

#### **Cover Letter**

September 5, 2024

RE: Senior Affordable Housing – 221 E McCarty Lane

Greetings,

We are resubmitting the Resolution of No Opposition Application for the following changes (to Resolution 2024-90R): 1) the specific amenities selected, and 2) the number of units at the various rent and income set-asides.

#### Regarding #1

In Section 6,g,i, the Resolution specifically calls out the amenities selected however through the course of our design process the exact amenities needed to change. We have attached an updated amenity list showing that we meet the minimum requirement of 19 amenity points (one more than the points required by TDHCA).

Our request: To include the new amenity list in the revised application (attached).

#### Regarding #2

In Section 6b of the Resolution, the language goes beyond the City's Resolution for including 30% AMI units at affordable developments and applies specifies restrictions to the number of units at the various rent and income levels.

Our request: To change the language to the following,

"The project will provide 15% of the total units for those making 30% or less of area median income and the average rent and income for all units will be no greater than 60% AMI."

This is beneficial for three reasons: 1) this allows a developer's unit count to change between the Resolution Application and the city's approval for building permits, 2) ensures the number of 30% units complies with the city's Resolution regardless of changes to the total unit count, and 3) gives the developer the flexibility to rely on market studies to elect set-asides that can ensure affordable housing for people who's income may exceed 60% AMI.

Sincerely,

#### **Dylan Klopp**

Senior Development Manager JES Dev Co, Inc.

#### **RESOLUTION NO. 2024-90R**

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SAN MARCOS, TEXAS PROVIDING NO OBJECTION TO THE SUBMISSION OF AN APPLICATION FOR LOW INCOME HOUSING TAX CREDITS TO THE TEXAS DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS FOR THE PROPOSED BLANCO BASIN MULTIFAMILY HOUSING PROJECT LOCATED TO THE NORTHEAST OF THE INTERSECTION BETWEEN E MCCARTY LANE AND THE UNION PACIFIC RAILROAD; APPROVING FINDINGS RELATED TO THE APPLICATION; IMPOSING CONDITIONS FOR SUCH NON OBJECTION; AND DECLARING AN EFFECTIVE DATE.

#### **RECITALS:**

- 1. JES Dev Co, Inc. (the "Applicant") has proposed a multifamily development presently known as "Blanco Basin" for affordable rental housing located to the northeast of the intersection between E McCarty Lane and the Union Pacific Railroad which will include 222 units (the "Project").
- 2. The Applicant has communicated that it intends to submit an application to the Texas Department of Housing and Community Affairs ("TDHCA") for Low Income Housing Tax Credits for the Project.
- 3. As provided for in §11.3(c) of the Qualified Allocation Plan, the City of San Marcos has more than twice the state average of units per capita supported by Housing Tax Credits or Private Activity Bonds.
- **4.** In accordance with the requirements of Texas Government Code §2306.67071 and Texas Administrative Code §11.204(4):
  - a. notice has been provided to the City of San Marcos, Texas;
  - b. the City of San Marcos, Texas has had sufficient opportunity to obtain a response from the Applicant regarding any questions or concerns about the Project; and
  - **c.** the City of San Marcos, Texas has held a hearing at which public comment may be made on the Project.
- 5. The Applicant has demonstrated that the Project meets the necessary criteria in order to be considered for an exemption from local taxes as follows:
  - a. The project will provide a minimum of 34 units (15% of all units) affordable to households at or below 30% AMI for the duration of the tax exemption;
  - b. The project will provide a minimum of 4 units (or 1.8% of all units) that are ADA accessible and affordable to households at or below 30% AMI;

- c. The project shall include these criteria in the Texas Department of Housing and Community Affairs Land Use Restriction Agreement;
- d. The project shall partner with the Capital Area Housing Finance Corporation (CAHFC) which addresses housing needs in Central Texas.
- 6. The Applicant has demonstrated that the Project complies with the City of San Marcos Affordable Housing Policy pertaining to consideration of Low Income Housing Tax Credit projects by meeting at least five of the eight necessary criteria as follows:
  - a. The project meets the necessary criteria to be considered for a tax exemption;
  - b. The Project will provide 34 units for those making 30% or less of area median income and 188 units for those making 60% or less of the area median income;
  - c. The project is located within a Medium Intensity (Star Park) Zone on the Preferred Scenario Map.
  - **d.** The project is not proposed to develop under a legacy district on the City's current zoning map.
  - e. The project is within a half mile of a grocery storey, medical facilities, and a school.
  - f. The Project is not located within one quarter mile walking distance of an existing bus stop on a current transit route, however the site is adjacent to a current City transit route and there are plans to put in a bus stop within 1/4 mile of the development in the future, albeit the exact location has not been confirmed at this time.
  - g. The Project will incorporate wraparound services that provide flexible voluntary social, economic, or education benefits to the residents. Incorporated services will utilize local support services and resources, meet the needs of the local community, and exceed the minimum Texas Department of Housing & Community Affairs requirements for amenities. The Project will incorporate the listed common amenities and resident support services:
    - i. Secured Entry (applicable only if all Unit entries are within the building's interior); twenty-four hour, seven days a week recorded camera / security system in each building; furnished fitness center equipped with a variety of fitness equipment (at least one item for every 40 Units) chosen from a specific list identified in the Qualified Action Plan; enclosed community sun porch or covered community porch/patio; dog Park area that is fully enclosed (the perimeter fencing may be used for part of the enclosure) and intended for tenant owned dogs to run off leash (requires

that the Development allow dogs); porte-cochere; barbecue grill and picnic table with at least one of each for every 50 Units (grill must be permanently installed -no portable grills); business center with workstations and seating internet access, 1 printer and at least one scanner which may be integrated with the printer, and either 2 desktop computers or laptops available to check-out upon request; furnished Community room; Library with an accessible sitting area (separate from the community room); Activity Room stocked with supplies (Arts and Crafts, board games, etc.); Community Dining Room with full or warming kitchen furnished with adequate tables and seating; High-speed Wi-Fi with advanced telecommunications capacity as determined under 47 U.S.C. 1302 or more with coverage throughout the clubhouse or community building; Annual income tax preparation (offered by an income tax prep service) or IRS-certified VITA (Volunteer Income Tax Assistance) program (offered by a qualified individual) that also emphasizes how to claim the Earned Income Tax Credit; Reporting rent payments to credit bureaus for any resident who affirmatively elects to participate, which will be a requirement of the LURA for the duration of the Affordability Period; Annual health fair provided by a health care professional; Partnership with local law enforcement or local first responders to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.); Partnership with local law enforcement or local first responders to provide quarterly on-site social and interactive activities intended to foster relationships with residents (such activities could include playing sports, having a cook-out, swimming, card games, etc.); Notary Services during regular business hours (§2306.6710(b)(3)), and Twice monthly on-site social events (i.e. potluck dinners, game night, sing-a-longs, movie nights, birthday parties, holiday celebrations, etc.).

## BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SAN MARCOS, TEXAS:

- **PART 1.** The San Marcos City Council finds the Recitals to be true and correct and adopts them as the findings of the City Council and incorporates them as part of this resolution.
- **PART 2.** After due consideration of the findings of the City Council as stated in the Recitals, the information provided by the Applicant and any public comment, the City of San Marcos, Texas has no objection to the proposed application for the Project to the TDHCA, and confirms that the City Council has voted specifically to support the submittal of applications for the Project and to authorize an allocation of Housing Tax Credits for the Project pursuant to Texas Government Code §2306.6703(a)(4).

#### **PART 3.** As conditions of approval of this resolution:

- a. The Applicant must comply with all City of San Marcos rules and regulations governing the development of the Project including, but not limited to:
  - i. the adopted Transportation Master Plan;

- ii. all standards and regulations within the City's Code of Ordinances; and
- requirements for submission of required applications and payment of iii. applicable fees.
- The Applicant may not apply for and the Project will not be eligible to receive any variances from any applicable City of San Marcos ordinances, rules or regulations.
- The Applicant must submit an executed Memorandum of Understanding for each local residential support service provider prior to the approval of future permits.
- To the extent applicable, the City Council hereby approves the application of PART 4. the Texas Housing Finance Corporations Act, Chapter 394, Local Government Code (the "Act"), to the property on which the development will be constructed and grants its approval for the use of proceeds of bonds issued by a housing finance corporation pursuant to the Act to finance construction of the development.
- As provided for in 10 TAC §11.3(e) and §11.4(c)(1), it is hereby acknowledged PART 5. that the proposed New Construction Development is located in a census tract that has more than 20% Housing Tax Credit Units per total household and the proposed Development is consistent with the City's obligation to affirmatively further fair housing and the City has no objection to the Application.
- PART 6. For and on behalf of the City Council, the Mayor or the City Clerk are each authorized to certify one or more copies of this resolution for submission to TDHCA.
- This resolution shall be in full force and effect immediately from and after its PART 7. passage.

ADOPTED on May 21, 2024

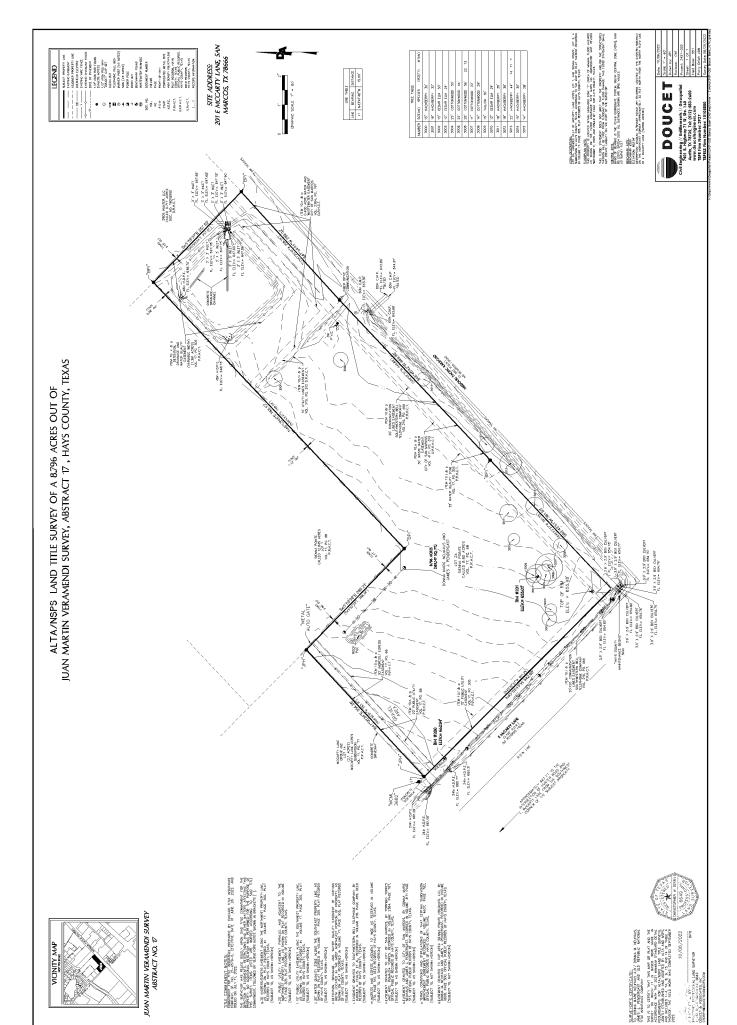
Jane Hughson
Mayor

Mayor

Attest:

Elizabeth Trevino

City Clerk



### LOW INCOME HOUSING TAX CREDIT (LIHTC) RESOLUTION APPLICATION

Dylan Klopp



**Applicant's Name** 

Describe the unit mix:

Efficiency

0

How Many Accessible Units are Included: 12





**Brian Kimes** 

Company		JES Dev	Co, Inc.	Company	San Marcos Land Holding-CCP, L.L.C.							
Applicant's Ma	ailing	206 Peach W 65203	Vay, Columbia, MO	Owner's Mailing Address	206 Peach Way, Columbia, MO 65203							
Applicant's Ph	one#	214-960-	2750	Owner's Phone #	573-443-2021							
Applicant's En	nail	DKlopp@J	JESDevCo.com	Owner's Email	BKimes@JESSmith.com							
<b>PROPERTY</b>	PROPERTY INFORMATION											
Subject Proper	ty Addre	ess: 221 E M	/IcCarty Road	· · · · · · · · · · · · · · · · · · ·								
Tax ID #: R <u>14</u> 3	3893		Existing	Zoning: CD-5								
Legal Descript	ion: Lo	t 2A	_ Block	Subdivision Sien	na Point							
Existing Use:	Vacan	t Land	Propose	ed Use: Multifamily Aր	partment Housing							
_												
DESCRIPTION			r									
Project Name:	Blanco	Basin										
•			n for choosing locatio		perty amenities or services,							
Please se	e attac	ched.										
Type of Housing Tax Credit Resolution:  Are you requesting to be exempt from local taxes?												
Type of Housir	ng Tax C	redit Resoluti	ion:	Are you requestin	g to be exempt from local taxes?							
			ion: Housing Tax Credi		g to be exempt from local taxes?  or  No							
	Tax Cre	dit or 9%										
4% Housing	Tax Cre	dit or 9%										
4% Housing  DESCRIPTION  UNIT TYPE  Number of Units	Tax Cre	dit or 9% UNITS MARKET 0	Housing Tax Credi	AFFORDABLE UNITS	or No							
4% Housing  DESCRIPTION  UNIT TYPE	Tax Cre	dit or 9% UNITS MARKET 0	Housing Tax Credi	t res	or No							
4% Housing  DESCRIPTION  UNIT TYPE  Number of Units  Percentage of To	Tax Cre ON OF  otal Units	dit or 9% UNITS MARKET 0 0 0 0 0	Housing Tax Credit	AFFORDABLE UNITS	TOTAL 222 100%							
4% Housing  DESCRIPTIC  UNIT TYPE  Number of Units  Percentage of To	Tax Cre ON OF  otal Units are ava	UNITS  MARKET  0  0  0  ilable to each	Housing Tax Credit	AFFORDABLE UNITS 222 100% ted below (i.e. rent lev	TOTAL  222  100%  rel of tenants)?							
4% Housing  DESCRIPTIC  UNIT TYPE  Number of Units  Percentage of To	Tax Cre ON OF  otal Units	dit or 9% UNITS MARKET 0 0 0 0 0	Housing Tax Credit	AFFORDABLE UNITS 222 100% ted below (i.e. rent lev	TOTAL 222 100%							

**Property Owner** 

2 Bedroom

100

3 Bedroom

4 Bedroom

1 Bedroom

**Total Units** 

222

#### **Criteria**

Applications must fully meet at least five (5) of the eight (8) criteria below, including criteria #1, in order to receive a staff recommendation which is presented to the Workforce Housing Council Committee. Applications must also receive a recommendation from the Workforce Housing Council Committee prior to consideration by City Council.

Please Indicate which of the criteria your project is consistent with and explain. Use additional pages if necessary.

	Criteria	Explanation
<b>✓</b>	1. No exemption from local taxes is requested unless the project meets the criteria A-E outlined below.  ✓ A — A minimum of 15% of all units within the project shall be affordable to households at or below 30% percent of the AMI for the duration of the tax exemption.  ✓ B — A minimum of 10% of the units affordable to households at or below 30% of the AMI shall be ADA accessible.  C — A minimum of 35% of the units within a project that is not age-restricted shall include a minimum of three bedrooms in each unit.  ✓ D — The project shall include these criteria in the Texas Department of Housing and Community Affairs Land Use Restriction Agreement (LURA).  ✓ E — When considering a recommendation of support, preference should be given to projects that utilize a local entity for such tax exemptions.	Please see Appendix A.
<b>√</b>	2. The proposed units address a housing need identified in the City's Housing Policy or the City's current consolidated plan for HUD programs, which can be found on the <u>City's Website</u> .	Please see Appendix A.
<b>✓</b>	3. The project is located within a high or medium intensity zone on the City's <u>Preferred Scenario Map</u> .	Please see Appendix A.
<b>√</b>	4. The project is not proposed to develop under a legacy district on the City's current zoning map.	Please see Appendix A.
<b>✓</b>	5. The project is located within half (.5) mile walking distance from services such as grocery, medical facilities, and schools.	Please see Appendix A.
	6. The project is located within one quarter (.25) mile walking distance of a proposed or existing bus stop on a current or planned transit route. If the project is not located within one quarter (.25) mile walking distance of a proposed or existing bus stop on a current or planned transit route, a private shuttle service for residents is provided in accordance with TDHCA requirements.	Please see Appendix A.
	7. The project is renovating or redeveloping an existing multifamily complex or underperforming development.	Not applicable.
<b>✓</b>	8. The project incorporates wraparound support services that provide flexible voluntary social, economic, or education benefits to the residents. Project should meet criteria A-D outlined below.  ✓ A − Meet the needs of the local community;  ✓ B − Utilize local support services and resources;  ✓ C − Exceed the minimum TDHCA requirements for amenities; and  ✓ D − Submit to the City the Project's TDHCA Application for Low Income Housing Tax Credits and includes the list of amenities in the Project's Land Use Restriction Agreement (LURA).	Please see Appendix A.

#### Additional Considerations

In addition to the criteria outlined above, the following may be considered by staff and the Workforce Housing Council Committee as means for recommending approval or denial of a request:

	Criteria	Explanation
	1. Regardless of compliance with the above criteria, projects located where emergency response times fall out of the National Fire Protection Association (NFPA) standards and / or projects located within or in close proximity to the floodplain may receive a denial recommendation.	Not applicable.
<b>√</b>	<ul> <li>2. Projects seeking tax exemption should</li> <li>Include an estimate of the tax revenues which will not be realized by the City, annually, over the life of the project.</li> <li>Describe future plans for placing the property back on the tax roll, if applicable.</li> </ul>	Please see Appendix A & C.
<b>✓</b>	3. For senior housing projects, inclusion of the following, additional, support service: presentations by the Capital Area Council of Governments (CAPCOG) Area Agency on Aging. Applicants must contact CAPCOG to arrange for a presentation of available services no less than once every other year and provide proof of this agreement with the application. <a href="https://www.capcog.org/divisions/area-agency-on-aging#areaagencyon-aging">https://www.capcog.org/divisions/area-agency-on-aging#areaagencyon-agin</a>	Please see Appendix A & D.
<b>✓</b>	4. For senior housing projects, the distance to medical facilities will receive additional scrutiny. Applicants must indicate the nearest medical facilities and any additional transportation options which will be available to residents in the event of an emergency.	Please see Appendix A.
	5. Once approved, additional consideration will be given to applications which show compliance with the Strategic Housing Action Plan.	Please see Appendix A.

#### **AUTHORIZATION**

I certify that the information on this application is complete and accurate. I understand the fees and the process for this application. I understand my responsibility, as the applicant, to be present at meetings regarding this request.

Filing Fee \$1,000 plus \$100 per acre Technology Fee \$15 MAXIMUM COST \$5,015

Submittal of this digital Application shall constitute as acknowledgment and authorization to process this request.

#### **EMAIL APPLICATION TO - PLANNINGINFO@SANMARCOSTX.GOV**



# CHECKLIST FOR HOUSING TAX CREDIT RESOLUTION APPLICATION

an	e following items are requested for consideration of this application. These d additional items may be required, at the request of the Department, in der to determine the application complete and filed.	Comments				
<b>√</b>	Pre-development meeting with staff is <u>required</u> unless waived by the Responsible Official  • Please visit <a href="http://sanmarcostx.gov/1123/Pre-Development-Meetings">http://sanmarcostx.gov/1123/Pre-Development-Meetings</a> to schedule, or email <a href="mailto:planninginfo@sanmarcostx.gov">planninginfo@sanmarcostx.gov</a> with any questions.	Completed 09/2023.				
<b>√</b>	Completed Application for Housing Tax Credit Resolution	Complete				
<b>✓</b>	Project Cover Letter	Complete				
<b>✓</b>	Draft Texas Department of Housing and Community Affairs Land Use Restriction Agreement with Listed Amenities.	Not available at this time.				
<b>√</b>	List of proposed amenities in accordance with TDHCA requirements for amenities.	Please see Appendix B.				
<b>√</b>	Subdivision Plat or Metes and Bounds Description	Please see Appendix E.				
<b>√</b>	If metes & bounds is provided the following may be required:  • CAD file in grid for GIS integration. Projection: NAD 1983 StatePlane Texas South Central FIPS 4204 Feet	Submitted through portal.				
<b>✓</b>	Authorization to represent the property owner, if the applicant is not the owner	Not applicable, but included.				
<b>✓</b>	Filing Fee \$1,000 + \$100 per acre (\$5,000 max)  Technology Fee \$15	Sent.				

<sup>\*\*</sup>San Marcos Development Code Section 2.3.1.1(C): "Every application accepted by the responsible official for filing shall be subject to a determination of completeness...the responsible official is not required to review an application unless it is complete..."

#### **RESOLUTION NO. 2023-189R**

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF SAN MARCOS, TEXAS APPROVING AMENDMENTS TO THE LOW-INCOME HOUSING TAX CREDIT ("LIHTC") POLICY SECTION OF THE AFFORDABLE/WORKFORCE HOUSING POLICY TO REDUCE THE REQUIRED PERCENTAGE OF UNITS UNDER 30 PERCENT OF THE AREA MEDIAN INCOME FROM 25 PERCENT TO 15 PERCENT; AND DECLARING AN EFFECTIVE DATE.

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF SAN MARCOS, TEXAS:

- The Affordable/Workforce Housing Policy is hereby amended to reduce the PART 1. required percentage of units under 30 percent of the Area Median Income from 25 percent to 15 percent as reflected in the attachment hereto.
- This resolution shall be in full force and effect immediately from and after PART 2. its passage.

ADOPTED on December 5, 2023.

fane Hughson

Mayor

Attest:

Elizabeth Trevino

City Clerk

#### Affordable / Workforce Housing Policy

**Purpose:** Define issues associated with the expansion and preservation of diverse, affordable housing choices, in San Marcos and identify specific goals and strategies to address those issues in a manner consistent with the vision expressed in the City's Comprehensive Plan.

#### Vision San Marcos Neighborhood & Housing Vision Statement

We envision San Marcos to have a strong, more comprehensive foundation of safe, stable neighborhoods while preserving and protecting the historical, cultural, and natural identities of those neighborhoods.

**Importance:** Affordable housing is important to the economic vitality of San Marcos as an adequate supply supports the local workforce and allows them to live close to their jobs. Shorter commutes reduce traffic congestion, air pollution, and expenditures on road maintenance. Having an adequate housing supply also provides a competitive advantage for area employers. Affordable housing benefits families by alleviating overcrowding, reduces the potential of foreclosure and evictions, and may provide the housing stability that is vital to the emotional well-being of children.

#### **Definitions:**

- Area Median Income (AMI) The area median income is the midpoint of a region's income distribution.
   San Marcos is located within the Austin Round Rock MSA. Federal housing programs utilize the area median income as the basis for funding.
  - Example: the 2018 median family income for a family of 4 in the Austin Round Rock MSA is \$86,000
- <u>San Marcos Median Family Income</u> (MFI) The median family annual income for residents of the City of San Marcos as established by the most current data available from the U. S. Census Bureau. This term is defined by the Census Bureau as "The sum of income of all family members 15 years and older living in the household. Families are groups of two or more people (one of whom is the householder) related by birth, marriage, or adoption and residing together; all such people (including related subfamily members) are considered as members of one family.
  - o This number is expected to change from year to year as census records are updated.
  - Example: the 2012-2016 American Community Survey data shows that the Median San Marcos Family Income is \$46,736;
- Affordable Housing —Generally construed to mean that a low or moderate-income family can afford to
  buy or rent a decent quality dwelling without spending more than 30% of its income on shelter.
  Generally, affordable housing incentives will be targeted to persons earning 80% or less of the Area
  Median Income.
- Workforce Housing Housing for moderate-income workers in professions needed in all communities such as teachers, fire fighters, and nurses. Generally, workforce housing incentives are targeted to employees earning no more than 140% of Area Median Income
- <u>Location Efficient Areas</u> Areas (a) where transportation costs are low or where public investment will make transportation more affordable in the future, (b) that are located in close proximity to schools, health related facilities, amenities such as parks and childcare, vital retail establishments (pharmacy, groceries, etc.) and (c) are pedestrian/bicycle friendly.

#### **OWNER-OCCUPIED HOUSING**

#### ISSUES, GOALS, AND STRATEGIES FOR IMPLEMENTATION

#### 1. LOW RATES OF HOME OWNERSHIP

- a. Increase home ownership rate
  - i. Offer targeted homebuyer down payment/closing cost loan programs to encourage those who work in San Marcos to become San Marcos home owners. Review program viability and need for continuing funding during annual budget process. Homes must be located inside the corporate limits. Possible targets might include:
    - 1. First Time Homebuyers if funded through the CDBG program, homebuyers will be qualified using HUD income limits.
    - 2. Texas State Professors (continuation of existing program)
    - 3. Workforce incentive for school teachers, CTMC employees, Texas State University employees, veterans, and law enforcement professionals who do not earn more than 140% of San Marcos MFI. Generally, this will be targeted to employees working in San Marcos.
    - 4. City of San Marcos full-time employees who have successfully completed their probationary period. The City Manager may be authorized to review and approve applications by part-time employees on a case-by-case basis.
    - ii. Utilizing San Marcos economic development professionals (city staff & consultants) periodically evaluate new/expanding businesses to have a clearer understanding of the type of housing required and its availability and potential need for targeted homebuyer incentives.
  - iii. Maintain a "Housing" section on City's Webpage

#### 2. THERE IS A NEED FOR MORE DIVERSITY IN THE TYPES/SIZES OF HOUSING UNITS BEING PRODUCED

- a. Encourage the creation of a diverse housing stock
  - i. Review development codes to reduce/remove regulatory barriers to allow alternative housing types that foster affordability such as:
    - 1. Micro homes / efficiency dwelling units
    - 2. Mixed use buildings
    - 3. Zero-lot line homes
    - 4. Courtyard homes
    - 5. Industrial (pre-fab) housing that meets construction codes with design standards that will ensure the home is compatible with the surrounding area.
    - 6. Housing designed for persons with special needs

The Development Code shall establish criteria that ensures alternative housing is appropriately located.

- ii. Provide "pre-approved" building plans for micro/efficiency homes to builders who are constructing affordable housing to expedite review times and reduce up-front costs.
- b. Reduce builder's costs for owner-occupied affordable / workforce housing development
  - i. Review/modify development regulations that increase costs without clear rationale or benefit such as lot sizes, setbacks, parking requirements, street width standards
  - ii. Provide "pre-approved" building plans suitable for affordable / workforce housing
  - iii. Provide development code/construction permitting fee waivers and/or rebates for community-based non-profit organizations that build affordable housing for developers building affordable or workforce housing.
  - iv. Explore using development incentives to encourage developers to voluntarily include housing designed to be owner-occupied and affordable for low to moderate income households. Incentives might include:
    - 1. Considering an increase in height beyond five stores in the Downtown Smart Code District in proportion to the number of affordable units created.
    - 2. Developing an "affordable housing fund" program that accepts fee-in-lieu payments rather than the construction of affordable housing. As adequate funds accumulate, the City could acquire land to be used for affordable housing construction.
    - 3. Allowing developers to construct the affordable units in off-site locations (sites to be approved by the City at the time the development incentive is approved).
- c. Encourage in-fill housing development in older, established neighborhoods
  - i. Update the City's existing Infill Housing Incentive Program to provide incentives for affordable and/or workforce housing development.
  - ii. Coordinate as practical the affordable/workforce housing program with the Place Based Economic Development Policy.
  - iii. Market the programs to developers, realtors, and lenders.

#### 3. THE CITY'S AGING HOUSING STOCK AND OLDER NEIGHBORHOODS NEED TO BE MAINTAINED IN GOOD CONDITION.

- a. Reduce costs of renovating older homes while ensuring that modern safety concerns are addressed.
  - Review development code regulations applicable to non-conforming residential structures regarding repairs and modifications, reconstruction after destruction, and non-conforming moved structures to ensure that the standards provide maximum flexibility while not compromising safety.
- b. Assist low income homeowners with the costs of maintaining their homes.
  - i. Consider providing funding for housing rehabilitation programs that provide free housing rehab to low income families.
  - ii. Seek additional funding sources and identify potential non-profit partners to carry out housing rehab/reconstruction programs.

- c. Assist low income families to create developable lots on property with clouded titles.
  - Develop and/or sponsor programs that assist families in clearing title to real property which will facilitate the rehabilitation of dilapidated structures and the redevelopment of vacant lots.

# 4. HOUSING COSTS (OTHER THAN MORTGAGE PAYMENTS) CAN CREATE A BURDEN FOR LOW AND MODERATE INCOME PERSONS

- a. Reduce transportation costs through development of housing in Location Efficient Areas (LEA).
  - i. Define parameters for establishing Location Efficient Areas & review development codes to ensure they encourage affordable / workforce development therein.
  - ii. Identify areas appropriate for designation as a Local Efficient Area.
  - iii. Target incentives for development of affordable / workforce housing in LEAs.
- b. Improve energy efficiency to reduce housing costs.
  - i. Continue energy audit and indoor water survey programs, maintain funding for energy efficiency rebate programs, and continue public education about programs
  - ii. Utilize energy audits to identify low-income households with a history of very high utility bills whose energy use could be lowered through energy efficiency upgrades. Refer residents to available programs that assist with weatherization or other energy efficiency upgrades.
  - iii. Seek grants supporting this goal and evaluate feasibility of implementing them. The feasibility review shall include staffing requirements and associated costs compared to benefits from the grant.
  - iv. Periodically evaluate and analyze the impact energy efficiency development / improvements has on utility usage and costs.

#### 5. LAND ACQUISITION COSTS ARE PASSED ON TO HOMEBUYERS

- a. Increase supply of sites available for owner-occupied housing.
  - i. Enter into cooperative agreements with other taxing entities to create a program that will identify tax-forfeiture properties appropriate for residential development or redevelopment and made them available for affordable housing development.
  - ii. Evaluate existing city-owned property for suitability for residential development and donate appropriate sites to non-profit organizations to build affordable housing.
  - iii. Consider allocating funding to purchase land to be donated to community-based non-profit organizations (such as Habitat for Humanity) for affordable housing development.
  - iv. Utilize the City's Unsafe Structures Program to create clean, developable lots dedicated to affordable housing development.

#### **RENTAL HOUSING**

#### 1. THERE IS A NEED FOR MORE DIVERSITY IN THE TYPES/SIZES OF HOUSING UNITS BEING PRODUCED

- a. Encourage the creation of a diverse housing stock
  - i. Review development codes to reduce/remove regulatory barriers to allow alternative housing types that foster affordability such as:
    - 1. Micro homes / efficiency dwelling units
    - Accessory dwelling units with specific criteria for approval such as the primary dwelling must be the homestead of the homeowner and the house and accessory dwelling unit combined must still be able to comply with any applicable occupancy limits.
    - 3. Mixed use buildings
    - 4. Zero-lot line homes
    - 5. Courtyard homes
    - 6. Industrial (pre-fab) housing that meets construction codes with design standards that will ensure the home is compatible with the surrounding area.
    - 7. Housing designed for persons with special needs

The Development Code shall establish criteria that ensures alternative housing is appropriately located.

## 2. THE CITY'S AGING HOUSING STOCK AND OLDER NEIGHBORHOODS NEED TO BE MAINTAINED IN GOOD CONDITION.

- a. Reduce costs of renovating older homes while ensuring that modern safety concerns are addressed.
  - Review development code regulations applicable to non-conforming residential structures regarding repairs and modifications, reconstruction after destruction, and non-conforming moved structures to ensure that the standards provide maximum flexibility while not compromising safety.
- b. Ensure that aging rental units remain in compliance with safety codes.
  - i. Establish an inspection program that establishes periodic inspections and appropriate responses to complaints from residents
  - Consider adoption of an incentive program to encourage the renovation of small, older residential rental property; incentives might include fee rebates upon the unit passing final inspection.

#### 3. HOUSING COSTS (OTHER THAN RENT PAYMENTS) CAN CREATE A BURDEN FOR LOW AND MODERATE INCOME PERSONS

- a. Reduce transportation costs through development of housing in Location Efficient Areas (LEA).
  - i. Define parameters for establishing Location Efficient Areas & review development codes to ensure they encourage affordable / workforce development therein.

- ii. Identify areas appropriate for designation as a Local Efficient Area
- iii. Target incentives for development of affordable / workforce housing in LEAs.
- b. Improve energy efficiency to reduce housing costs.
  - i. Continue energy audit and indoor water survey programs, maintain funding for energy efficiency rebate programs, and continue public education about programs
  - ii. Utilize energy audits to identify low-income households with a history of very high utility bills whose energy use could be lowered through energy efficiency upgrades. Refer residents to available programs that assist with weatherization or other energy efficiency upgrades.

#### LOW INCOME HOUSING TAX CREDIT POLICY (LIHTC)

The City of San Marcos utilizes the following criteria and additional considerations to determine if a LIHTC project is consistent with the Comprehensive Plan and other policy documents related to housing.

#### Resolutions of Support / No Objection

Applications must fully meet at least five (5) of the eight (8) criteria below, including criteria #1, in order to receive a staff recommendation which is presented to the Workforce Housing Council Committee.

Applications must also receive a recommendation from the Workforce Housing Council Committee prior to consideration by City Council.

#### **Criteria**

- 1. No exemption from local taxes may be considered unless the project meets the criteria listed below. The purpose of this criteria is to help increase the City's inventory of affordable units and ensure that units benefiting from the program are reserved for low income households that need them.
  - a. A minimum of 15% of all units within the project shall be affordable to households at or below 30% percent of the AMI for the duration of the tax exemption.
  - b. A minimum of 10% of the units affordable to households at or below 30% of the AMI shall be ADA accessible.
  - c. A minimum of 35% of the units within a project that is not age-restricted shall include a minimum of three bedrooms in each unit.
  - d. The project shall include these criteria in the Texas Department of Housing and Community Affairs Land Use Restriction Agreement (LURA).
  - e. When considering a recommendation of support, preference should be given to projects that utilize a local entity for such tax exemptions.
- 2. The proposed units address a housing need identified in this housing policy or in the City's current consolidated plan for HUD programs.
- 3. The project is located within a high or medium intensity zone on the preferred scenario map.
- 4. The project is not proposed to develop under a legacy district on the City's current zoning map.
- 5. The project is located within half (.5) mile walking distance from services such as grocery, medical facilities, and schools.

- 6. The project is located within one quarter (.25) mile walking distance of a proposed or existing bus stop on a current or planned transit route. If the project is not located within one quarter (.25) mile walking distance of a proposed or existing bus stop on a current or planned transit route, a private shuttle service for residents is provided in accordance with TDHCA requirements.
- 7. The project is renovating or redeveloping an existing multifamily complex or under-performing development.
- 8. The project incorporates wraparound support services that provide flexible voluntary social, economic, or education benefits to the residents. Proposed support services should:
  - a. Meet the needs of the local community;
  - b. Utilize local support services and resources;
  - c. Exceed the minimum TDHCA requirements for amenities; and
  - d. Submit to the City the Project's TDHCA Application for Low Income Housing Tax Credits and includes the list of amenities in the Project's Land Use Restriction Agreement (LURA).

#### **Additional Considerations**

In addition to the criteria outlined above, the following may be considered by staff and the Workforce Housing Council Committee as means for recommending approval or denial of a request:

- 1) Regardless of compliance with the above criteria, projects located where emergency response times fall out of the National Fire Protection Association (NFPA) standards and / or projects located within or in close proximity to the floodplain may receive a denial recommendation.
- 2) Projects seeking tax exemption should
  - Include an estimate of the tax revenues which will not be realized by the City, annually, over the life of the project.
  - Describe future plans for placing the property back on the tax roll, if applicable.
- 3) For senior housing projects, inclusion of the following, additional, support service: presentations by the Capital Area Council of Governments (CAPCOG) Area Agency on Aging. Applicants must contact CAPCOG to arrange for a presentation of available services no less than once every other year and provide proof of this agreement with the application. <a href="https://www.capcog.org/divisions/area-agency-on-aging#areaagencyon-aging">https://www.capcog.org/divisions/area-agency-on-aging#areaagencyon-agin
- 4) For senior housing projects, the distance to medical facilities will receive additional scrutiny. Applicants must indicate the nearest medical facilities and any additional transportation options which will be available to residents in the event of an emergency.
- 5) Once approved, additional consideration will be given to applications which show compliance with the Strategic Housing Action Plan.

# PROPERTY OWNER AUTHORIZATION Brian Kimes \_\_\_\_(owner name) on behalf of San Marcos Land Holding-CCP, L.L.C. (company, if applicable) acknowledge that I/we am/are the rightful owner of the property located at 201 E McCarty Lane \_\_\_\_\_ (address). I hereby authorize Dylan Klopp (agent name) on behalf of JES Dev Co, Inc. (agent company) to file this application for Housing Tax Credit Resolution Application (application type), and, if necessary, to work with the Responsible Official / Department on my behalf throughout the process. Printed Name, Title: Brian Kimes, Authorized Rep. Form Updated October, 2019



# Appendix A Additional Responses

#### Page 1 – Description of Request

The proposed development is a 222-unit senior housing (55+) development which will include 1br and 2br apartment homes. The site amenities will include a clubhouse with activity room, fitness center, business center, library, and kitchen area. We chose the location for its proximity to grocery and retail.

#### Page 2 – Criteria

- 1. Our proposed development meets all requirements A-E of this section.
  - e. We will be partnering with Capital Area Housing Finance Corporation (CAHFC) on this development. They will act as the General Partner for this development and through their non-profit status will be the entity providing our eligibility for Property Tax Exemption.
- 2. Our proposed development will be rent and income restricted to an average of 60% AMI with 100% of the units reserved for affordable housing (no market rate units here). The units will target 30%, 60%, and 70% AMI which will allow us to rent apartment homes to a broader range of household incomes. We will comply with the City's requirement of 15% of the units restricted to 30% AMI. This will dovetail into the city's goal to help reduce housing cost burden in San Marcos (page 2 of 2020-2024 Consolidated Plan Final).
- 3. We are located within the "High Density" growth area. The site is located approximately where "Star Park" is written. Across the street (E McCarty Ln) from Texas State University.
- 4. Not within a legacy district.
- 5. The property is within 0.5 miles from the StoneCreek Crossing (shopping mall) which has a Target, My Emergency Room, CVS pharmacy, and other retail stores. Please see **Appendix F** for visual reference.
- 6. The property is not within 0.25 miles of a proposed or existing bus stop but will work to meet TDHCA requirements. The closest routes are Route #5 at the Target (~0.5 miles) and the #1 Hopkins line in the Phase 1 Route Network at The Village.
  - a. We are willing to work with the necessary groups to improve access to the bus system.
- 7. Not applicable. This is a new construction development.

8.

- a. We are addressing the concerns for Low- and Moderate- income housing options in the City of San Marcos.
- b. In addition to providing housing, we've reached out to CAPCOG to see if they can provide additional services for residents. Since we're still years out before we will have a property ready for residents to move-in, discussions have been at a high level and no formal commitments have been made. We're also committed to working with organizations like Portfolio Resident Services to provide services specific to the residents at our site. Services may include, tax preparation and social security/Medicare education. We'll also be partnering with Capital Area Housing Finance Corporation (CAHFC) on this development. They will be acting as the General Partner which will make the development eligible for a property tax exemption.

- c. The proposed development plans to exceed TDHCA's requirements for site amenities. Please see **Appendix B** for the current amenity selections.
- d. Upon completion of the Project's TDHCA Application for Low Income Housing Tax Credits, we will submit this and the Project's Land Use Restrictions Agreement (LURA) when they are available.

#### Page 3 - Additional Considerations

- 1. Not applicable.
- 2. Real Estate Tax analysis is attached as **Appendix C**.
  - a. The life of the property will exceed 50 years however the analysis we are showing is from the current year (2023) through when the property would be placed back on the tax roll (2042), 20 years total.
  - b. The tax exemption we are seeking would be in place from our Closing (2024) through the final year of our Tax Credit Compliance Period (2041), approximately 18 years total.
  - c. The taxes collected on unimproved land for the 20 years described in 2a, would be approximately \$900,000.
  - d. The taxes collected on the improved land for the 20 years, including the 18 years of being 100% tax exempt, would be approximately \$500,000.
  - e. The taxes collected on the improved land for the 20 years, without the tax exemption would be approximately \$7,775,000.
    - i. It should be noted that without a tax exemption, we are unable to build the development and improve the land.
  - f. Additional considerations:
    - i. The improved land would provide 222 homes for low- to moderate- income households, where the head of household is over 55 years of age.
    - ii. Comparable market rate apartment homes rent for an average of \$150 more per month than rent restricted apartment homes. Over an 15-year time period, the benefit to residents would be approximately \$7,400,000.
  - g. At the end of the 15-year compliance period, the partnership will be dissolved and the tax exemption will go away. The extended affordability period will remain in place.
- 3. We connected with CAPCOG and received a flyer with more information regarding their offerings (please see **Appendix D**). At present, it's too soon to enter into official agreements but we are committed to working with them for the benefit of the residents.
- 4. The property is within 0.5 miles to MY Emergency Room and a CVS Pharmacy.
- 5. The draft Strategic Housing Action Plan outlines the need for additional housing stock that is available to those of low- and moderate- income levels. Our proposed development is aimed at addressing that concern. With the construction 222 apartment homes, 100% of which are reserved for low- and moderate- income households.



# Appendix B Proposed Site Amenity Selection - TDHCA

Common Amenities 18 Points Minimum Required by TDHCA	Points
(2023 Qualified Action Plan)	
Community Space for Resident Support Services	
Multifunctional learning and care center(s) or conference room(s) with the appropriate furnishings to deliver the	0
Resident Supportive Services pertaining to classes or care for adults and selected by the Development Owner. The room(s) devoted to meeting this requirement must equal 10 square feet times the total number of Units, but need	
not exceed 1,000 square feet in total. This space must be separate from any other community space but may include	
a full kitchen. The room(s) must include storage space, such as closets or cabinetry (4 points);	
Multifunctional learning and care center(s) or conference room(s) with the appropriate furnishings to deliver the	0
Resident Supportive Services pertaining to classes or care for adults and selected by the Development Owner. The	U
room(s) devoted to meeting this requirement must equal 10 square feet times the total number of Units, but need	
not exceed 1,000 square feet in total. This space must be separate from any other community space but may include	
a full kitchen. The room(s) must include storage space, such as closets or cabinetry (2 points)	
Service provider office in addition to leasing offices (1 point);	0
Safety	Ü
Controlled gate access for entrance and exit areas, intended to provide access that is limited to the Development's	0
tenancy (1 point);	
Secured Entry (applicable only if all Unit entries are within the building's interior) (1 point);	1
Twenty-four hour, seven days a week monitored camera/security system in each building. Monitoring may be on-	0
site or off-site (2 points);	
Twenty-four hour, seven days a week recorded camera / security system in each building (1 point);	1
The provision of a courtesy patrol service that, at a minimum, answers after-hour resident phone calls regarding	0
noise and crime concerns or apartment rules violations and that can dispatch to the apartment community a	
courtesy patrol officer in a timely manner (3 points);	
Health / Fitness / Play	
Accessible walking/jogging path (1 point);	0
Furnished fitness center. Equipped with a variety of fitness equipment (at least one item for every 40 Units). Choose	1
from a specific list identified in the Qualified Action Plan. (1 point);	_
Furnished fitness center. Equipped with a variety of fitness equipment (at least one item for every 20 Units). Choose	0
from a specific list identified in the Qualified Action Plan. (2 points);	
One Children's Playscape Equipped for five to 12 year olds, or one Tot Lot. Must be covered with a shade canopy or	0
awning, intended to keep equipment cool, and provide shade and ultraviolet protection. This item can only be	
selected if clause (V) of this subparagraph is not selected; (2 points).	
Two Children's Playscapes Equipped for five to 12 year olds, two Tot Lots, or one of each. Must be covered with a	0
shade canopy or awning, intended to keep equipment cool, and provide shade and ultraviolet protection. This item	
can only be selected if the above playscape is not selected. (4 points)	
Horseshoe pit; putting green; shuffleboard court; pool table; ping pong table; or similar equipment in a dedicated	1
location accessible to all residents to play such games (1 point);	_
Swimming pool (5 points);	0
Splash pad/water feature play area (3 point);	0
Sport Court or field (including, but not limited to, Tennis, Basketball, Volleyball, Pickleball, Soccer or Baseball Field)	0
(2 points).	
Design / Landscaping	
Full perimeter fencing that contains the parking areas and all amenities (excludes guest or general public parking	0
areas) (2 points).	
Enclosed community sun porch or covered community porch/patio (1 point);	1
Dog Park area that is fully enclosed (the perimeter fencing may be used for part of the enclosure) and intended for	2
tenant owned dogs to run off leash (requires that the Development allow dogs) (2 point).	
Shaded rooftop or structural viewing deck of at least 500 square feet (2 points).	0
Porte-cochere (1 point);	1
Lighted pathways along all accessible routes (1 point);	0
A resident-run community garden with annual soil preparation and mulch provided by the Owner and access to	0
water (which may be subject to local water usage restrictions) (1 point).	
Community Resources	
Community Resources  Community laundry room with at least one washer and dryer for every 40 Units (2 points).	0
Barbecue grill and picnic table with at least one of each for every 50 Units (1 point). Grill must be permanently	0
installed (no portable grills).	

Business center with workstations and seating internet access, 1 printer and at least one scanner which may be	2
integrated with the printer, and either 2 desktop computers or laptops available to check-out upon request (2	
points).	
Furnished Community room (2 points).	2
Library with an accessible sitting area (separate from the community room) (1 point);	1
Activity Room stocked with supplies (Arts and Crafts, board games, etc.) (2 points);	2
Community Dining Room with full or warming kitchen furnished with adequate tables and seating (3 points);	3
Community Theater Room equipped with a 52 inch or larger screen or projection with surround sound equipment;	0
DVD player or a streaming service at no cost to residents; and seating (3 points).	
High-speed Wi-Fi with advanced telecommunications capacity as determined under 47 U.S.C. 1302 or more with	1
coverage throughout the clubhouse or community building (1 point).	
High-speed Wi-Fi with advanced telecommunications capacity as determined under 47 U.S.C. 1302 with coverage	0
throughout the Development (2 points).	
Bicycle parking that allows for, at a minimum, one bicycle for every five Units, within reasonable proximity to each	0
residential building that allows for bicycles to be secured with lock (lock not required to be provided to tenant) (1	
point).	
Package Lockers or secure package room. Automated Package Lockers or secure package room provided at a	0
location within the complex that can be accessed by residents 24/7 and at no charge to the resident. To qualify,	
there would need to be at least one locker for every eight residential units (2 points).	
Recycling Service (includes providing a storage location and service for pick-up) (1 point).	0
Community car vacuum station (1 point).	0
Access to onsite bike sharing services, provided tenants have short-term, autonomous access to community-owned	0
bicycles, with at least one bicycle per 25 Units (1 point).	<u> </u>
Total Points	19

Resident Support Services (Minimum of 8 points required)	Points
Shuttle, at least three days a week, to a grocery store and pharmacy or a major, big-box retailer that includes a grocery store and pharmacy, OR a daily shuttle, during the school year, to and from nearby schools not served by a school bus system for children who live at the Development (3.5 points);	0
Monthly transportation to community/social events such as mall trips, community theatre, bowling, organized tours, etc. (1 point).	0
Provide a High Quality Pre-Kindergarten (HQ Pre-K) program and associated educational space at the Development Site meeting the requirements of paragraph (5)(C)(i)(I) of the Qualified Action Plan. (Half of the points required under this paragraph); and	0
Twelve hours of weekly, organized, on-site services provided to K-12 children by a dedicated service coordinator or third-party entity. Services include after-school and summer care and tutoring, recreational activities, character building programs, mentee opportunities, test preparation, and similar activities that promote the betterment and growth of children and young adults (3.5 points).	0
Four hours of weekly, organized, in-person, hybrid, or live virtual classes accessible to participants from a common area on site to an adult audience by persons skilled or trained in the subject matter being presented, such as English as a second language classes, computer training, financial literacy courses, homebuyer counseling, health education courses, certification courses, GED preparation classes, resume and interview preparatory classes, general presentations about community services and resources, and any other course, class, or presentation that may equip residents with new skills that they may wish to develop (3.5 points);	0
Annual income tax preparation (offered by an income tax prep service) or IRS-certified VITA (Volunteer Income Tax Assistance) program (offered by a qualified individual) that also emphasizes how to claim the Earned Income Tax Credit (1 point);	1
Contracted career training and placement partnerships with local work source offices, culinary programs, or vocational counseling services; may include resident training programs that train and hire residents for job opportunities inside the development in areas like leasing, tenant services, maintenance, landscaping, or food and beverage operation (2 points);	0
Reporting rent payments to credit bureaus for any resident who affirmatively elects to participate, which will be a requirement of the LURA for the duration of the Affordability Period (2 points).	2
Food pantry consisting of an assortment of non-perishable food items and common household items (i.e. laundry detergent, toiletries, etc.) accessible to residents at least on a monthly basis or upon request by a resident. While it	0

Total Points	8
program or scholarships to residents who may attend college (2 points).	
Provision, by either the Development Owner or a community partner, of an education tuition- or savings-match	0
(2 points); and	
third-party to provide the equivalent of 15 hours or more of weekly resident supportive services at the Development	
A part-time resident services coordinator with a dedicated office space at the Development or a contract with a	0
unplanned pregnancies; and encourages the formation and maintenance of two-parent families (1 point);	
government benefits by promoting job preparation, work and marriage; prevents and reduces the incidence of	
children to be cared for in their homes or the homes of relatives; ends the dependence of needy families on	
Any of the programs described under Title IV-A of the Social Security Act (42 U.S.C. §§601, et seq.) which enables	0
monitoring purposes (2 points);	
where the service is provided for Persons with Disabilities and documentation to that effect can be provided for	
quarterly preventative maintenance including light bulb replacement) for Elderly Developments or Developments	
Weekly home chore services (such as valet trash removal, assistance with recycling, furniture movement, etc., and	0
external, contracted parties for seniors, Persons with Disabilities or Supportive Housing (3 points);	
Specific service coordination services offered by a qualified Owner or Developer, qualified provider or through	0
holiday celebrations, etc.) (1 point);	
Twice monthly on-site social events (i.e. potluck dinners, game night, sing-a-longs, movie nights, birthday parties,	1
Twice monthly arts, crafts, and other recreational activities (e.g. Book Clubs and creative writing classes) (1 point);	0
Notary Services during regular business hours (§2306.6710(b)(3)) (1 point);	1
out, swimming, card games, etc.) (2 points);	
activities intended to foster relationships with residents (such activities could include playing sports, having a cook-	
Partnership with local law enforcement or local first responders to provide quarterly on-site social and interactive	2
purposes (2 points).	
service is provided for Persons with Disabilities and documentation to that effect can be provided for monitoring	Ū
Contracted onsite occupational or physical therapy services for Elderly Developments or Developments where the	0
Weekly exercise classes (offered at times when most residents would be likely to attend) (2 points); and	0
Annual health fair provided by a health care professional (1 point);	1
s possible that transportation may be provided to a local food bank to meet the requirement of this resident service, the resident must not be required to pay for the items they receive at the food bank (2 points);	



# Appendix C Property Tax Analysis

#### **Tax Analysis Summary**

San Marcos, TX

			As	ssessed Value		Taxes -				Benefit to	
				(land plus		Unimproved	Ta	xes - Completed	Taxes - w/	Residents via	
Year	Tax Exemption	Tax Rate	im	provements)	Taxable Value	Vacant Land		Development	Abatement	Lower Rent	Property Status
2023	0.0%	1.902000	\$	2,463,310	\$ 2,463,310	\$ 46,852	\$	46,852	\$ 46,852	\$ -	
2024	100.0%	1.902000	\$	2,463,310	\$ -	\$ 46,852	\$	46,852	\$ -	\$ -	Closing Year
2025	100.0%	1.902000	\$	2,463,310	\$ -	\$ 46,852	\$	46,852	\$ -	\$ -	Under Construction
2026	100.0%	1.902000	\$	2,463,310	\$ -	\$ 46,852	\$	46,852	\$ -	\$ -	Under Construction
2027	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 399,600	Completed - Fully Occupied
2028	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 411,588	Fully Occupied
2029	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 423,936	Fully Occupied
2030	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 436,654	Fully Occupied
2031	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 449,753	Fully Occupied
2032	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 463,246	Fully Occupied
2033	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 477,143	Fully Occupied
2034	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 491,458	Fully Occupied
2035	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 506,201	Fully Occupied
2036	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 521,387	Fully Occupied
2037	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 537,029	Fully Occupied
2038	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 553,140	Fully Occupied
2039	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 569,734	Fully Occupied
2040	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 586,826	Fully Occupied
2041	100.0%	1.902000	\$	24,963,310	\$ -	\$ 46,852	\$	474,802	\$ -	\$ 604,431	Final Year of Tax Abatement
2042	0.0%	1.902000	\$	24,963,310	\$ 24,963,310	\$ 46,852	\$	474,802	\$ 474,802	\$ 622,564	
·	•	•		•	•	\$ 937,043	\$	7,784,243	\$ 521,654	\$ 8,054,690	

Note: Assessed land value came from Hays County Assessors Office website Note: Millage rates come from Hays County Tax Rates and Exemptions for 2023

Note: Estimated Improvement Value is based on Assessor's Office valuation methodology

#### Proposed Development - Blanco Basin (Senior Independent Living)

San Marcos, TX

#### 2023 Assessed Values and Millage Rates

Assessed Values			Tax Year	Taxing Unit	Tax Rate	Exemptions	Taxable	Tax
Land Value	\$	2,463,310	2023	City of San Marcos	0.603000	-	\$ 2,463,310	\$ 14,853.76
Improvement		-	2023	Hays County	0.287500	-	\$ 2,463,310	\$ 7,082.02
AG Market		-	2023	San Marcos CISD	0.991500	-	\$ 2,463,310	\$ 24,423.72
AG Use		-	2023	Special Road Dist	0.020000	-	\$ 2,463,310	\$ 492.66
Timber Market		-		Total	1.902000			\$ 46,852.16
Timber Use		-						
Cap Adjustment		=						

#### **Assessed Value History**

**Assessed Value** 

**Assessed Value** 

Year	Asse	Assessed Value					
2023	\$	2,463,310	154.3%				
2022	\$	968,820	30.2%				
2021	\$	744,340	0.0%				
2020	\$	744,340	18.8%				
2019	\$	626,550	-15.0%				
2018	\$	736,810	6.8%				
2017	\$	689,990					

2,463,310

\$

#### **Completed Development (Estimate - No Exemptions)**

Property Values			Tax Year	<b>Taxing Unit</b>	Tax Rate	Exemptions	Taxable	Тах
Land Value	\$	2,463,310	2023	City of San Marcos	0.603000	-	\$ 24,963,310	\$ 150,528.76
Improvement		22,500,000	2023	Hays County	0.287500	-	\$ 24,963,310	\$ 71,769.52
AG Market		-	2023	San Marcos CISD	0.991500	-	\$ 24,963,310	\$ 247,511.22
AG Use		-	2023	Special Road Dist	0.020000	-	\$ 24,963,310	\$ 4,992.66
Timber Market		-		Total	1.902000			\$ 474,802.16
Timber Use		-						
Cap Adjustment		_						

Note: Assessed land value came from Hays County Assessors Office website

Note: Millage rates come from Hays County Tax Rates and Exemptions for 2023

Note: Estimated Improvement Value is based on Assessor's Office valuation methodology

24,963,310

#### Resident Benefit of Rent and Income Restricted Properties

San Marcos, TX

#### 2 Bedroom Rent - Monthly

Market Rent (average)	\$ 1,630														
Rent Restricted (60% AMI)	 1,480														
Resident Savings	\$ 150														
2 Bedroom Rent - Annual	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>	<u>14</u>	<u>15</u>
Market Rent (average)	\$ 19,560 \$	20,147 \$	20,751 \$	21,374 \$	22,015 \$	22,675 \$	23,356 \$	24,056 \$	24,778 \$	25,521 \$	26,287 \$	27,076 \$	27,888 \$	28,725 \$	29,586
Rent Restricted (60% AMI)	 17,760	18,293	18,842	19,407	19,989	20,589	21,206	21,843	22,498	23,173	23,868	24,584	25,322	26,081	26,864
Resident Savings	\$ 1,800 \$	1,854 \$	1,910 \$	1,967 \$	2,026 \$	2,087 \$	2,149 \$	2,214 \$	2,280 \$	2,349 \$	2,419 \$	2,492 \$	2,566 \$	2,643 \$	2,723
Lifetime Savings	\$ 33,478														
Total Units	 222														
	\$ 7,432,126														

Note: Market Rent for Garden and Low-Rise, Class B properties Note: Restricted Rent is Gross 60% AMI less Utility Allowance

Note: Annual Rent Increase is 3.0%



# Appendix D CAPCOG Flyer







## We advocate for and support the health, safety and well being of adults 60 and older.

**Information & Referral/Assistance** — Helps older adults find and access community resources, programs, and services.

**Benefits Counseling** — Educates and advises older adults and caregivers about insurance issues, benefits and consumer problems related to Medicare & other public benefits.

**Ombudsman Program** — Advocates for older adults living in nursing or assisted living facilities.

**Health and Wellness** — Promotes and assists with healthy aging, such as physical activity and fall prevention, with the goal of supporting the independence of older adults.

**Care Coordination** — Coordinates short-term services for older adults who are recuperating at home after a health care crisis.

**Caregiver Support Services** — Provides support to people who care for an older adult or someone with a disability; grandparents or non-parent relatives age 55 or older with formal or informal custody of a child age 18 years or younger.

**Nutrition Programs** — Provides in-home and group setting meals.

**Medication Screening** — Reviews prescribed or over the counter medications, supplements, and ointments; summarizing their purpose to inform about potential negative interactions and give tips for safe medication management.

**Aging and Disability Resource Center** — Assists with finding resources for housing, transportation, and long-term care services and supports for older adults, people with disabilities and their caregivers.

Area Agency of the Capital Area 1-888-622-9111 or 512-916-6062 E-mail: aaainfo@capcog.org

Aging and Disability Resource Center of the Capital Area 1-855-YES-ADRC or 1-855-937-2372 E-mail: adrc@capcog.org

**AAACAP.ORG and ADRCCAP.ORG** 







## Defendemos y apoyamos la salud, la seguridad y el bienestar de los adultos de 60 años y mayores.

**Información y Referencia** — Ayudar a las personas de mayor edad en la busqueda y en el acceso de recursos, programas y servicios en sus areas locales.

**Orientación Sobre Beneficios** — Educar y aconsejar adultos mayores y cuidadores sobre problemas de seguro médico, beneficios y problemas relacionados con Medicare u otros beneficios públicos.

**Programa de Ombudsman de Atención a Largo Plazo** — El Ombudsman (Defendor) defiende la calidad de vida y atención de los residentes de entorno residencial, como una casa para convalecientes y viviendas en residencias asistidas.

**Salud y Bienestar** — Promover y ayudar con el envejecimiento saludable, como la actividad física y la prevención de caídas, con el objetivo de apoyar la independencia de los adultos mayores.

**Coordinación de Cuidado** — Coordinar los servicios a corto plazo para las personas quien están recuperando en casa de una crisis médica.

**Servicios de Apoyo para Cuidadores** — Brindar apoyo a las personas que cuidan de un adulto mayor o de una persona con discapacidad. Servicios disponibles para abuelos u otro familiar de 55 años o más (distintos de los padres), que tengan custodia formal/informal de un niño de 18 años o menor.

**Programas de Nutrición** — Proveer comidas a domicilio o en entornos de grupo.

**Evaluación de Medicamentos** — Revisión completa de medicamentos prescritos y sin receta por un farmacéutico. Recibirá un informe personalizado de consejos informativos y alertas sobre posibles interacciones negativas y sugerencias para el manejo seguro de medicamentos.

#### Centro de Recursos para Adultos Mayores y Personas

**Discapacitadas** — Ayudar a encontrar recursos para la vivienda, transporte y servicios de atención u otros tipos de apoyo a largo plazo para adultos mayores, personas con discapacidades y sus cuidadores.

# Agencia para Adultos Mayores de la Área de la Capital

1-888-622-9111 or 512-916-6062 E-mail: aaainfo@capcog.org

Centro de Recursos para Adultos Mayores y Personas Discapacitadas

1-855-YES-ADRC or 1-855-937-2372 E-mail: adrc@capcog.org

AAACAP.ORG y ADRCCAP.ORG

Se proporcionan servicios a los condados de Bastrop, Blanco, Burnet, Caldwell, Fayette, Hays, Lee, Llano, Travis y Williamson.

Financiado en parte por el Departamento de Salud y Servicios Humanos de Texas



# Appendix E Survey and Legal Description

# VICINITY MAP

#### JUAN MARTIN VERAMENDI SURVEY ABSTRACT NO. 17

TITLE COMMITMENT NOTES:

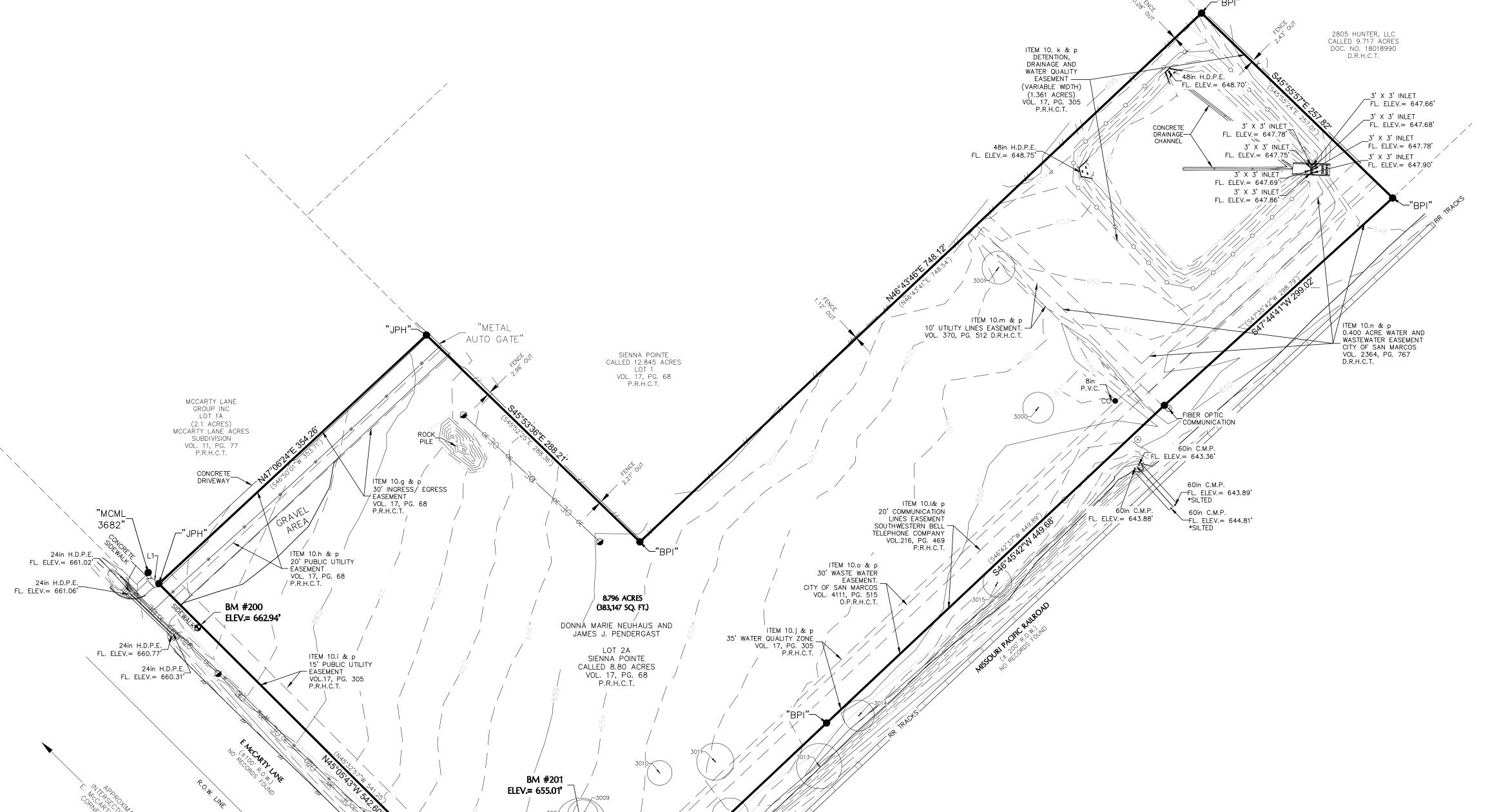
COMMITMENT FOR TITLE INSURANCE PREPARED BY CHICAGO TITLE INSURANCE COMPANY, GF. NO. 21-4570-C, EFFECTIVE DATE OF JUNE 28, 2022, AND

THE SURVEYOR HAS RELIED SOLELY UPON SAID TITLE COMMITMENT FOR THE DEPICTION OF EASEMENTS, RESTRICTIONS AND OTHER MATTERS AFFECTING THIS PROPERTY. NO ADDITIONAL RESEARCH WAS PERFORMED FOR THE PURPOSE OF THIS SURVEY. ITEMS LISTED ARE WORDED ACCORDING TO SAID TITLE COMMITMENT, FOLLOWED BY SURVEYORS NOTES SHOWN IN BRACKETS [ ]

- g.30' INGRESS/EGRESS EASEMENT ALONG THE NORTHWEST PROPERTY LINE, AS SHOWN ON PLAT RECORDED IN VOLUME 17, PAGE 305, PLAT RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- h.20' PUBLIC UTILITY EASEMENT PARALLEL AND ADJACENT TO THE NORTHWEST PROPERTY LINE, AS SHOWN ON PLAT RECORDED IN VOLUME 17, PAGE 305, PLAT RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- i. 15' PUBLIC UTILITY EASEMENT ALONG THE SOUTHWEST PROPERTY LINE, AS SHOWN ON PLAT RECORDED IN VOLUME 17, PAGE 305, PLAT RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- j.30' WATER QUALITY ZONE ALONG THE SOUTHEAST PROPERTY LINE, AS SHOWN ON PLAT RECORDED IN VOLUME 17, PAGE 305, PLAT RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- k.DETENTION, DRAINAGE, AND WATER QUALITY EASEMENT OF VARYING WIDTH LOCATED IN THE MOST NORTHEAST PORTION OF PROPERTY, AS SHOWN ON PLAT RECORDED IN VOLUME 17, PAGE 305, PLAT RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- I. EASEMENT GRANTED TO SOUTHWESTERN BELL TELEPHONE COMPANY BY HAROLD H. FEHLIS, ET AL, RECORDED IN VOLUME 216, PAGE 469, DEED RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- m.INGRESS AND EGRESS EASEMENT 10' WIDE AS RESERVED IN VOLUME 370, PAGE 512, DEED RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON]
- n.EASEMENT GRANTED TO CITY OF SAN MARCOS, BY TORRIBIO TORRES AND WIFE, ROMALDA TORRES, RECORDED IN VOLUME 2364, PAGE 767, OFFICIAL PUBLIC RECORDS OF HAYS COUNTY, TEXAS. [SUBJECT TO, AS SHOWN HEREON] O.EASEMENT GRANTED TO CITY OF SAN MARCOS, BY DONNA MARIE NEUHAUS AND JAMES J. PENDERGAST, RECORDED IN VOLUME 4111 PAGE 515, OFFICIAL PUBLIC RECORDS OF HAYS COUNTY, TEXAS.
- [SUBJECT TO, AS SHOWN HEREON] p.TERMS, CONDITIONS AND STIPULATIONS OF THAT CERTAIN SUBDIVISION IMPROVEMENT AGREEMENT RECORDED IN VOLUME 4607, PAGE 762, OFFICIAL PUBLIC RECORDS OF HAYS COUNTY, TEXAS.
- [SUBJECT TO, NOT SHOWN HEREON] q.EASEMENT GRANTED TO CAP AREA SIENNA POINTE HOLDINGS, LLC, BY DONNA M. NEUHAUS AND JAMES J. PENDERGAST, RECORDED IN VOLUME 4608, PAGE 500, OFFICIAL PUBLIC RECORDS OF HAYS COUNTY, TEXAS.

[SUBJECT TO, NOT SHOWN HEREON]

# ALTA/NSPS LAND TITLE SURVEY OF A 8.796 ACRES OUT OF JUAN MARTIN VERAMENDI SURVEY, ABSTRACT 17, HAYS COUNTY, TEXAS



ITEM 10.1 & p

P.R.H.C.T.

3.9' X 2.9' BOX CULVERT FL. ELEV.= 654.80'

3.9' X 2.9' BOX CULVERT

FL. ELEV.= 654.76'

3.9' X 2.9' BOX CULVERT\_

3.9' X 2.9' BOX CULVERT

FL. ELEV.= 654.80'

FL. ELEV.= 654.75'

"HAYS COUNTY

MAINTENANCE BEGINS"-

3.9' X 2.9' BOX CULVERT FL. ELEV.= 654.78'

3.9' X 2.9' BOX CULVERT FL. ELEV.= 654.77'

3.9' X 2.9' BOX CULVERT

FL. ELEV.= 654.70'

3.9' X 2.9' BOX CULVERT

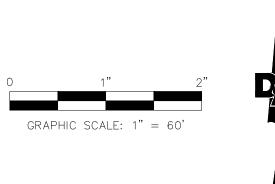
FL. ELEV.= 654.79'

20'X20' COMMUNICATION LINES EASEMENT SOUTHWESTERN BELL TELEPHONE COMPANY

— — EXISTING EASEMENT - - - - - ADJOINER PROPERTY LINE ----- OE------ OVERHEAD ELECTRIC \_\_\_\_\_ X \_\_\_\_ EXISTING WIRE FENCE O EXISTING CHAINLINK FENCE \_\_\_\_\_\_\_ EDGE OF PAVEMENT [UNLESS NOTED] 1/2" IRON ROD WITH "DOUCET" CAP SET CLEAN OUT TELEPHONE PULL BOX MARKER POST [AS NOTED] SIGN [AS NOTED] POWER POLE DOWN GUY BENCHMARK FOUND WASTEWATER MANHOLE DOCUMENT NUMBER VOLUME PAGE R.O.W. RIGHT-OF-WAY C.M.P. CORRUGATED METAL PIPE HIGH DENSITY POLYETHYLENE PLAT RECORDS, HAYS P.R.H.C.T. COUNTY, TEXAS
OFFICIAL PUBLIC RECORDS,
HAYS COUNTY, TEXAS 0.P.R.H.C.T. DEED RECORDS, HAYS COUNTY, TEXAS D.R.H.C.T. RECORD INFORMATION

LEGEND

SITE ADDRESS: 201 E MCCARTY LANE, SAN MARCOS, TX 78666



LINE TABLE LINE BEARING DISTANCE L1 N43°41'48"W 15.00'

	TREE TABLE
NUMBER	SIZE(IN) SPECIES CRZ(FT) MT(
3000	15" HACKBERRY 30'
3001	16" HACKBERRY 32'
3002	15" CEDAR ELM 30'
3003	12" CEDAR ELM 24'
3004	25" COTTONWOOD 50'
3005	22" COTTONWOOD 44'
3006	28" COTTONWOOD 56' 22 13
3007	11" COTTONWOOD 22'
3008	14" COTTONWOOD 28'
3009	15" TALLOW 30'
3010	12" CEDAR ELM 24'
3011	18" HACKBERRY 36'
3012	18" HACKBERRY 36'
3013	22" HACKBERRY 44' 14 11 7
3014	15" HACKBERRY 30'
3015	14" HACKBERRY 28'

LEGAL DESCRIPTION:
LOT 2A, AMENDED PLAT OF MCCARTY LANE ACRES, LOT 1, AND SIENNA POINTE, LOT 2, A
SUBDIVISION IN HAYS COUNTY, TEXAS, ACCORDING TO THE MAP OR PLAT THEREOF RECORDED
IN VOLUME 17, PAGE 305, PLAT RECORDS OF HAYS COUNTY, TEXAS

FLOODPLAIN NOTE: THIS PROPERTY IS LOCATED WITHIN UNSHADED ZONE "X" (AREA OF MINIMAL FLOOD HAZARD) AS SHOWN ON THE FLOOD INSURANCE RATE MAPS NO. 48209C0476F MAP REVISED SEPTEMBER 2, 2005 AND ISSUED BY FEMA FOR HAYS COUNTY, TEXAS. THIS FLOOD STATEMENT DOES NOT IMPLY THAT THE PROPERTY AND/OR THE STRUCTURES THEREON WILL BE FREE FROM FLOODING OR FLOOD DAMAGE. THIS FLOOD STATEMENT SHALL NOT CREATE LIABILITY ON THE PART OF THE SURVEYOR.

CONTROL NOTE:
BASIS OF BEARING IS THE TEXAS COORDINATE SYSTEM, SOUTH CENTRAL ZONE [4204], NAD 83 (2011), EPOCH 2010. ALL DISTANCES SHOWN ARE GRID VALUES US SURVEY FEET.

ELEVATION: 662.94'

DESCRIPTION: MAGNAIL W/SHINER FOUND JPH STAMPED, LOCATED AT THE EASTERN SIDEWALK ON THE NORTHEAST CORNER APPROXIMATELY 32 FEET NORTH FROM THE NORTH R.O.W LINE OF E. McCARTY LANE. [SHOWN HEREON]



ate: 10/06/2022 cale: 1" = 60'rawn by: JRT roject: 2451-002

neet: 1 OF 1

ield Book: 551

Party Chief: ADM

SURVEYOR'S CERTIFICATE: TO: DONNA MARIE NEUHAUS A/K/ DONNA M. NEUHAUS, JAMES J. PENDERGAST AND OLD REPUBLIC NATIONAL TITLE INSURANCE COMPANY

THIS IS TO CERTIFY THAT THIS MAP OR PLAT AND THE SURVEY ON WHICH IT IS BASED WERE MADE IN ACCORDANCE WITH THE 2021 MINIMUM STANDARD DETAIL REQUIREMENTS FOR ALTA/NSPS LAND TITLE SURVEYS. JOINTLY ESTABLISHED AND ADOPTED BY ALTA AND NSPS, AND INCLUDES 1-4, 7A, 8, 9, 13, AND 14 OF TABLE A THEREOF. THE FIELD WORK WAS COMPLETED SEPTEMBER

10/06/2022 CHRISTOPHER W. TERRY REGISTERED PROFESSIONAL LAND SURVEYOR TEXAS REGISTRATION NO. 6649

DOUCET & ASSOCIATES, INC. CTERRY@DOUCETENGINEERS.COM



Civil Engineering // Entitlements // Geospatial 7401 B. Highway 71 W, Ste. 160 Austin, TX 78735, Tel: (512)-583-2600 www.doucetengineers.com TBPE Firm Number: 3937

TBPELS Firm Number: 10105800 Survey Date: 08/25/201



# Appendix F Map Showing Site and Proximity to Community Amenities

