase of the property.
- 2) Applicants with Grant or Funding Preferences must be admitted before applicants without Grant or Funding Preferences except when there are no applicants with Grant or Funding Preferences. Verification of Grant or Funding Preferences shall be in accordance with guidelines established elsewhere in this document.

Preferences for Accessible or Adaptable Rental Housing

- 1) For rental housing accessible to or adaptable for persons with mobility, visual or hearing impairments, households containing at least one person with such impairment will have first priority, (as applicable for particular rental housing features). NOTE: Current residents in good standing requiring accessible/adaptable rental housing shall be given priority over applicants requiring the same type of rental housing. Where no such applicants or current residents are at hand, management reserves the right to hold such rental housing available while outreach efforts are in process to obtain applicants with need for such rental housing. Where non-handicapped persons are moved into rental housing designed to meet special needs, they shall do so only after signing a lease addendum agreeing to move to a rental housing with no such design features should an applicant or current residents require an accessible rental housing of the type currently occupied by the non-handicapped person.
- 2) Applicants will be given specific income limit information as well as preference information when they contact the on- site rental office to inquire about available housing. Applicants are encouraged to submit an application and submit to the income verification process in order to be certain that they qualify.
- 3) If a unit becomes available that carries a rent restriction or income restriction that can be swapped with another unit in order to qualify a resident who, under the new restriction would qualify, the corporate level compliance specialist will make the change to accommodate the resident or applicant. Under no circumstances will a site level manager

be permitted to change the status of a unit. This unit status swap only applies to units that float under the guidelines of the program.

## **VI. VERIFICATION REQUIREMENTS**

Property shall obtain verification in compliance with requirements set forth in Exhibit 3-2, Acceptable Forms of Verification, of the HUD Handbook 4350.3 and the MSHDA required forms. No decision to accept or reject an applicant shall be made until all verifications, key to the application form have been collected and any necessary follow-up interview has been performed.

### **Interviews and Verification Process**

The following items will be verified to determine eligibility and suitability for admission to the Property based on information supplied by the applicant on a checklist and application:

- 1) Program Specific Eligibility Information
- 2) Annual Income
- 3) Assets and Asset Income
- 4) Program Preferences
- 5) Social Security Numbers, and Birth Certificates of all family members
- 6) Verification of immigration status
- 7) Photo ID for anyone over the age of 18
- 8) Student status
- 9) Credit report supplied by Amrent Report
- 10) Landlord References supplied by Amrent
- 11) Criminal background Check supplied by Amrent through a national database
- 12) National Sex Offender Registry search supplied by Amrent

All the above information must be documented and appropriate verification forms or letters placed in the applicants or residents file.

Income, Assets, family composition and other Program parameters used to determine eligibility will be computed in accordance with the definitions and procedures established in Federal law and set forth in the applicable HUD and state housing finance agency regulations.

### **Period for Income Eligibility Verification**

- 1) Only verified income and asset information that is less than 120 days old may be used for certification. Verified information not subject to change (such as a person's date of birth) need not be re-verified. Information obtained which is subject to change, and for which verifications are more than 120 days old, must be re-verified.
- 2) Management staff will be the final judge of the credibility of any verification submitted by an applicant. If staff considers documentation to be doubtful, it will be reviewed by their Supervisor who will make a ruling about its acceptability. Staff will continue to pursue credible documentation until it is obtained or the applicant is rejected for failing to produce it.

### Attempted Fraud

Any information provided by the applicant, that verification proves to be untrue may be used to disqualify the applicant on the basis of attempted fraud. The Property considers false information about the following to be grounds for rejecting an applicant:

- 1) Income, assets, family composition
- 2) Social Security Numbers
- 3) Grant or Funding Preferences
- 4) Previous criminal history
- 5) Previous landlord history
- 6) Previous credit history

“Unwitting errors” that do not secure an advantage with regard to program eligibility, preference, or rent will not be used as a basis to reject applicants.

### Verifying Annual Income

- 1) Projections of Annual Income shall be based on the best available information considering 12-month anticipated income, current income rate and effective date, anticipated changes in income; these shall include estimates for each income recipient in the family group.
- 2) The income of irregular workers will be estimated on the basis of the best information available, considering earning ability, work history and annual tax returns where available.
- 3) Overtime income will be computed in accordance with verification obtained from the employer
- 4) When a resident or applicant reports zero income, the manager will note cash expenditures such as, car, telephone, utilities and/or other evidence of cash expenditures. The applicant or resident will be asked to explain the source of income supporting such expenditures on a zero income self-certification form.
- 5) Income is the most important factor in determining an applicant’s eligibility. The Property has established methods of verifying income, which includes:
  - a. Written third-party verification (with an appropriated release) through an employer or public agency.
  - b. Review and copies of documentation provided by the applicant such as:
    - \* Social security award letters
    - \* Pay stubs
    - \* Income tax forms
    - \* W-2 forms, or 1099’s
    - \* Investment, annuity or retirement account statements
  - c. In the absence of any of the above, notarized self-affidavits from the applicants describing the amount and type of income are acceptable documentation.

## **VII. VICTIMS OF DOMESTIC VIOLENCE, DATING VIOLENCE, SEXUAL ASSAULT AND STALKING (All Units):**



- A. Existing state laws may prohibit a landlord from denying admission to a person simply because she/he has been a victim of domestic violence, dating violence, sexual assault or stalking. If a person is a victim of domestic violence, dating violence, sexual assault or stalking, it might not be good cause for evicting the victim of that violence. A landlord, however, may be able to evict an individual based on the domestic violence against her/him if it can be proven there is an “actual and imminent threat” to other tenants or staff, if she/he is not evicted. In addition, an individual cannot be denied a housing voucher simply because she/he has been a victim of domestic violence, dating violence, sexual assault or stalking, nor can the landlord evict her/him for this reason, unless the landlord can show that there is an “actual and imminent threat” to the other tenants or staff if she/he is not evicted. [If a property has a layering of federal funding, the laws might protect victims of domestic violence, dating violence, sexual assault or stalking, as well as their immediate family members generally, from being evicted or being denied housing assistance if an incident of violence [that] is reported and confirmed. The law might provide that an incident of actual or threatened domestic violence, dating violence, sexual assault or stalking, does not qualify as a serious or repeated violation of the lease nor does it constitute good cause for terminating the assistance, tenancy, or occupancy rights of the victim. Furthermore, criminal activity directly relating to domestic violence, dating violence, or sexual assault is not grounds for terminating the victim’s tenancy. Owner/Agents (O/A) may bifurcate (divide a lease as a matter of law) in order to evict, remove, or terminate the assistance of the offender while allowing the victim, who is a tenant or lawful occupant, to remain in the unit.]
- B. A tenant may notify the landlord that she/he is a victim and intends to terminate their tenancy. A notice to terminate a tenancy under the law shall be in writing, with one of the following attached to the notice:
1. a copy of a temporary restraining order or a lawfully-issued emergency protective order that protects the tenant or household member from further domestic violence, dating violence, sexual assault or stalking;
  2. a copy of a written report by a peace officer employed by a state or local law enforcement agency acting in his/her official capacity, stating that the tenant or household member has filed a report alleging that she/he or the household member is a victim of domestic violence, dating violence, sexual assault or stalking; and/or
  3. other written documentation from a qualified third-party of the acts constituting domestic violence, dating violence, sexual assault or stalking. The notice to terminate the tenancy shall be given within 60 days of the date that any order described above was made, or with the time period described in a Family/Penal/Code of Civil Procedure Section(s). If the notice to terminate the tenancy is provided to the landlord under this Section, the tenant shall be responsible for payment of rent for 30 days following the giving of the notice, or within the appropriate period as described in the Family/Penal Code of Civil Section(s), and thereafter shall be released from any rent payment obligation

under the rental agreement without penalty. Existing law governing the security deposit shall apply.

- C. The landlord might be required to change the locks, as defined, within 24 hours of a written request, as specified, when the restrained person is not a tenant of the same dwelling unit. The restrained person who has been excluded from a dwelling unit might remain liable under the lease with all other tenants of the dwelling unit for rent as provided by the lease. The landlord, under specified circumstances, might also be required to change the locks when the restrained person is a tenant of the same dwelling unit.

If the landlord does not change the locks within 24 hours, the protected tenant might be able to change the locks without the landlord's permission.

- D. **Definitions** – The following definitions are provided as assistance in understanding and implementing the Violence Against Women Act (VAWA) protections. The definitions for domestic violence, dating violence, sexual assault, or stalking and immediate family member have been incorporated into the United States Housing Act.

**Domestic Violence** includes felony or misdemeanor crimes of violence committed by a current or former spouse of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabited with the victim as a spouse, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction.

**Dating Violence** means violence committed by a person: (A) who is or has been in a social relationship of a romantic or intimate nature with the victim, and (B) where the existence of such a relationship shall be determined based on a consideration of the following factors: (i) the length of the relationship; (ii) the type of relationship; and (iii) the frequency of interaction between the persons involved in the relationship.

**Sexual Assault** means any proscribed by chapter 109A of Title 18, whether or not the conduct occurs in the special maritime and territorial jurisdiction of the United States or in a Federal prison and includes both assaults committed by offenders who are strangers to the victim and assaults committed by offenders who are known or related by blood or marriage to the victim.

**Stalking** means (A)(i) to follow, pursue, or repeatedly commit acts with the intent to kill, injure, harass, or intimidate another person; or (ii) to place under surveillance with the intent to kill, injure, harass, or intimidate another person; and (B) in the course of, or as a result of, such following, pursuit, surveillance, or repeatedly committed acts, to place a person in reasonable fear of the death of, or

serious bodily injury to, or to cause substantial emotional harm to (i) that person; (ii) a member of the immediate family of that person; or (iii) the spouse or intimate partner of that person.

**Affiliated Individual** means, with respect to a person: (a) a spouse, parent, brother, sister, or child of that person, or an individual to whom that person stands in the place of a parent to a child (for example, the affiliated person is a child in the care, custody, or control of that individual); or (B) any individual, tenant, or lawful occupant living in the household of that person.

**Bifurcate means** to divide a lease as a matter of law so that certain tenants can be evicted or removed while the remaining family members' lease and occupancy rights are allowed to remain intact.

D. Confidentiality of Information Received from Victims of Domestic Violence, Dating Violence, Sexual Assault or Stalking – O/As responding to an incident of actual or threatened domestic violence, dating violence, sexual assault or stalking that could potentially have an impact on a tenant's participation in.

Alternately, in lieu of the certification form or in addition to it, O/As may accept a) a federal, state, tribal, territorial, or local police record or court record or b) documentation signed and attested to by a professional (employee, agent or volunteer of a victim service provider, an attorney, medical personnel, etc.) from whom the victim has sought assistance in addressing domestic violence, dating violence or stalking, or sexual assault or the effects of the abuse. The signatory attests to his/her belief that the incident in question represents bona fide abuse, and the victim of domestic violence, dating violence or stalking, or sexual assault has signed or attested to the documentation.

E. It is possible for someone lawfully occupying the unit, who is also a victim, to be evicted or removed from the home. If the victim commits separate criminal activity, a landlord may evict them for engaging in crime. Furthermore, if a victim poses "an actual and imminent threat to other tenants or those employed at or providing service to the property," they could be evicted, despite domestic law protections. Of paramount consideration is that the landlord may not hold the victim to a more demanding standard than other tenants.

## **VIII. APPLICANT SCREENING**

### **The Applicant Screening Policy:**

All applicants for tax credit housing will be screened according to the criteria set forth in this Resident Selection Plan. These criteria, which are based on those set forth in the State Housing Finance Agency Compliance Guidelines, HUD Handbook 4350.3 and Woda Management & Real Estate, LLC Policy and Procedure Manual, the following shall be considered;

- 1) Meeting the maximum and minimum income criteria;
- 2) Household size meets occupancy standards for available unit;
- 3) Past performance in meeting financial obligations;

- 4) A record of disturbance of neighbors, destruction of property, living or housekeeping habits at prior residence, which may adversely affect the health, safety or welfare of other residents, or cause damage to the rental housing or development;
- 5) Involvement in criminal activity on the part of any applicant family member which would reasonably be expected to have a detrimental effect on other tenants, the environment of the apartment community, or where an applicant's history would evidence an inability to comply with lease terms or a likelihood of interfering with management staff;
- 6) Household members who are on the state sex offender registry will be denied housing.
- 7) A record of eviction from housing or termination from residential programs;
- 8) An applicant's ability and willingness to comply with the terms of the Property's lease.
- 9) An applicant's misrepresentation of any information related to eligibility, award of preference for admission, family composition or rent.

#### Credit Reports

The Property will run a credit report on all applicants through Amrent who pulls from credit reporting agencies. The Amrent report will give records of eviction or judgments against the applicant. If the credit report reveals information upon which the applicant is rejected for housing, an Adverse Action letter is sent identifying the contact information for Amrent in order to appeal or correct reported information. The purpose of this report is to obtain information on the applicant's history of meeting financial obligations and future ability to make timely rent payments and utility payments. Credit reports will be used to screen based on the following criteria:

- 1) Student loans, medical expenses or non-essential utilities do not count.
- 2) Foreclosures are not considered an automatic rejection
- 3) Anyone with bankruptcy on their credit report must show proof of discharge for Chapter 7 and proof of confirmation for Chapter 13.
- 4) Unpaid rent to former landlords and public housing authorities are an automatic denial unless paid in full or a payment arrangement is made that is verified by and satisfactory to the landlord or PHA.
- 5) Utility companies used by the community are shown as delinquent on the credit report will require proof that payment or a payment agreement that is satisfactory to the utility provider has been made and that the applicant is able to have services delivered in their name.
- 6) Applicants participating in programs or receiving assistance that will provide the landlord with the ability to recover any economic losses will be considered to have passed the credit screening.

#### Landlord References

The Property will run an Amrent report that will contain reported landlord information.

Reviewing the following information:

- 1) A record of eviction from housing or termination from residential programs within the past 5 years will be grounds for rejection. One year of positive rental history, at a minimum, since the eviction will be considered.
- 2) In the case of eviction for non-payment of rent or a late rent payment history, the rent burden on the applicant at the property will be considered.

- 3) If the applicant is participating in a program that provides assistance and/or will cover any economic losses to the landlord, the applicant's unpaid rent or money owed to a landlord will not be considered.

#### Criminal Background Checks:

The property will run an Amrent report that will pull criminal history from a national database regardless of address history given by the applicant. The report will provide only information on convictions for indictable offenses or exit from incarceration in the past 5 years which evidences a future risk of violent crimes, sexually oriented offenses, gang violence, burglary, robbery, abuse/assault battery, murder/homicide, manslaughter, arson or other indictable offenses. The sale, manufacture or trafficking of drugs will be reported for 5 years and will result in denial of the application. Sexual predators on the state sex offender registry will be denied.

In the event that an applicant has a conviction which would exclude them from renting, or in the event that there is evidence of criminal conduct other than a conviction which would exclude an applicant from renting, an applicant nevertheless has the right to request an individualized assessment of their criminal history. The Property will consider evidence provided by the applicant, including but not limited to the following:

- 1) The circumstances surrounding the crime.
- 2) Was the nature of the criminal offense violent against a person or property or adversely affected the health, safety, and welfare of other people.
- 3) The amount of time has passed since the criminal offense.
- 4) The age of the individual at the time that the crime was committed.
- 5) The time which has elapsed since the crime or crimes which were the reason for the initial denial.
- 6) The amount of time that has lapsed since exit from incarceration.
- 7) The number of total convictions which are part of the applicants criminal history as reported.
- 8) The amount and nature of crimes committed, if any, since the criminal record in question.
- 9) Evidence of good tenant history or references since the commission of the crime.
- 10) Evidence of rehabilitation efforts and/or agency support to maintain stability.

Applicants who request an individualized assessment should be provided an opportunity to provide information to allow ownership to consider any circumstances which would serve to mitigate the criminal convictions within the applicant's criminal history. Applicants will be provided with 72 hours to obtain a verified explanation of their circumstances.

In the event the applicant does not meet the Property's criminal screening criteria after this process, the manager will make a memorandum to the file indicating the factors which were considered to make the denial and notify the applicant in writing that the application is denied.

#### Obtaining Applicant Releases:

When applicants are interviewed prior to the eligibility and preference determination, all adult applicants will be required to execute an Authorization for Release of Information Form.



#### Explaining the Screening Process:

Applicants will be told what the Property's applicant selection policy is and what aspects of their background will be checked. This Selection Plan will be made available to all applicants. Some applicants might voluntarily withdraw their applications when they understand the screening process. This is their prerogative.

### **IX. REASONABLE ACCOMODATIONS**

It is illegal to reject an applicant because he or she has a handicap or disability, or for reasons that could be overcome by the Property making a reasonable accommodation of the applicant's disability or handicap. If, even with reasonable accommodation, applicants with disabilities or handicaps cannot meet essential program requirements, it is permissible to reject them. Such insurmountable problems might arise because of behavior or performance in past housing, inability to comply with the terms of the Property's lease, or needed services from the Property staff that represents an alteration in the fundamental nature of the Property's program.

There are three possible stages of processing the application of a person with disabilities under Part 813 and 504 Regulations.

#### **1) Stage 1: Eligibility Review**

- a. The first stage of processing is the determination of program eligibility. At this point it is necessary to document that the applicant or one member of the applicant's family applying for housing in a community designated as a Seniors Community is over the age of 55. All applicants must be income qualified.
- b. Student status is recognized to meet the eligibility criteria related to full-time students. If all occupants are found to be full-time students, they may still be eligible to live in a set-aside rental housing if any of the students are:
  - \* Receiving assistance under Title IV of the Social Security Act
  - \* Enrolled in a job training program receiving assistance under the Job Training Partnership Act or under other similar federal, state or local laws.
  - \* Married couple entitled to file a joint federal tax return.
  - \* Single parent with minor children, none of whom is a dependent of a third party.

#### **2) Stage 2: Applying the Applicant Selection Criteria**

- a. The second stage of processing is applying the applicant selection criteria contained in this Tenant Selection Plan. Neither mitigating circumstances nor reasonable accommodations will be issued for any applicant who does not pass the applicant selection criteria. Thus an applicant who happens to have a disability or handicap but was able to demonstrate a history of meeting financial obligations, caring for a rental housing, avoiding disturbing neighbors and destroying property, refrain from criminal behavior, and, if necessary, ability to comply with the Property's lease, would be recommended for admission with no further reference to or consideration of any disability or handicap.

#### **3) Stage 3: Seeking Mitigating Circumstances or Reasonable Accommodation**

- a. The third step in processing would only come into play if an applicant could not meet one or more of the applicant selection criteria. At this point, applicants with

disabilities or handicaps are entitled to consideration to accommodate their special needs in addition to those afforded to all other applicants.

- b. Staff should hold a second interview with any applicant known to have a disability or handicap who cannot meet one or more of the applicant screening criteria. The purpose of this interview is to determine whether it is possible to admit applicant through consideration of mitigating circumstances or by applying a reasonable accommodation.
- c. Mitigating circumstances would be facts (that can be verified) that would overcome or outweigh information already gathered in the resident screening process. For example, if an applicant's previous history or disturbing neighbors was very poor; but recent behavior was much improved, the Property could consider this a mitigating circumstance. Property staff must document the improvement if the file contained only data about the former consideration or mitigating circumstances before having their application finally rejected. They shall be advised of the right to such consideration in the Rejection Notice, and given an opportunity to verify any mitigating circumstances pertaining to their rental histories.
- d. If the evidence of mitigating circumstance presented by the applicant relates to a change in medical condition or course of treatment, the Property shall have the right to refer such information to persons to evaluate the evidence and verify the mitigating circumstance. Where applicants claim that prior, unsuitable behavior that they are not currently engaged in, alcohol abuse or use of illegal drugs, acceptable verification of mitigating circumstances would have to establish that: There is no verified current abuse of alcohol or illegal drugs. For illegal drugs, any use shall constitute abuse. Current abuse shall be defined as verified use more recent than 120 days prior to the date of application.
  - \* During the period for which the applicant has claimed no current use, the applicant's behavior in the previously unsuitable area must have shown improvement. Unimproved behavior shall be taken to construe that either the applicant's unsuitable behavior was not caused by alcohol or drug abuse, or the applicant is still engaged in alcohol or drug abuse. In any case, a lack of improvement in a previous unsuitable area will result in a rejected application for applicants in this category. The Property shall also have the right to request further information reasonably needed to verify the mitigating circumstance. If the applicant refused to provide or give access to such further information, the Property will give no further consideration to the mitigating circumstance.
- e. Screening personnel must keep in mind that an applicant with a handicap or disability who may, for example, be unable to care for a current apartment alone, may still qualify as able to comply with the lease if he or she can demonstrate that assistance with caring for the rental housing has been secured. Such assistance could be in the form of a Live-In Aide, or it could be a friend, family member, chore service or employee of the applicant. It is not the province of the Property to make judgments about the best way to provide assistance, but simply to determine whether the assistance will enable the applicant to meet the screening criteria.

- f. If applicant has a disability and needs a reasonable accommodation in order to participate in the application process or to make effective use of the housing program, they have the right to request such an accommodation. The applicant should define reasonable accommodation and explain the process by which the housing provider will consider requests for reasonable accommodations. If some form of assistance is needed to enable an applicant to comply fully with the lease terms, screening staff should obtain verification that such assistance is available to the applicant. No reasonable accommodation shall be offered prior to receipt of positive verification of assistance.
- g. If no mitigating circumstances exist that satisfy the Property's applicant selection criteria, the Property must consider reasonable accommodation that the Property could make to eliminate barriers to housing the applicant. Reasonable accommodations may take the form of adjustment of policies, practices, and services, where such adjustments offer an acceptable prospect of successful tenancy. For reasonable accommodations necessary and justified by verified circumstances, management may perform structural modifications to housing or non-housing facilities. Such structural modifications may occur in support of mitigating circumstances, reasonable accommodation, or entirely on their own merit. Structural modifications shall be performed only after having determined that the applicant is a qualified individual with handicaps (passes screening and is eligible). An example of a reasonable accommodation might be approving an applicant for a larger rental housing (waiving the rental housing occupancy standards) to permit occupancy by a tenant who otherwise could not live at the Property.
- h. Accommodations, to be considered reasonable, must not cause undue financial and administrative burden or an alteration in the fundamental nature of the Property's affordable housing program. If a service is necessary for compliance with the lease, the Property can not be required to provide it to an applicant with a disability or handicap if it is not provided to other residents, but the Property must consider admitting that applicant if he or she can document that the service will be provided by others at no cost to the Property.
- i. Any applicant with a disability or handicap who cannot meet the applicant screening criteria, taking into account possible mitigating circumstances, reasonable accommodation by the Property, or service needed for lease compliance verified to be provided to the applicant by others, must be rejected.

#### Assist Animals

An assist animal will not be considered a "pet". If an applicant or resident requests permission for an assist animal to be housed within their rental housing, the management will not use this as justification for rejection of the application or eviction of a tenant. Allowing such an animal will be considered a reasonable accommodation. However, the applicant or resident must provide third party verification of need to document the tenant file. It will be the responsibility of the resident to abide by all rules as set forth in the Pet Policy Agreement. No additional security deposit will be required, however, the resident will be held responsible for any damages caused by said animal.

## **X. REJECTION OF INELIGIBLE OR UNQUALIFIED APPLICANTS**

Applicants who do not pass the eligibility or screening criteria will be sent the Rejection Letter. Such applicants will be notified of their right to schedule an informal meeting within 10 days of the receipt of the letter to discuss the rejection and present additional information. The applicant may also choose to respond in writing. Should an informal meeting be scheduled, it will be conducted by a representative of the owner who is not the property manager who processed the application. The rejection letter will denote the following:

- 1) The household income exceeds current program income limits.
- 2) The household's verifiable income is not two and one half times the monthly income and no rental assistance is available.
- 3) The household size does not meet the occupancy guidelines.
- 4) The credit report indicates a failure to meet past financial obligations. The contact information of the reporting agency is supplied.
- 5) History of failure to pay rent.
- 6) Adverse information reported by previous or current landlord.
- 7) Member or members of the household did not meet criminal screening criteria. An individualized assessment was declined or did not produce additional information upon which the rejection could be reversed.

## **XI. ACCEPTANCE AND MOVE-IN OF ELIGIBLE AND QUALIFIED APPLICANTS**

### **Determining of Rent and Security Deposit:**

Monthly rent amounts will be determined in accordance with the IRS Section 42 Regulations governing the Low-Income Housing Tax Credit housing program and state law.

### **Offering Rental Housing**

When rental housing becomes available for occupancy, it will be offered to the household at the top of the Waiting List for that rental housing type. If the household cannot be contacted within four working days, the offer will be canceled and the rental housing will be offered to the next household on the Waiting List. In that event, the first household will be sent a letter requesting confirmation of its interest in remaining on the Waiting List. If the household replies affirmatively, its application will be retained in its position on the Waiting List; if the reply is negative or if no reply is received within four working days, the applicant will be withdrawn.

### **Move-In Process**

- 1) All adult members of the household will sign the lease and related documents;
- 2) The applicant and management will inspect the rental housing, and will sign the move-in inspection form,
- 3) The applicant will provide verification that all applicable utilities have or will be transferred into the applicant's name, (if applicable)
- 4) The applicant will pay the security deposit (and pet deposit, if applicable):
- 5) The applicant will pay the rent for the first month or partial month of occupancy, as set forth in the lease;
- 6) The applicant will be given a copy of the lease, the move-in inspection form, house rules, and other lease addenda after a complete review of the documents with the manager.

- 7) Keys to the rental housing will be issued to the household.
- 8) A complete orientation of the property amenities and the unit will be given to the applicant to include instruction on operating the appliances and systems in the unit.

Failure to Move-In On Time

Because unit vacancies cause a considerable financial burden on the property, any household that fails to move in on the agreed date will be declined, and the rental housing will be offered to the next household on the Waiting List.





**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

**Tab 10**  
**Executed Certification Statements**



## WODA COOPER COMPANIES

614.396.3200  
www.wodagroup.com  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

February 9, 2022

Harrisonburg Redevelopment and Housing Authority  
286 Kelley Street  
Harrisonburg, VA 22802  
ATTN: Michael G. Wong, Executive Director

RE: Certification Statements  
Request for Proposals, Project Based Vouchers

Dear Mr. Wong,

I, Chelsea Arlantico, certify that the following statements are true:

1. The Simms Pointe housing units are eligible for project-based vouchers (PBV) under Harrisonburg Redevelopment & Housing Authority's (HRHA) Request for Proposals.
2. Construction activities have not been started and will not be started prior to the award of PBV and the signing of the Agreement to enter into a Housing Assistance Payments contract.
3. Simms Pointe Limited Partnership and its contractors will comply with all applicable state and federal labor laws and regulations, federal equal employment opportunity requirements, and HUD's implementing regulations.
4. Simms Pointe Limited Partnership, the Owner, and other Project Principles are not on the U.S. General Services Administration list of parties excluded from Federal procurement and non-procurement programs.
5. Simms Pointe has not received any other award of competitive housing assistance nor has had any prior consideration of PBV.
6. Simms Pointe Limited Partnership will comply with all permitting and zoning.
7. Simms Pointe Limited Partnership has filed for incorporation in Virginia as of the date of this RFP submission to HRHA.
8. Simms Pointe Limited Partnership will comply with all the laws and regulations of the Commonwealth of Virginia.
9. Simms Pointe Limited Partnership is not involved in any current litigation nor contractual dispute.

*Simms Pointe Limited Partnership*

*Chelsea Arlantico, Authorized Representative*



**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)

500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 11**

### **Supportive Services**

### **Supportive Services**

Through the development of Simms Pointe, Simms Pointe Limited Partnership will offer off-site support services for future tenants through the National Counseling Group (“NCG”). NCG is a health and human services agency that provides community services including but not limited to child and family services, life skills, adult support, and mobile crisis. These services prove to be convenient for future tenants because although the services are off-site, NCG’s Harrisonburg office is located only 0.5 miles from the property.

A focus for NCG is providing mental health services to empower individuals and families. NCG offers outpatient counseling for those in need of family, emotional, or mental health issues. NCG will also assist the target population by offering life skills for children living at Simms Pointe. Such life skills that NCG focuses on include work and study habits, job searches, budgeting, and paying bills. All of these skills contribute to preparing individuals for the most successful outcome as a participating member at Simms Pointe and in the City of Harrisonburg.

Simms Pointe Limited Partnership will partner with NCG, as well as Simms Pointe Limited Partnership’s non-profit partner, Bay Aging, to provide supportive services upon Simms Pointe being placed in service.



**WODA COOPER COMPANIES**

614.396.3200  
[www.wodagroup.com](http://www.wodagroup.com)  
500 South Front St  
10th Floor  
Columbus, Ohio 43215

## **Tab 12 Site Plan**





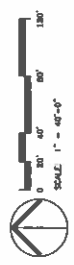
# **SIMMS POINTE HARRISONBURG, VA**

## **SITE DEVELOPMENT DATA**

BUILDING TYPE	1-13R	1-18R	2-18R	2-28R	3-18R	3-28R	TOTAL
GROUND FLOOR	2	0	0	0	0	0	2
SECOND FLOOR	2	0	0	0	0	0	2
THIRD FLOOR	2	0	0	0	0	0	2
TOTAL	6	0	0	0	0	0	6
BUILDING TYPE	1-13R	1-18R	2-18R	2-28R	3-18R	3-28R	TOTAL
GROUND FLOOR	2	0	0	0	0	0	2
SECOND FLOOR	2	0	0	0	0	0	2
THIRD FLOOR	2	0	0	0	0	0	2
TOTAL	6	0	0	0	0	0	6
TOTAL UNITS 80	18	1	22	2	11	1	55
LAND AREA	10,178 SF						10,178 SF
IMPERVIOUS	1,000 SF						1,000 SF
PERMEABLE	9,178 SF						9,178 SF
CONSTRUCTION TYPE	ALUMINUM CLAD WOOD FRAME IN BRICK VENEER						
BUILDING HEIGHT	3 STORY MAX 3'-10" TO TOP OF ROOF						
OCCUPANCY	FAMILY 1-3 C OCCUPANCY #2						

## **DEVELOPMENT AMENITIES**

1. SIGN
2. STORMWATER DETENTION AREA
3. PLAYGROUND
4. PATIO
5. OFF-LEASH DOG PARK
6. COVERED PICNIC AREA
7. PLAYGROUND
8. BASKETBALL COURT
9. DOG PARK
10. UNDISTURBED WOODED AREA
11. 1-13R 24-28R 4-6-28R
12. 1-18R 25-28R 4-6-28R
13. EXTENDED FRONT OF WAY FOR SIDEWALK AND BUS PULL-OFF



**D.E. WEATHERBY & ASSOC.**  
ARCHITECT OF RECORD  
4718 KNOTTY KNOLLS DR.  
CANAANVA, OHIO 43020



**MULTI-FAMILY  
HOUSING**

**SITE PLAN**

**DATE**  
03-10-2022

**PROJECT NAME**  
SIMMS POINTE  
HARRISONBURG, VA

**SUBMISSION**  
VIRGINIA  
TAX CREDIT  
SUBMISSION 2022

**SHEET**  
S1.1

**RESOLUTION AFFIRMING INTEREST RATE PURSUANT TO  
2010 REVENUE BOND AND 2017 ALLONGE**

**WHEREAS**, the Harrisonburg Redevelopment Housing Authority (“HRHA”) previously issued Revenue Bond R-1 (Renovation and Refinancing Project) Series 2010 (“Bank-Qualified”) dated December 31, 2010, in the face amount of \$1,730,000 (the “Revenue Bond”); and

**WHEREAS**, the Revenue Bond provides that the interest rate on the outstanding principal balance resets on December 21, 2016; December 21, 2021; and December 21, 2026; based upon the calculation set forth therein; and

**WHEREAS**, the Revenue Bond was subsequently amended by an Allonge dated June 21, 2017, to provide that the interest rate calculated on each interest rate reset date shall not be less than 3.1 percent; and

**WHEREAS**, the new interest rate for the five-year period beginning December 21, 2021, is 3.2 percent based upon the calculation set forth in the Revenue Bond; and

**WHEREAS**, United Bank, the bondholder for the Revenue Bond, has requested that HRHA affirm the new interest rate.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF COMMISSIONERS OF THE HARRISONBURG REDEVELOPMENT AND HOUSING AUTHORITY THAT:**

1. The interest rate of 3.2 percent calculated pursuant to the Revenue Bond for the five-year period which commenced on December 26, 2021, is hereby affirmed and approved.
2. The Executive Director is authorized to execute any documents necessary to effectuate the new interest rate to the extent consistent with the Revenue Bond, Allonge, and this Resolution.

Resolved this 16<sup>th</sup> day of February 2022.

### **CERTIFICATE OF VOTES**

Record of the roll-call vote by the Commissioners of the Harrisonburg Redevelopment and Housing Authority, upon reading of a resolution titled **“RESOLUTION AFFIRMING INTEREST RATE PURSUANT TO 2010 REVENUE BOND AND 2017 ALLONGE”** taken at a meeting of the Authority held on February 16, 2022:

	<b>AYE</b>	<b>NAY</b>	<b>ABSTAIN</b>	<b>ABSENT</b>
Dany Fleming, Chair				
Christine Fasching Maphis				
Luciano Benjamin				
Kevin Coffman				
Gil Colman				
Jody Johannessen				
Shonda Green				

Dated: February 16, 2022

\_\_\_\_\_  
(SEAL)  
Chair, Harrisonburg Redevelopment and  
Housing Authority

**ATTEST:** \_\_\_\_\_  
Secretary

The undersigned Secretary of the Harrisonburg Redevelopment and Housing Authority hereby certifies that the foregoing is a true, correct, and complete copy of a Resolution adopted by the commissioners present and voting at a meeting duly called and held on February 16, 2022, in accordance with law, and that such Resolution has not been repealed, revoked, rescinded, or amended, but is in full force and effect as of the date hereof.

WITNESS my hand and the seal of Harrisonburg Redevelopment and Housing Authority this 16th day of February, 2022.

**HARRISONBURG REDEVELOPMENT AND  
HOUSING AUTHORITY**

By: \_\_\_\_\_  
Michael G. Wong, Secretary

**VOUCHER PROGRAM MANAGEMENT SUMMARY**  
**JANUARY 2022 FOR 2/16/22 BOARD MEETING**

**1. Waiting List, Housing Choice Voucher (month-end)**

	1BR	2BR	3BR	4BR	5BR	6BR	Total
Applications by Unit Size	277	426	280	114	29	2	1,128
New Applicants This Month*	0	0	0	0	0	0	0

\* The waiting list was closed effective 12/1/2021 and is anticipated to reopen 3/1/2022.

**2. Voucher Utilization (month-end)**

All Available Vouchers	956	100%
Leased (under HAP):	803	84%
Issued (searching):	56	6%
Not Assigned:	97	10%

**3. HAP Expenditures (first of month)**

Total HAP (excludes FSS, incentives)	\$467,175
Leased Vouchers	794
Average Per Unit Cost	\$588.30

**4. Issued Vouchers ("on the street") – Household Search Time by Voucher Size**

	1BR	2BR	3BR	4BR	5BR	Total
# of Searching Households	29	15	7	5	-	56
Average Search Time (days)	143	96	135	100	-	126

**5. Vouchers Issued This Month**

New Vouchers Issued & Briefed	
New Tenant-Based / Briefing Session	6
Project-Based / Briefing Session	1
Port-In / Briefing Session	0

**6. Landlord Information**

Landlords currently in program (excluding HRHA)	214
New landlords to the program	1
Landlord bonuses (\$250 each) paid	8
Landlord damage claim requests (\$750 each) paid	3
Landlords using Assistance Connect Portal as of report date	52

**7. Inspections Completed this Month**

	HRHA				WRHA			Total
Completed This Month	Pass	Fail	Other	Total	Pass	Fail	Total	
Pre-Lease Inspections	9	1	-	10	5	-	5	15
Annual/Biennial Inspections	17	6	3	26	13	4	17	43
Annual/Biennial Re-Inspects	4	-	-	4	5	-	5	9
<b>TOTAL</b>	<b>30</b>	<b>7</b>	<b>3</b>	<b>40</b>	<b>18</b>	<b>4</b>	<b>27</b>	<b>67</b>

**8. PIC Submission: 99.07%**

**9. Certification Details (for the month; excludes billed port-outs)**

	Annual Certs	Interim Certs	New Leases	Ends of Participation	Total	Caseload (housed)
Kim	16	24	-	4	44	249
Jon	8	16	11	1	36	255
Stephany	23	18	-	-	41	265
Sandra	5	2	-	1	8	30
<b>Total</b>	<b>52</b>	<b>59</b>	<b>11</b>	<b>6</b>	<b>129</b>	<b>799</b>

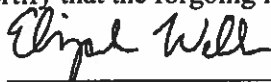
New Leases	Franklin Heights	Commerce Village	Voucher at Lineweaver	Private Landlord	Total
New Admission	1	0	1	6	8
Transfer/Change of Unit	1	0	0	2	3
Incoming Portable	--	--	-	1	1
<b>Total</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>8</b>	<b>12</b>

Interim Certifications		Owner Rent Increases	Total
Income Decrease	16	Franklin Heights	7
Income Increase	25	Commerce Village	1
Household Change	6	Lineweaver Annex	5
Other	1	Private Tax Credit	4
Owner-Led (rent change)	11	Private – Rent Study	18
<b>Total</b>	<b>59</b>	<b>Total</b>	<b>35</b>

End of Participation / Termination	Total
<i>Didn't Complete Annual</i>	2
<i>Gave Up Voucher</i>	2
<i>Other</i>	1
<i>Voucher Expired</i>	1
<b>Total</b>	<b>6</b>

Welcome to Stephany Campbell, our newest HCV Specialist, who began on January 10, 2022!

I certify that the forgoing information is true and correct to the best of my knowledge and belief.



Elizabeth Webb, HCV Manager

February 11, 2022  
Date



JR "Polly" Lineweaver Program Management Report  
Month of January 2022

**Applications**

	Efficiency	One bedroom
Currently On Waiting List	0	100
New Applications Taken	0	0

**Marketing**

	Efficiency	One bedroom	Total
# of units vacant	3	1	4
# of Tenants who moved in	3	1	4
# of Tenants who moved out	3	1	4
# of Tenants who transferred	0	0	0
# of Legal Notices	1	1	2
# of Unlawful Detainers	1	1	2

**Occupancy**

15	# of minorities	0.26%
51	# of disabled tenants	89%
29	# of elderly tenants	50%
Total Number of Units Leased: <u>57</u>		

**Tenant Accounts Receivable**

Accounts Receivable at end of Month	\$36,372.76		
Delinquent Accounts By Age	30 7	60 7	>60 7
Security Deposits Held	\$13,986.73		
Pet Deposits Held	\$1,395.00		
Rent Billed	\$16,223.66		
Rent Collected	\$20,540.02		

Number of Inspections	0
-----------------------	---

**Management**

**Comments on any problems experienced during the month:**

--

I certify that the forgoing information is true and correct to the best of my knowledge and belief.

  
Lisa Benasher, Lineweaver Property Manager

Date

2-2-2022

Lineweaver Annex Program Management Report...  
Month of January 2022

**Applications**

Currently On Waiting List	100
New Applications Taken	0

**Marketing**

# of units vacant	6
# of Tenants who moved in	1
# of Tenants who moved out	1
# of Tenants who transferred	0
# of Legal Notices	0
# of Unlawful Detainers	0

**Occupancy**

12	# of minorities	0.22%
43	# of disabled tenants	79%
16	# of elderly tenants	29%
Total Number of Units Leased 54		

**Tenant Accounts Receivable**

Accounts Receivable at end of Month	\$24,503.81		
Delinquent Accounts By Age	30 5	60 5	>60 5
Security Deposits Held	\$27,111.42		
Pet Deposits Held	\$1,750.00		
Rent Billed	\$15,210.00		
Rent Collected	\$16,018.51		

Number of Inspections	0
-----------------------	---

**Management**

Comments on any problems experienced during the month:

--

I certify that the forgoing information is true and correct to the best of my knowledge and belief.

 2-2-2022  
Lisa Benasher, Lineweaver Manager Date

**FRANKLIN HEIGHTS PROGRAM MANAGEMENT REPORT  
FOR THE MONTH OF JANUARY 2022**

**1.) Marketing:**

	<u>1 BDR</u>	<u>2 BDR</u>	<u>3 BDR</u>	<u>4 BDR</u>	<u>5 BDR</u>	<u>Total</u>
# of Units Vacant	<u>2</u>	<u>1</u>	<u>2</u>	<u>1</u>	<u>0</u>	<u>6</u>
# of Tenants who moved in	<u>0</u>	<u>0</u>	<u>1</u>	<u>0</u>	<u>0</u>	<u>1</u>
# of Tenants who moved out	<u>0</u>	<u>1</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>1</u>
# of Tenants evicted	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
# of Tenants who transferred	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
# of Legal Notices	<u>4</u>	<u>13</u>	<u>24</u>	<u>4</u>	<u>1</u>	<u>46</u>
# of Unlawful Detainers	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Tenants who are over-housed	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Tenants who are under-housed	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
Units with handicap access	<u>9</u>	<u>0</u>	<u>2</u>	<u>4</u>	<u>1</u>	<u>16</u>
Tenants who need handicap access	<u>5</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>5</u>
Tenants who have handicap access	<u>5</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>5</u>

**2.) Occupancy:**

TOTAL NUMBER OF UNITS LEASED: 123

**3.) Tenant Accounts Receivable:**

Security and Pet Deposits Held:	<u>\$114,122.00</u>
Rent Billed	<u>\$137,545.22</u>
Rent Collected	<u>\$129,852.08</u>

**4.) Applications:**

	<u>1 BR</u>	<u>2 BR</u>	<u>3 BR</u>	<u>4 BR</u>	<u>5BR</u>
Currently on the Waiting List there are a total of <u>771</u> applicants.	<u>239</u>	<u>289</u>	<u>156</u>	<u>066</u>	<u>021</u>

**5.) Inspections:**

Number Completed	Excellent	Acceptable	Needs work	Issues
0	0	0	0	0

6.) **Management:**

**Comments on any problems experienced during the month:**

- Franklin Heights, LLC (FH) had one move-in and one move-out for the month of January 2022.
- For the month of January 2022 FH collected \$75.00 in recoupment from tenant(s) who had bad debt.
- FH has started adjudicating rental issues in court (FH will work with any client with regards to payment agreements and/or willing to apply for rental assistance). FH has applied for 21 tenants with the Rental Relief Program (RRP) and provided all requested verification by RRP (tenants will have to complete their end of the application before assistance is given or denied by RRP).
- January 2022 has been the highest month with legal notices.
- FH stopped taking applications for the program effective 12/01/21, and FH's waiting list was purged on 11/21.

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE  
BEST OF MY KNOWLEDGE AND BELIEF

  
\_\_\_\_\_  
Nehemias Velez, FH Property Manager

2/8/22  
\_\_\_\_\_  
Date

COMMERCE VILLAGE PROGRAM MANAGEMENT REPORT  
FOR THE MONTH OF JANUARY 2022

	VASH	HCV
VACANT	0	0
MOVE IN	0	0
MOVE OUT	0	0
EVICTIONS	0	0
TRANSFERRED	0	0
LEGAN NOTICES	0	0
DETAINERS	0	0

30 UNITS LEASED                      30

OUTSTANDING BALANCE	156.00
DELINQUENT ACCT	30: 0   60: 1   90+ 0
SECURITY DEPOSIT	15,982.00
RENT BILL	18,225.00
RENT COLLECTED	17,793.00

APPLICATIONS                                      227

COMMENTS ON ANY PROBLEMS – RESIDENT PAST DUE IS MAKING PAYMENTS

I CERTIFY THAT THE FOREGOING INFORMATION IS TRUE AND CORRECT TO THE  
BEST OF MY KNOWLEDGE AND BELIEF

*SANDRA LOWTHER*

*01/28/2022*



## Monthly Report –January 2022

### HCV PARTICIPANTS

Employment	Education/Training	Escrow
In Program: 24	Enrolled in GED: 0	Positive Escrow Balances: 18
Employed: 12	Enrolled in ESL: 0	Earning Monthly Escrow: 9
Unemployed/Furlough: 9	Enrolled in Continuing Ed: 1	Newly Earning Escrow: 0
Medical Leave/ Disability: Maternity Leave: 1	Started this month: 0	Increase in Earning Escrow: 3
		Decrease in Earning Escrow: 1
		Interim Escrow Withdrawals: 0

### FRANKLIN HEIGHTS PARTICIPANTS

Employment	Education/Training	Escrow
In Program: 30	Enrolled in GED: 1	Positive Escrow Balances: 17
Employed: 17	Enrolled in ESL: 1	Earning Monthly Escrow: 11
Unemployed/Furlough: 10	Enrolled in Continuing Ed.:3	Newly Earning Escrow: 1
Medical Leave/ Disability: Maternity Leave: 3	Started this month: 0	Increase in Earning Escrow: 1
		Decrease in Earning Escrow: 0
		Interim Escrow Withdrawals: 1

### HARRISON HEIGHTS

Employment	Education/Training	Escrow
In Program: 10	Enrolled in GED: 0	Positive Escrow Balances: 7
Employed: 9	Enrolled in ESL: 1	Earning Monthly Escrow: 5
Unemployed: 1	Enrolled in Continuing Ed:0	Newly Earning Escrow: 0
Medical Leave/ Disability: Maternity Leave: 0	Started this month: 0	Escrow Increases: 4
New jobs this month: 0		Decrease in Earning Escrow: 1
		Interim Escrow Withdrawals: 0

### Program Highlights

FSS welcomes new staff. 2 piece of furniture was distributed. 2 way2go referrals were made. FSS staff helped participants resume editing.

Date: 2/1/ 2022      FSS Coordinators:    Zoe Parakuo    Sandy Loreda

# Harrisonburg Redevelopment & Housing Authority Report

## Financial Report as January 31, 2022

### LOCAL COMMUNITY DEVELOPMENT

Cash:	First Bank & Trust-Operating Funds		\$70,644.88
		Total	\$70,644.88
	AR Due from:		
	JR Polly Lineweaver Apartments	\$211,022.93	
	Housing Choice Voucher Program	\$43,922.57	
	Commerce Village, LLC	\$10,157.46	
	Franklin Heights, LLC-Operating Expenses	\$47,502.33	
	Franklin Heights, LLC-Debt Servicing	\$80,475.44	
		\$393,080.73	

### HOUSING CHOICE VOUCHER PROGRAM

Cash:	SunTrust-Checking Account		\$282,893.94
	United Bank-FSS Escrow for participants		\$97,590.97
		Total	\$380,484.91

### J.R. POLLY LINEWEAVER APARTMENTS

Cash:	United Bank-Checking Account		\$39,575.18
		Total	\$39,575.18

### ALL PROGRAMS-FH, LW, JRL

Cash:	United Bank-Security Deposit Account		\$189,859.73
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### COMPONENT UNITS

Franklin Heights, LLC			
Cash:	United Bank-Checking Account		\$137,869.19
Commerce Village, LLC			
Cash:	First Bank & Trust		\$213,017.05
	BB&T-Operating Reseve Account		\$130,741.22

**Grand Total** **\$1,162,192.16**