

AFFORDABLE HOUSING ADVISORY COMMITTEE
LOCATION: ROOM 2000
CITY HALL
THURSDAY, JUNE 7, 2012, 7:00PM

AGENDA

- | | |
|---|-----------|
| 1. Consideration of the Minutes of May 2, 2012 meeting | 7:00 p.m. |
| 2. Consideration of CLI Funding Request for 612 Notabene Drive | 7:05 p.m. |
| 3. Ratify votes approved as a committee of the whole | 7:35 p.m. |
| a) Braddock Metro Place Affordable Housing Plan (Provided at March meeting) | |
| b) February meeting minutes (provided at March meeting) | |
| c) The Delaney Affordable Housing Plan (provided at May meeting) | |
| d) April meeting minutes (provided at May meeting) | |
| 4. AHAC FY 12 Annual Report | 7:45 p.m. |
| 5. Discussion of Beauregard Small Area Plan Approval | 8:00 p.m. |
| 6. Information Items: | 8:15 p.m. |
| a. Housing Trust Fund Financial Summary for April 2012 | |
| b. Housing Opportunities Fund Financial Status for April 2012 | |
| c. Homeownership Programs Report for April 2012 | |
| 7. Announcements and Upcoming Housing Meetings | 8:20 p.m. |
| 8. Adjournment | 8:30 p.m. |

AFFORDABLE HOUSING ADVISORY COMMITTEE
Minutes of the Meeting of May 2, 2012

Members Present

Michael Caison, Chair
Bill Harris
Laura Lantzy
Rick Liu
Carter Fleming

Staff Present

Mildrilyn Davis
Helen McIlvaine
Eric Keeler
Jon Frederick

Guests

Duncan Blair, Esquire
Stephen Bannister
Dipti Pidikiti-Smith
Annabelle Fisher
Chuck Benagh

The regular monthly meeting of the Affordable Housing Advisory Committee, was held in the Sister Cities Room of the City Hall, and was called to order at 6:30 P.M. by Michael Caison, Chair.

1. Caison called for consideration of the affordable housing plan for The Delany.
 - a. Caison asked Jon Frederick to comment on the Office of Housing’s recommendation to approve the affordable housing plan for The Delaney. He advised the plan provides for 23 of the 189 units to be set-aside as “affordable.” Floor plans and amenities will be the same for all similar units in the development. The Office of Housing determined the \$3,209,800 value over time of the 23 affordable units was a better value to the city than the alternative option of a cash contribution of \$592,083.
 - b. Duncan Blair, Esq., spoke for the developer. The project will replace a bowling alley in a commercial area. The benefits offered to the City clearly merit rezoning to increase height and density. The developer is working closely with representatives of the Cameron Station community, located to the rear of the project. When asked about how many units would be “accessible” or “adaptable” he responded the project fully complies with current law. When pushed further on whether the developer had considered building to “universal design” standards. Blair responded that if the City expects buildings to be built on Universal Design standards that expectation should be made known at the beginning of the planning process and not after the design has been completed.
 - c. As there was not a quorum it was agreed by consent to act as a committee of the whole. Harris moved and Liu seconded approval of the Office of Housing’s recommendation to approve the project. The vote was 4 yea, 0 no, and 1 abstentions.

2. Caison called for the approval of the Minutes of the April 5, 2012 meeting. Again, by consent acting as a committee of the whole, Liu moved and Harris seconded approval of the Minutes as distributed. The vote was unanimous approval.

Caison adjourned the meeting at 7:00 P.M.

Respectfully submitted,

Bill Harris, Secretary pro tem

#2

City of Alexandria, Virginia

MEMORANDUM

DATE: JUNE 7, 2012

TO: AFFORDABLE HOUSING ADVISORY COMMITTEE

FROM: MILDRILYN STEPHENS DAVIS, DIRECTOR, OFFICE OF HOUSING *msd*

SUBJECT: CONSIDERATION OF A FUNDING APPLICATION FROM COMMUNITY LODGINGS, INC. (CLI) FOR A \$300,000 LOAN FROM THE HOUSING OPPORTUNITIES FUND

ISSUE: Funding request for \$300,000 in gap financing to renovate 612 Notabene Drive.

RECOMMENDATION: That the Committee approves a \$300,000 loan from the HOME Funds portion of the Housing Opportunities Fund.

BACKGROUND: Community Lodgings, Inc. (CLI) is a local non-profit organization, established in 1987, to preserve affordable housing, provide transitional housing for the homeless, and to help families become self sufficient through counseling and supportive services programs. CLI owns and operates a 28-unit rental property in the three buildings located at 3908, 3912 and 3916 Elbert Avenue, as well as two rental properties at 607 (6 units) and 612 Notabene Drive (10 units). Four residential units at 607 Notabene Drive were converted in 2006 for use as a Learning Center. All of CLI's properties are older, garden-style apartments, built in the early 1940s and are located in the Arlandria section of the City. CLI currently operates 14 units of transitional shelter for the homeless and 30 units of affordable housing. A zoning variance for the Elbert Avenue property permits CLI to maintain offices on site.

The City has previously provided funds in the form of loans and grants to assist with CLI's initial purchase and rehabilitation of these properties. One loan has been repaid, others have been refinanced, with the original loan terms extended, to improve cash flow and all are current on their payments. City loan funding for the properties is summarized below:

Property	Purpose	Original Amount	Source	Current Balance	Final Payment
607 Notabene	Acquisition	\$100,000	HTF	0	Paid
612 Notabene	Acquisition	\$100,000	HTF	\$4,872	07/2014
607-12 Notabene	Rehabilitation	\$ 25,000	Low/Mod Housing	\$1,344	01/2013
Elbert Avenue	Acquisition	\$300,000	HTF	\$55,772	10/2014
Elbert Avenue	Rehabilitation	\$46,512	HOF/HOME	\$49,302	11/2024
Total Amount		\$576,512		\$111,290	

DISCUSSION: In its current request, CLI is asking that the City provide a loan of \$300,000 as gap financing for renovation of the 612 Notabene Drive. CLI is working with HomeAid¹ Northern Virginia which builds and renovates homeless shelters, transitional houses, food banks, medical clinics, counseling centers, and other facilities that help homeless people gain stability and a roof over their heads. HomeAid leverages the resources of the homebuilding community and its corporate partners to conduct major renovations to shelters and homes to provide safe, stable and new living arrangements for previously homeless persons. HomeAid's partners and resources help to significantly reduce the construction costs to care provider organizations; thereby allowing them redirect those dollars back into programs and services for these homeless families and individuals.

The renovation plans for the 10-unit building (6 two bedrooms and 4 one bedrooms) include: new windows, doors, HVAC system replacement, an electrical and plumbing upgrade, a new roof, bathroom and kitchen upgrades (including new appliances, fixtures, and cabinets), common area updates and new flooring. The projected development schedule is for CLI to start rehabilitation in September with construction completed in December. The per unit cost for the renovation is \$84,200, of which the requested City investment will be \$30,000 a unit.

The estimated total cost of the rehabilitation is \$842,000 for construction costs, architectural fees, and insurance. The sources for the project include \$272,000 in savings from HomeAid (due to donated labor and materials), a \$25,000 predevelopment loan from the City, \$240,000 in financing from CLI private sources and the proposed \$300,000 loan from the City. The original request for a loan of \$500,000 was made in June 2011. In working with CLI and its partners to help leverage third party sources, the request for gap financing was reduced to \$300,000. CLI plans to draw on \$240,000 in private financing through a BB&T equity line of credit. This will either be replaced with grant funds that CLI has requested (application is pending) or can be converted into a long term loan which the property will pay off from its revenues.

In any of these scenarios, both CLI's equity position in the property will still be very strong. The 2012 assessed value of the Notabene property is \$1,055,985, so even with debt from the existing mortgages of \$146,950, an addition loan of \$240,000 in new private funding from BB&T, and the proposed \$300,000 City loan, the LTV (loan to value) ratio will be 65%. CLI has requested grant funding from the Freddie Mac Foundation which, if awarded, would take out the BB&T line of credit financing. This strategy is proposed due to the urgency of the renovation (the building may otherwise become uninhabitable) and the opportunity to leverage donated materials and labor through HomeAid now. It is noted that to help CLI take advantage of the tremendous opportunity to partner with HomeAid in the renovation, in March 2012 the Office of Housing provided a predevelopment loan² of \$25,000 so that architectural and engineering services could be completed

¹ HomeAid is a leading national non-profit provider of housing for today's homeless. The organization builds and renovates multi-unit shelters for America's temporarily homeless families and individuals, more than one million of whom are children, while they rebuild their lives. Founded in 1989 by the Orange County chapter of the Building Industry Association of Southern California (BIA/SC), HomeAid is an affiliate of the National Association of Home Builders (NAHB). HomeAid has expanded throughout the country to 18 chapters in 12 states and one national office (headquarters): Irvine, CA and two regional offices: Pensacola, FL and Roseville, CA.

² The Office of Housing has administrative authority to approve predevelopment loans. These funds are consolidated into the final loan, if the project is feasible to go forward and requires City gap financing.

and HomeAid's could develop cost estimates through its network of contractors.

As a condition of grant funding in 2006 for window replacement at the Elbert Avenue Apartments, the City required CLI to conduct a third party capital needs assessment. All of the work items that were identified in that assessment are being addressed in this renovation. Another long term goal of the City-mandated assessment process was to review CLI's viability and its capacity to address ongoing funding needs to maintain its properties. Over the past few years, CLI has built up reserves for these properties to cover ongoing maintenance and repair needs and has also started a replacement policy at turnover of units. Both 607 Notabene and Elbert Avenue Apartments are in sound shape and can continue to operate for a number of years with standard maintenance. The 607 Notabene property will be the next renovation for CLI to address in a few years. CLI will be continuing its program of upgrades for the remaining units at Elbert Avenue. CLI has continued to look for opportunities to leverage the resources it has to maintain and upgrade the Elbert Avenue property. With the nature of CLI's programs targeting very low income households, the constrained revenue stream that can be achieved at the Notabene Drive properties limits cash flow available for major repairs and renovations. CLI has developed partnerships with various community groups and businesses which over the years have provided volunteers to perform improvements and minor renovations at its properties and will continue this practice. For example, CLI has partnered with Rebuilding Together Alexandria (RTA) in the past to use that organization's volunteer labor and construction coordination services to renovate some apartments.

In keeping with its usual practice, Housing staff recommends that the \$300,000 in gap financing be provided in a low-interest (2% interest) loan to CLI, with payments to begin on a residual receipts basis, with repayments beginning in the fall of 2014, after three of CLI's current City loans are repaid. The new loan which will total \$325,000 (predevelopment and construction loan amounts) will have a 40 year term, with interest accruing until payments begin. CLI's monthly debt service obligation to the City is estimated at \$1,000.

Since the City HOF monies identified for this project are federal HOME monies, it is noted that CLI will need to comply with federal regulations including a 15-year affordability restriction, rent and occupancy requirements, tenant income eligibility requirements, and property standards inspections. The HOME program requires that 8 units be designated as High HOME units and 2 units be designated as Low HOME units for the duration of the 15-year affordability period.³ The High HOME units will be capped at the 60% LIHTC levels.

FISCAL IMPACT: \$300,000 in HOME monies will be paid out of the Housing Opportunities Fund. Payments are projected to beginning in FY 2015. The previously allocated \$25,000 predevelopment loan will be included in the permanent financing loan.

³ High HOME units must be initially occupied by households whose annual gross income does not exceed 80% AMI adjusted locally and rents are restricted to the HUD published High HOME rents. Low HOME units must be occupied by households whose annual gross income does not exceed 50% AMI adjusted locally and rents are restricted to the HUD published Low HOME rents.

STAFF:

Helen S. McIlvaine, Deputy Director

Eric Keeler, Division Chief for Program Administration

ATTACHMENT:

Letter and Portions of the Housing Opportunities Fund Loan Application from Community Lodgings, Incorporated



Community Lodgings, Inc.

"Opening Doors To Independence Since 1987"

Ms. Mildrilyn Davis
Director of Housing
City of Alexandria
301 King Street Room 110
Alexandria, VA 22314

May 8, 2012

Dear Mildrilyn,

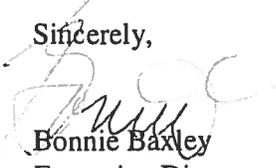
On behalf of Community Lodgings, our Board of Directors, our staff and the families I am requesting a \$300,000 loan from the City of Alexandria's HOME funds. This loan request is to underwrite the costs of renovating our building at 612 Notabene Drive. We have engaged an architect for preliminary plans and estimate that the total renovation would not exceed the amount requested. I have attached a preliminary scope of services to inform you of the current status of our building.

The current residents include two tenants who are paying market 'affordable' rate rents and eight transitional housing families who pay no rent, but a program subsidy equal to 30% of their monthly income.

We would like to begin the project by the end of September, as we have deferred some needed repairs on the building pending the renovation. This target date is, of course, dependent on whether the City funds would be available and secured by then.

Please advise us, as soon as possible, if there is any foreseeable problem with this request or the projected time line. We look forward to working with you on this project. As always, we are grateful for your assistance. Please advise me of any other information you may need.

Sincerely,


Bonnie Baxley
Executive Director

Featured in the 2007-08 Catalogue for Philanthropy: "One of the best small charities in the Greater Washington region"
3912 Elbert Ave., # 108 · Alexandria, VA 22305 · T: 703-549-4407 · F: 703-548-1294 · CFC No.: 22650 · United Way No.: 8358 · Tax ID No.: 54-1428495

www.communitylodgings.org



Community Lodgings, Inc.

"Opening Doors To Independence Since 1987"

Ms. Mildrilyn Davis
Director of Housing
City of Alexandria
301 King Street Room 110
Alexandria, VA 22314

June 13, 2011

Dear Mildrilyn,

On behalf of Community Lodgings, our Board of Directors, our staff and the families I am requesting a \$500,000 loan from the City of Alexandria's HOME funds. This loan request is to underwrite the costs of renovating our building at 612 Notabene Drive. We have engaged an architect for preliminary plans and estimate that the total renovation would not exceed the amount requested. I have attached a preliminary scope of services to inform you of the current status of our building.

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ATTACHMENT A
PROJECT NARRATIVE INSTRUCTIONS AND OUTLINE

It is in the applicant's best interest to fully address each category and to provide all documents out lined in the checklist at the time of submission. Questions or concerns about the narrative may be directed to Helen McIlvaine, Deputy Director, Office of Housing, City of Alexandria, Suite 200, 421 King Street, Alexandria, Virginia, 22314, 703-828-4990, or helen.mcilvaine@alexandriava.gov.

1. Organizational structure and capacity

History, mission and goals: Our mission is to 'lift families from homelessness and instability to independence and self-sufficiency'. Community Lodgings (CLI) started in 1987 as Carpenter's Lodgings to provide affordable housing and transitional housing for Alexandria's homeless. In 1998, the Fifer Family Learning Center was opened to offer adults computer literacy and English as a second language (ESL) classes, educating them into better jobs. In 2002, neighborhood needs dictated that full-family services be provided; thus our year-round Youth Education Program, which includes a parenting component, was established for neighborhood children. Community Lodgings' programs now touch over 350 lives a week. With trusted bilingual staff, and growing programs and services to provide guidance, training, and support for clients, Community Lodgings has become the neighborhood's main resource for self-help and life improvement

2. Project Description

In winter of 2010-11, it became apparent that our 10 unit apartment building was rapidly becoming inhabitable. The heat was not reaching the upper floors; there was moisture and leakage in the system which resulted in mold and mildew growth. The repair calls have been more on that building compared to our other buildings then all 4 of our other buildings combined.

As a result, the decision was made to embark on a rehabilitation plan. The Board of Directors organized a committee to proceed with the plan. Preliminary Scope of Service assessments on the property were done by two architects as a pro bono service to Community Lodgings. Subsequently, requests for proposals were solicited from local architects and the committee chose, from among 4 proposals, architect John Savage of Savage & Associates, PC for the project. John agreed to do the Design Phase of the project pro bono, on the condition that the project goes forward and the remaining part of his services is paid in full. So the design phase ensued and we proceeded to the Construction Document Phase and the Design Phase was pro bono.

Initially, in a response to the Ten Year Plan to End Homelessness' citing a need for efficiencies, we planned to renovate the building into a combination of single unit efficiencies and one and two bedroom apartments. However, the zoning for the area prohibited that because it would result in 'more units'; although the capacity/occupancy would have been the same. So we

compromised and created a plan with 6 two bedroom and 4 one bedroom units. This maintained the 10 unit building.

The design calls for extreme energy measures:

- 1.) Energy Star windows are being specified that meet required egress.
- 2.) New roofing insulation is being installed that meets the R-49 standards. This is a considerable upgrade from what you have now based upon a field visit to the attic on 2/8/12.
- 3.) The exterior walls, with the exception of the bathrooms, are being framed out and insulated with R-15 insulation.
- 4.) The mini-splits that CLI has always wanted are being incorporated into the project. These units are very energy efficient.
- 5.) Energy Star appliances will be specified after approval from CLI.

3. Project location and site control

The project is located in the buildings located at 612 Notabene Drive , Alexandria, Va 22305. There are 10 apartments located in this buildings all of which are required to contain affordable housing families. The area is zoned for housing for which these buildings are used.

There are no development challenges related to the site.

Community Lodgings has control of the site in terms of being owner of the building.

The project has not been discussed with the neighbors, as it will not affect them in any way.

Indicate the number of units and unit sizes to be provided, and the proposed sales prices or monthly rents. 6 – two bedroom units and 4 –one bedroom units will be the renovated project. These units will be used for our transitional housing program, housing the homeless families who pay 30% of their incomes for a program fee and we subsidize the rent for them. If there is no homeless family placed into the unit, then we rent it at affordable rates based on HUD guidelines. The total rent revenue for these units per month, if rented as ‘affordable’ would be: \$12080.00/month.

Describe whether the site is appropriately zoned for the proposed use, and whether any zoning variances or waivers (e.g. height, density, parking, open space, etc.) are likely to be required. Please note that this may require consultation with the Department of Planning and Zoning.

Both the Executive Director and Architect have investigated the potential for zoning concerns and there are none.

Project Target Population

Community Lodgings serves the City of Alexandria’s homeless families, moving them from the City’s homeless shelters into our Transitional Housing Program (THP). In 2011, the THP received applications from 128 of the City’s homeless seeking placement into our transitional

housing program. Of those applying, 50 were adults and 78 were children. We were able to meet 25% of the need for those applying for our services; 32 homeless people, 13 adults and 19 children, entered the program. During the year, 3 of the apartments at 612 Notabene Drive were eliminated from the transitional housing program because they were in such bad condition. We did 'band aid' them enough to place affordable families in for the short term until the building is renovated.

These 128 referrals were from the following Alexandria agencies:

Alexandria City Domestic Violence Program , Carpenter's Shelter
Alexandria Works, DHS/Virginia Cares Program Alexandria DCHS/Child Welfare,
Alexandria Community Shelter, Alive House, OCS

During the FY 2011, 37 homeless people were dismissed from the program and of those 37, 34 transitioned into *total* independence living without rental subsidies. **This is a 91.8% success rate.**

In addition we house 128 lower income people in our, 28 affordable units. These units are mandated to stay below market rate to house families below the 50% and 60% AMI for the city. Most, if not all, of our tenants are well below that level of income. Community Lodgings has low barriers; frequently taking tenants from the shelters or other city programs who would not be able to rent elsewhere.

In addition, the entire Arlandria neighborhood of Alexandria accesses the Community Lodgings' Learning Center Programs. The Learning Center is within walking distance of over 350 disadvantaged families and individuals who are in dire need of our services. In a June 2008 Alexandria City assessment of human service needs, Arlandria was identified as the area in greatest need. It is also **first in the city** in: sexual assaults, homicides, and unemployment and **number one in Virginia** for: poverty rate, severe overcrowding and violent crime. Community Lodgings' target population consists of the Arlandrian disadvantaged families and individuals who are homeless, low income, and many are immigrant Latinos. The economic status of these people is depressed, designated as extremely low income by Virginia Housing Development Authority standards; more than 60% are in the labor force, and most live in subsidized housing

Most adult clients are English as a second language, have less than a 5th grade education, and 35% are illiterate in their native Spanish. Adult effort is spent sustaining a living and the consistent and readily available support of Community Lodgings' programs and staff, is key in helping these families improve their life prospects to escape poverty and build a stronger future for their children. Education and language barriers are a characteristic of most Arlandria families. This directly inhibits them from helping their children with, and taking an active role in, their schooling. Adult ESL classes will enroll over 70 adults. all community residents to visit our Transitional Housing caseworker for any problems/needs they may have. In the span of a month, we assisted over 22 walk-in clients with the following individual needs: 36% food assistance, 27% counseling, 27% clothing, 9% furniture, and 55% rental assistance.

4. Project Budget

Attached are construction costs estimates provided by Pulte Homes who in partnership with HomeAid will be the 'builder captain' for the project. In addition to their costs estimates is the

fee for the architecture design. Although we will be losing revenue from the rental on some of the units we accounted for that in our operating budget.

EXPENSES

Construction costs	\$777,368 (see attached)
Insurance costs	7,774
Architect fee	39,637 (see attached)
<u>HomeAid fee</u>	<u>13,600</u>
Total costs:	\$841,779

7. Project Schedule

Proposed project schedule: The project is scheduled to ensue from September 2012 through December 2012. Current tenants were originally placed into these apartments with full knowledge that the renovation was eminent and allowed occupancy only on a month to month lease. On May 4, 2012 they were given notice that as of September 1, 2012, they must vacate the apartment. This was done in accordance with the direction of City of Alexandria, Office of Housing, Division Chief, Melodie Seau.

Predevelopment- done

Site control- we own the building

Zoning approval- construction plans fall within the zoning ordinances

Financing and construction milestones-all is in place

8. Evidence of Financing Commitment All anticipated funding and financing sources should be listed, with a statement regarding the level of commitment at the time of submission of the application. Progress made in obtaining project funding commitments should be regularly reported to the Office of Housing so that the application can be updated.

HomeAid of Northern Virginia and Pulte Homes:	\$272,079 (committed, see attached)
City of Alexandria	25,000 (received-predevelopment costs)
BB&T Bank Loan	\$240,000 (committed, see attached)*
City of Alexandria	\$300,000 (applying herewith)

NOTE: Community Lodgings also has \$40,000 in cash reserves and \$51,000 in property reserves that is available in case of a cost overrun or the occurrence of emerging situations.

DEBT SERVICE: The cost of the carrying the BB&T debt is currently \$1,002/month. If that is converted into a longer term loan, the projected payments would be \$4,649/month that is a 6% for a five year term. However, Community Lodgings does not anticipate the need for the longer term. We have a partnership with Freddie Mac Foundation and will be soliciting a \$240,000 grant to eliminate the need for the conversion.

Cash flow on the property if rented to affordable tenants would be \$12,080.00/month.

9. Development Experience

Community Lodgings has completed many successful development projects over the 25 years of existence. The City has partnered with us in helping to finance some of these projects as well as HomeAid, the State of Virginia and private banks. All have come to fruition successfully and any loans used have been repaid as required.

10. Project Development Team

Project architect: John Savage of Savage & Associates, LLC (contract attached)
Structural and geotechnical engineers: META Engineers, P.C.
The general contractor, Pulte Homes/HomeAid of Northern Virginia
Lenders: BB& T Bank

The Board of Directors and the Executive Director of Community Lodgings have ultimate oversight of the project. A subcommittee of 5 has been organized to oversee the project:

Barry Roman- Institutional memory, development, former board chair

Occupation: President, Reliant Asset Management

Barry Stauffer- He knows Community Lodgings properties. He's rebuilt two Katrina homes in New Orleans, organized and worked on numerous Habitat houses and since 2008 has been occupied nearly full time helping Community Lodgings. The value of his work is incalculable. He's led groups who have logged over 1800 volunteer labor hours, saving CLI an estimated \$50,000 that can be devoted to our programs. Barry has earned the thanks of so many homeless families who are enjoying bright new homes and the numberless students and families who will use the new Learning Center wing to study and build a better life.

Helen Lewis- Former director, board chair, grant writer, event organizer and institutional memory

Occupation: Housing Consultant; Retired Grant writer-spearheaded the original renovation of the properties in 1995.

Bonnie Baxley- Executive Director-oversees the entire organization and the ongoing maintenance of the properties.

John Savage, project architect, has been retained to monitor the construction on an ongoing basis

Submission Process The loan application, including the project narrative and pro formas, (and including the VHDA application, if appropriate) should be submitted electronically to the Office of Housing. Electronic submissions should be directed to helen.mcilvaine@alexandriava.gov and patrick.beckley@alexandriava.gov.

In addition, a hard copy of the entire application and all attachments detailed in the checklist below should be delivered to the Office of Housing. Complete packets should be directed to the attention of Helen McIlvaine, Deputy Director, Office of Housing, 421 King Street, Alexandria, Virginia 22314.

Project Budget

HomeAid of Northern Virginia and Pulte Homes:	\$272,079 (committed, see attached)
City of Alexandria	25,000 (received-predevelopment costs)
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<u>City of Alexandria</u>	<u>\$300,000 (applying herewith)</u>
Total Income	\$847,079

EXPENSES

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Total costs:	\$841,779

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Cash flow on the property if rented to affordable tenants would be \$12,080.00/month.

PROJECT BUDGET
HomeAid Project: 612 Notabene Dr.,
Alexandria,VA

'23/2012

<u>Activity</u>	<u>Vendor</u>	<u>Retail Budget</u>	
Demolition	The Basics	\$112,000	Estimate based off of 4 weeks of demo
Concrete	Potomac Concrete	\$7,079	
Brick	K&M Masonry	\$7,920	
Brick Flashing	K&M Masonry	\$10,860	
Rough Lumber	Annandale Millworks	\$3,000	
Rough Carpentry	VCI	\$8,000	
Roofing	Loudoun Valley Roofing	\$15,611	
Exterior Trim / Gutters	Dae Won Construction	\$6,895	
Exterior Doors	Annandale Millworks	\$15,000	Estimate
Windows	Quality Window and Door	\$30,000	Estimate
Stair Rail	R&F Metals	\$3,820	
Plumbing	Peed Plumbing	\$58,890	
HVAC	Southern MD HVAC	\$74,220	
Electric	Spartan Electric	\$70,000	Estimate
Electric Fixtures	Commonwealth Lighting	\$8,201	
Insulation	G&B Insulation	\$2,170	
Drywall	HDS Drywalll	\$24,960	
Paint Exterior	Kenna Company	\$7,695	
Paint Interior	Kenna Company	\$12,650	
Hardwood Floor	Advanced Flooring & Design	\$29,520	Hardwood in BR's and LR's
Ceramic Tile	TAC Ceramic Tile	\$15,884	Tile in Kitchens and Baths
Cabinets	Suburban Kitchens	\$16,000	Pending Final Cabinet Selection
Countertops	Suburban Kitchens	\$5,200	Laminate Countertops; granite add \$15,600
Interior Doors and Trim	Annandale Millworks	\$45,133	
Hardware	Heritage Contracting	\$4,250	
Appliances	Whirlpool	\$15,795	Whirlpool Black
Construction Cleaning	TBD	\$4,000	Progress cleaning and final cleaning
Landscaping	Creative Landscapes	\$5,000	TBD Based on Final Design
Dumpsters	CSI	\$26,220	Estimate based on \$350/pull
Contingency		\$30,000	
GC Management Cost	Pulte Homes	\$101,395	15% Management Fee
	TOTAL	\$777,368	

DEVELOPMENT SCHEDULE

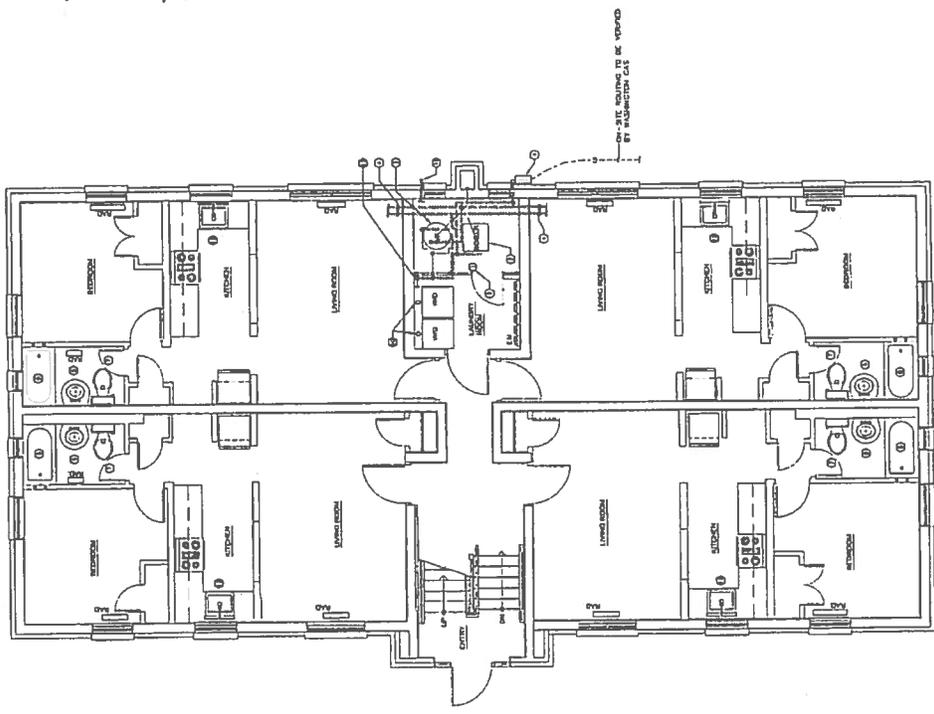
May: align financing and notify tenants who are on month to month leases that the lease will not be extended into September

August-September: help tenants move, as needed; put furniture owned by Community Lodgings into storage.

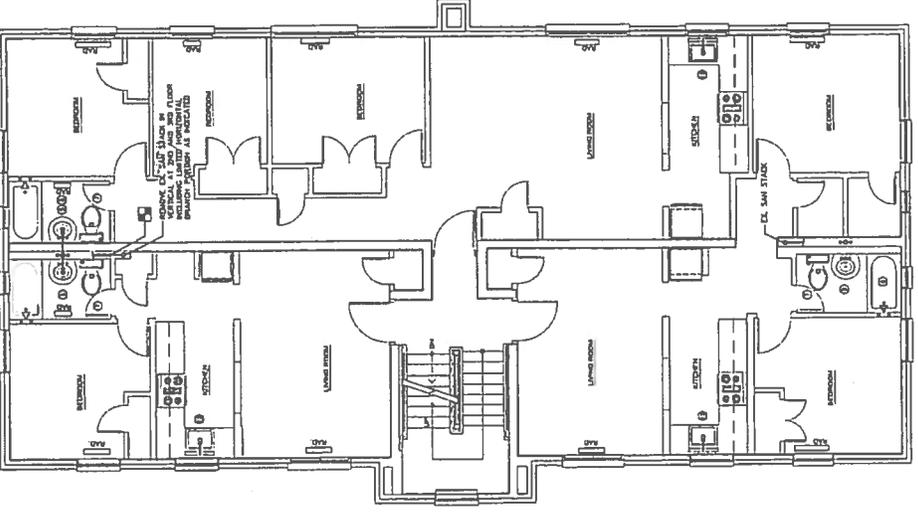
September-December: Rehabilitate property

December identify tenants/transitional clients to be scheduled to enter the apartments.

December-January move furniture into the apartments in which the homeless families will move.



1 LOWER LEVEL PLAN
SCALE 1/4" = 1'-0"



2 1ST & 2ND FLOOR PLAN
SCALE 1/4" = 1'-0"

NOTES:

1. REFER TO DRAWING P-8 FOR SYMBOLS AND ABBREVIATIONS.
2. REMOVE GAS METER FROM 2ND AND 1ST FLOORS. THE GAS METER SHALL BE REMOVED BY THE SUBCONTRACTOR.
3. REMOVE EL. GAS METER FROM 2ND AND 1ST FLOORS. THE GAS METER SHALL BE REMOVED BY THE SUBCONTRACTOR.
4. REMOVE EL. BRANCH AND RELATED WATER CONNECTIONS AND TUB.
5. REMOVE EL. DOMESTIC HW AND CP PIPING EXCEPT IN RESTROOMS AND ALL BRANCH CONNECTIONS TO ALL EL. FITTINGS THROUGHOUT BUILDING.
6. REMOVE EL. DOMESTIC HW AND CP PIPING EXCEPT IN RESTROOMS AND ALL BRANCH CONNECTIONS TO ALL EL. FITTINGS THROUGHOUT BUILDING.
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13. REMOVE EL. DOMESTIC HW AND CP PIPING EXCEPT IN RESTROOMS AND ALL BRANCH CONNECTIONS TO ALL EL. FITTINGS THROUGHOUT BUILDING.

TAGGED NOTES: ○

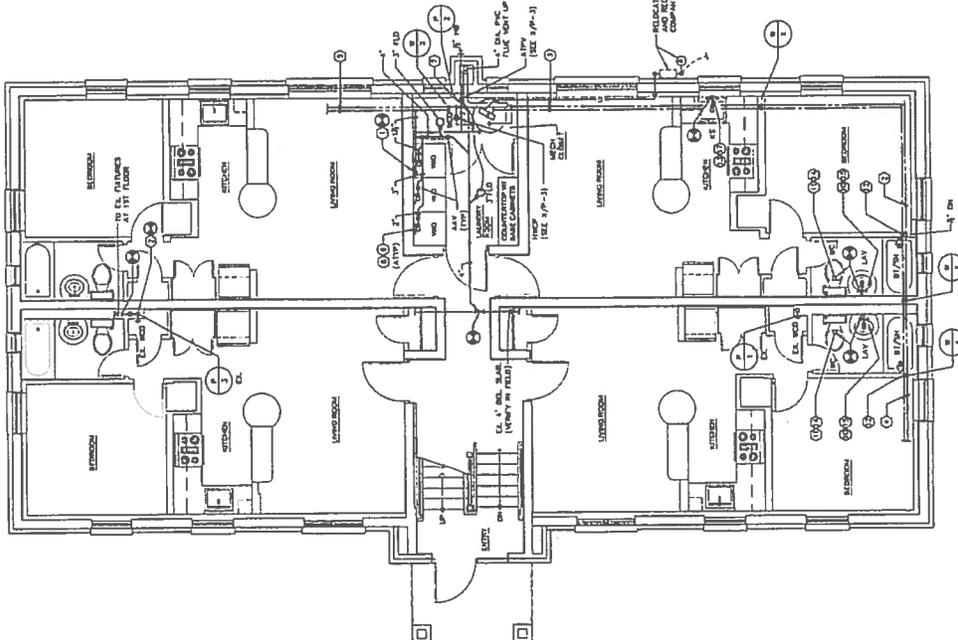
1. REMOVE EL. GAS METER FROM 2ND AND 1ST FLOORS. THE GAS METER SHALL BE REMOVED BY THE SUBCONTRACTOR.
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13. REMOVE EL. DOMESTIC HW AND CP PIPING EXCEPT IN RESTROOMS AND ALL BRANCH CONNECTIONS TO ALL EL. FITTINGS THROUGHOUT BUILDING.

<p>ALTERATIONS TO 612 NOTABENE DRIVE ALEXANDRIA, VIRGINIA</p> <p>META Project #11119-00</p>	<p>FLOOR PLANS - DEMOLITION PLUMBING</p>	<p>submittal/revisions: 07/3/12 ISSUED FOR DESIGN DEVELOPMENT</p>	<p>Savage & Assoc., P.C. 218 NORTH LEE STREET, SUITE 304-A ALEXANDRIA, VIRGINIA 22314 TEL: (703) 683-6410 FAX: (703) 684-8428</p>
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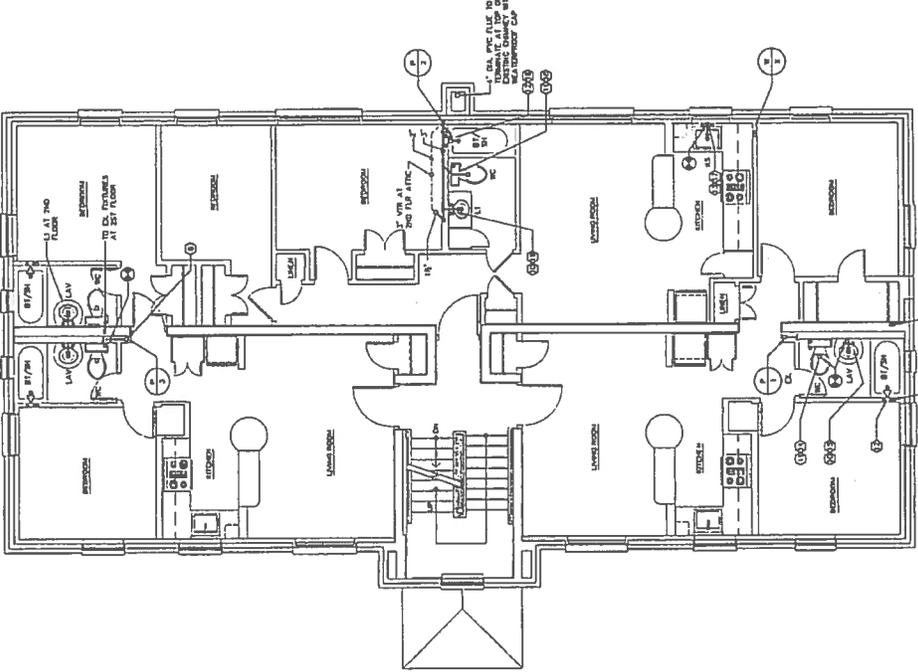
META ENGINEERS, P.C.
1000 COMMONWEALTH BLVD., SUITE 100
ALEXANDRIA, VA 22304
TEL: (703) 746-1100 FAX: (703) 746-1101
WWW.METAENGINEERS.COM

Drawing
P-1
Sheet 2 of 4
DATE
X/00/00

BY: [Signature] DATE: [Date]



1 LOWER LEVEL PLAN
SCALE: 1/4" = 1'-0"



2 1ST & 2ND FLOOR PLAN
SCALE: 1/4" = 1'-0"

NOTES:

1. REFER TO DRAWING P-8 FOR SYMBOLS AND ABBREVIATIONS.

TAGGED NOTES: ○

1. CONNECT NEW 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE AND CONTINUE AT EL. 1" TO 1/2" IN VERTICAL TO ALIGN WITH NEW STAIR LOCATION AT LEVELS 2 AND 3.
2. NEW DOMESTIC HW, CW AND GAS LINES ROUTED IN BALCONY.
3. NEW DOMESTIC HW AND CW LINES ROUTED IN BALCONY.
4. NEW DOMESTIC HW AND CW LINES ROUTED IN BALCONY.
5. CONNECT NEW STACK VENT TO EL. VTH IN 2ND FLOOR ATTIC SPACE.
6. PROVIDE 2" WELT STAIRWELL FOR CDS DRAIN.
7. PROVIDE 2" WELT AND CW CONNECTIONS TO EL. VTH WITH VALVES AT SHUT-OFF.
8. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
9. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
10. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
11. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
12. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
13. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
14. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
15. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
16. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
17. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.
18. 1/2" CW TO EL. 1" RISING SERVICE AS CE SHUT-OFF VALVE.

<p>SAVAGE & ASSOC., P.C. 218 NORTH LEE STREET, SUITE 204-A ALEXANDRIA, VIRGINIA 22314 Tel: (703) 683-6410 Fax: (703) 684-8428</p>	<p>FLOOR PLANS - NEW WORK PLUMBING</p>	<p>Submittals/Revisions: 07/13/12 ISSUED FOR DESIGN DEVELOPMENT</p>	<p>ALTERATIONS TO 612 NOTABENE DRIVE ALEXANDRIA, VIRGINIA</p> <p>META Project #11115-00</p>
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<p>drawing P-2 Date: 07/13/12 X/20/00</p>	<p>META ENGINEERS, P.C. 1001 EAST MAIN STREET, SUITE 200 ALEXANDRIA, VIRGINIA 22304 Tel: (703) 746-1100 Fax: (703) 746-1101</p>
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HomeAid
Northern Virginia

Executive Committee

President
Michael Scheurer
Virginia Housing Development
Authority

Vice President/President-Elect
Russ Rosenberger
Madison Homes, Inc.

Secretary
Sal Migliore
Augustine Homes

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Immediate Past President
John Monacci
Winchester Homes

Directors

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Stanley Martin Homes

William L. Berry
The Berry Companies

Lewis Birnbaum
Pulte Homes

Charles M. Browning

Patti Brownstein
Planet Cotton/LGP Promotions

David Cogley
Pulte Homes

John Darvish
John Darvish Construction

John DeZinno

Carson Lee Fifer, Jr.
McGuireWoods LLP

Stephen Fritz
Ryland Homes

David G. I.
McGuireWoods LLP

Katherine K. Hanley

Cecilia Hodges
M&T Bank

Fiona Hughes
Stanley Martin Homes

Dennis Kelleher
M/I Homes

Don Knutson
Beazer Homes

Patricia Leader
Watermark Group

Jewell Mikula
Shelter House, Inc.

Barry Schwartz
Schwartz Enterprises, Inc.

Doug Smith
Miller & Smith

Terri Stagi
Jack Morris Advertising, Inc.

Peter R. Thompson
K. Hovnanian Homes

May 7, 2012

Bonnie Baxley
Community Lodgings
607 Notabene Drive
Suite 1
Alexandria, VA 22305

Dear Bonnie:

HomeAid Northern Virginia is pleased to support Community Lodgings in its efforts to serve homeless families in Alexandria and throughout Northern Virginia. We hope that Community Lodgings is successful in acquiring the needed funding for proposed renovation of the apartment building, and that HomeAid will be an integral partner in this project.

With HomeAid's support, Community Lodgings can expect a projected 35% savings off the retail cost you would pay a general contractor for renovating the apartment building. We have shared the estimated budget with you from Builder Captain, Pulte Homes, and the savings projection at this point is \$272,079. It's our hope that through these savings you can redirect those funds into the services that will surely be needed by the new residents of the building.

HomeAid is a 501(c)3 non-profit organization originally organized in 2001 by the Northern Virginia Building Industry Association (NVBIA). Our mission is to build and renovate shelters and transitional housing for effective non-profits, such as Community Lodgings, and work with them to renovate existing facilities or construct new facilities that add additional shelter beds and services to the homeless.

HomeAid looks forward to partnering with Community Lodgings on the renovations for the transitional apartment building. Let's get to work!

Most sincerely,

Christy Eaton
Executive Director



**Community Lodgings, Inc.
Board of Directors**

OFFICERS

CHRISTOPHER McMURRAY, Chair
Community liaison, business contacts, fundraising
and PR
Occupation: Mediator and President of McMurray
Dispute Resolution
City/State: Alexandria, VA
Term: 2004-Present
Compensated: No
Voting Member: Yes

MARIE MUSCELLA, Treasurer
Branding, event planning
Occupation: Department Manager, Enterprise
Business Strategy
City/State: Alexandria, VA
Term: 2010-Present
Compensated: No
Voting Member: Yes

GEORGE TUTTLE, Secretary
Legal counsel for tenant, contract and other
routine issues
Occupation: Civil Attorney; Straub Law Offices
City/State: Alexandria, VA
Term: 1995-Present
Compensated: No
Voting Member: Yes

MEMBERS

ANN BRUNO
Program development
Occupation: Global Trade Manager, TBB Global
Logistics
City/State: Alexandria, VA
Term: 2010-present
Compensated: No
Voting Member: Yes

MARTY DEVINE
PR and fundraising support
Occupation: Nonprofit consultant, Freelance
journalist
City/State: Alexandria, VA
Term: 2004-Present
Compensated: No
Voting Member: Yes

VIRGINIA HAMMELL
Finance
Occupation: Retired as Director of Finance,
School of Business; George Washington
University
City/State: Alexandria, VA
Term: 2009-Present
Compensated: No
Voting Member: Yes

ANNE LAFOND
Community liaison, grant support
Occupation: Senior Evaluation Advisor/Director; JSI
Center for Health Information, Monitoring and Evaluation
City/State: Alexandria, VA
Term: 2009-Present
Compensated: No
Voting Member: Yes

HELEN LEWIS

Former director, board chair, grant writer, event organizer and institutional memory
Occupation: Housing Consultant; Retired Grantwriter
City/State: Alexandria, VA
Term: 1987-Present
Compensated: No
Voting Member: Yes

KRISTEN MOORE

Finance, event planning
Occupation: Senior Budget Analyst, George Washington University Budget Office
City/State: Alexandria, VA
Term: 2010-Present
Compensated: No
Voting Member: Yes

LUIS PANIAGUA

Consultant
Deloitte Consulting LLP
City/State: Arlington, VA 22204
Term: 2011-Present
Compensated: No
Voting Member: Yes

BARRY ROMAN

Institutional memory, development, former board chair
Occupation: President, Reliant Asset Management
Terms: 2011-Present
Compensated: No
Voting Members: Yes

FRANK ROSE

Financial guidance
Occupation: Vice President of Business Services and Commercial Lending; BB&T
City/State: Alexandria, VA
Term: 2009-Present
Compensated: No
Voting Member: Yes

CATHY STERLING

Fundraising and development
Occupation: Vice President; Schultz & Williams
City/State: McLean, VA
Term: 2010-Present
Compensated: No
Voting Member: Yes

STEVE

WALLACE

Legal counsel on property investment and tax shelters
Occupation: Affordable Housing Attorney; Nixon Peabody, LLP
City/State: Alexandria, VA
Term: 2006-Present
Compensated: No
Voting Member: Yes

ANGELA WELSH

Community outreach, public relations
Occupation: Development Consultant
City/State: Alexandria, VA
Term: 2006- Present
Compensated: No
Voting Member: Yes

3a

City of Alexandria, Virginia

MEMORANDUM

DATE: MARCH 1, 2012
TO: AFFORDABLE HOUSING ADVISORY COMMITTEE
FROM: MILDRILYN STEPHENS DAVIS, DIRECTOR, OFFICE OF HOUSING *msd*
SUBJECT: CONSIDERATION OF AN AFFORDABLE HOUSING PLAN FOR BRADDOCK METRO PLACE

ISSUE:

Consideration of the Affordable Housing Plan for Braddock Metro Place (Attached).

RECOMMENDATION:

That the Affordable Housing Advisory Committee approve the Affordable Housing Plan submitted by the Braddock Metro Place Applicant.

BACKGROUND:

The proposed site in question is located at 1261 Madison Street (See Attached Map). The developer has proposed two options to be considered by the Planning Commission and City Council. Option A is a 10 story building consisting of 165 dwelling units while Option B is an eight story apartment building consisting of 141 dwelling units. The current vacant site is zoned CRMU – H and will allow up to a 2.5 FAR through the Development Special Use Permit (DSUP) process.

DISCUSSION:

While the current zoning of this site will allow the density needed to construct the building proposed under option A, the proposed height of the building exceeds what is allowed under the Braddock Metro Small Area Plan. The applicant has requested the use Section 7-700 of the City's zoning code for Option A of this project in order to increase the maximum height of the building from 77 feet to 99 feet. The increased height allowed by the use of Section 7-700 will result in approximately 30,562 gross square feet of additional development all of which is within the allowable density under to current zoning. The applicant has submitted an affordable housing plan that will provide ten (10) affordable set-aside rental units within the project, the bonus height allowed by Section 7-700 accounts for eight (8) of the set aside units while an additional two (2) units would be provided in lieu of the voluntary cash contribution. The

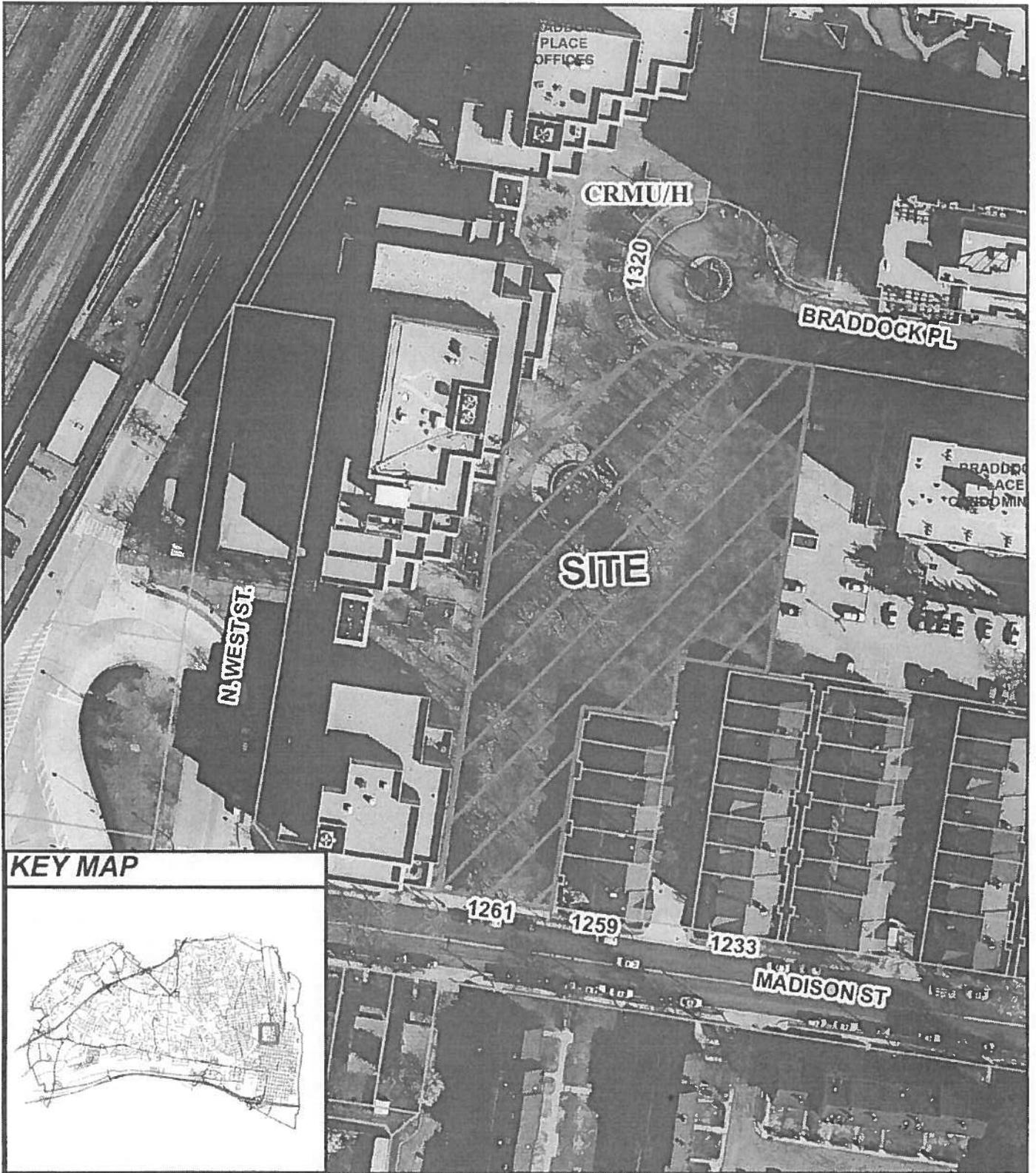
applicant's affordable housing plan consists' of one efficiency, five one-bedroom, and four two-bedroom units that will have affordable rents for a period of 30 years. The rents for the set-aside units will be the lesser of the rents allowed under the federal Low Income Housing Tax Credit (LIHTC) program for households at or below 60% of the Washington DC Metropolitan Area Family Median Income or the maximum rents established for Section 8 and Housing Voucher Programs.

The affordable housing distribution analysis that was completed as part of the Housing Master Plan showed limited affordable rental opportunities in the Braddock Metro Plan Area outside of Resolution 830 units. This project would create set-aside affordable rental units that would be affordable to individuals and families that do not have the income to afford market rate units in this neighborhood, but are of a higher income than those typically served by Resolution 830 units. This project demonstrates how compliance by a developer with the bonus height provision of Section 7-700 of the City's Zoning Ordinance can be an effective tool to provide affordable housing opportunities for low and moderate income households (including City workers, seniors, and individuals with disabilities) within a mixed-income model.

The recommended conditions of affordable housing plan are as follows:

1. The developer shall provide 10 affordable set-aside rental units consisting of one efficiency apartment, five one-bedroom units and four two-bedroom units.
2. Rents payable for the set-aside units shall not exceed the lesser of the maximum rents (taking into account utility allowances) allowed under the federal Low Income Housing Tax Credit (LIHTC) program for households at or below 60% of the Washington DC Metropolitan Area Family Median Income or the maximum rents established for Section 8 and Housing Voucher Programs. Rents shall remain at the established affordable rates for a period of 30 years from the date of initial occupancy of each affordable unit. The owner shall re-certify the incomes of such households annually.
3. Once an income-eligible household moves into a unit, that unit will be considered an affordable unit until the household's income increases to more than 140% of the then-current income limit. At that time, the over income household shall be allowed to remain, but the next available unit of comparable size (i.e., with the same number of bedrooms, den space and/or approximate square footage) must be made available to a qualified household. Once the comparable unit is rented, the rent of the over-income unit may then be increased to market rate in accordance with any lease restrictions.
4. Applicants receiving Housing Choice Voucher (Section 8) assistance will not be denied admission on the basis of receiving Section 8. Section 8 payments will be treated as income for the purpose of determining minimum income eligibility.
5. The set-aside units shall be of the same size, floor plan and with the same amenities as other similar units in the development. Concentrations of affordable units will be avoided.

6. If the market rents are less than anticipated, the affordable rents as defined above (as adjusted for allowances) will continue to be used as the affordable rents; however, in the event the differential between the market rents and the affordable rents falls below \$150, the affordable rents shall be reduced to maintain a differential of at least \$150 at all times.
7. The developer shall provide the City with access to the necessary records and information to enable annual monitoring of compliance with the above conditions for the 30-year affordability period.
8. Occupants of the affordable rental units shall be charged a parking fee equivalent to no more than any commonly applied management fee for one parking space per unit. Normal charges shall apply with regard to any additional parking spaces rented by such occupant.
9. Amendments to the approved Affordable Housing Plan must be submitted to the Affordable Housing Advisory Committee for consideration, and require final approval from the City Manager.



KEY MAP



DSUP #2011-0024

4/3/2012



Braddock Metro Place
DSUP #2011-0024
Affordable Housing Plan
Dated February 24, 2012

As part of their application under DSUP # 2011-0024, for the 1261 Madison Street site, the Applicant is submitting two options for consideration: Option A requests a height bonus under § 7-700 of the Zoning Ordinance, and includes 165 residential rental units, in a building with an FAR of 2.5. Option B does not request a height bonus and includes 141 residential rental units, in a building with an FAR of approximately 2.27.

I. Option A: Bonus Height under Section 7-700

Under **Option A**, the Applicant proposes the following affordable housing plan: under DSUP # 2011-0024, to provide 10 on-site set aside units in lieu of making a voluntary payment to the affordable housing trust fund in accordance with the conclusions of the Report of the Development Housing Contribution Policy Work Group accepted by the City Council on June 8, 2005. The applicant has requested height bonus density for the provision of Affordable Housing pursuant to section 7-700 of the Alexandria Zoning Ordinance and therefore proposes these units under that provision. The plan outlined below addresses this proposal:

Monetary Contribution:

The residential project is planned to be rental rather than condominium. Therefore, the base density (Tier 1) contribution would be \$1.50 per square foot and the SUP density (Tier 2) contribution would be \$4.00 per square foot.

The underlying zone for the project is CRMU-H with a maximum FAR of 1.25 without a development special use permit and 2.5 with a development special use permit. The total existing site area of this site is 48,642 sq.ft. Therefore, the base density of 1.25 FAR is half of the total square footage of the project, or 60,803 sq. ft.. The additional density up to 2.5 FAR is an additional 88,503sq. ft. for a total square footage of 149,306 gross sq. ft.

An additional way to view the square footage in the building is as follows: the square footage achieved within the existing height limit is 118,744 sq. ft. in the floors up to 77' and the square footage within the height bonus is 30,562 square feet.

Use	Fee	Calculation Gross	Total Gross
Residential Base Density (Tier 1)	\$1.50	60,803 x \$1.50	\$91,204
Residential SUP Density up to 77 feet (Tier 2)	\$4.00	57,942 x \$4.00	\$231,766
Total:			\$322,970
Bonus Height (Tier 3)	33% of Bonus as Affordable 1 partial story of 4,033 and 2 full stories of 13,419 and 13,110 sq. ft.	30,562 x .33 = 10,187 gross sq. ft or 8,354 net sq.ft.	

Bonus Height:

The applicant is also requesting bonus height, not bonus density, in exchange for the provision of affordable housing. The applicant requests the following bonus height: from 77 feet to 99 feet for a portion of the building thereby increasing building from 141 units to 165 units:

In exchange for this bonus height, the applicant proposes the following:

Affordable Units:

In exchange for the bonus height, the applicant will contribute **ten (10)** affordable housing units on site (one studio, five 1 bedroom and four 2 bedroom). (Eight for the bonus height, 2 in lieu of the cash contribution for a total of 10 on-site units, approximately 6% of the total units in the project under Option A.

The applicant commits to the following restrictions on these units:

Target Population: 60% of median income in accordance with the Virginia Low Income Housing Tax Credit program

Affordability Period: 30 year affordability period consistent with the Virginia Low Income Housing Tax Credit program.

Maximum Rents: (in accordance with the Low Income Housing Tax Credit program as of 12/11)

Efficiency	One Bedroom	Two Bedroom
\$1,129.00	\$1,209.00	\$1,452.00

I. Option B: No bonus height

Under **Option B**, the Applicant proposes only to make a voluntary payment to the affordable housing trust fund in accordance with the conclusions of the Report of the Development Housing Contribution Policy Work Group accepted by the City Council on June 8, 2005. The plan outlined below addresses the voluntary monetary contribution for the proposed density:

The residential project is planned to be rental rather than condominium. Therefore, the base density (Tier 1) contribution is \$1.50 per square foot and the SUP density (Tier 2) contribution is \$4.00 per square foot.

The underlying zone for the project is CRMU-H with a maximum FAR of 1.25 without a development special use permit and 2.5 with a development special use permit. The total existing site area of this site is 48,642 sq.ft. Therefore, the base density of 1.25 FAR is 60,803 sq. ft. net. The additional density to 2.27 FAR is an additional 71,230 sq.ft. for a total square footage of 132,033 sq. ft.

Use	Fee	Calculation	Total
Residential Base Density (Tier 1)	\$1.50	60,803 x \$1.50	\$91,204
Residential SUP Density (Tier 2)	\$4.00	71,230 x \$4.00	\$284,920
Total:			\$376,124

AFFORDABLE HOUSING ADVISORY COMMITTEE

**Minutes of the Meeting: February 2, 2012
Room 2000, 301 King Street, Alexandria 22314**

Members Present

Michael Caison, Chair Rick Liu
Michael Butler Carter Fleming
Katharine Dixon Patrick McCreesh
Laura Lantzy Michelle Saylor
Bill Harris

Staff Present

Helen McIlvaine
Eric Keeler
Jon Frederick
Mark Jinks
Jeff Farner

Guests

Jack Sullivan Kara Bowyer
Hector Pinada Kelly Merrill
Milagos Navoro
Vernoncia Calzado
Peter Tucker
James Nozar
Poul Hertel
Esteban Garces

The meeting was called to order by Michael Caison, 7:00pm.

1. Minutes were passed and approved from the December 1, 2011 Meeting
2. There was an extensive presentation of the Beauregard Small Area Plan made by staff, including Helen McIlvaine, Jeff Farner, Deputy Director of Planning, and Mark Jinks, Assistant City Manager, also provided comments. Many of the slides and much of the information can be found on the city web site: <http://alexandriava.gov/BeauregardPlan> Also, of important note is there will be a town hall sponsored by the Affordable Housing Advisory Committee on February 23, 2012 at 7 pm to discuss exclusively the housing part of the plan.
3. Please see the staff report for funding of the of Rebuilding Together Alexandria's funding request. The staff recommendation was for approval of \$35,000.00, and Rebuilding Together requested \$50,000.00. After discussion, Ms. Lantzy made a recommendation to approve the full \$50,000 requested by RTA. Motion was seconded and approved with a vote of 4 Yea and 3 Nay, and 2 abstentions.
4. The support letter for the Aging plan was passed around for the information of the Committee.
5. Update, 16 replacement units as part of the ARHA redevelopment of James Bland have been purchased and within budget.
6. All financial reports from Housing Trust Fund, Housing Opportunities Fund, and Homeownership Program Reports were self explanatory.
7. At the conclusion of the meeting there was a public comment period and five members of the community had comments as they related to the Beauregard plan. Community members expressed concerns pertaining to insufficient amounts of affordable housing in the plan and the incomes limits did not represent the current community. Esteban Garces from Tenants and Workers United recommended a survey be completed of existing residents prior to moving forward with the plan and a proposal was presented to the Committee.

The meeting adjourned at 8:45pm.

Minutes prepared by Michael Caison

#3c

City of Alexandria, Virginia

MEMORANDUM

DATE: MAY 1, 2012
TO: AFFORDABLE HOUSING ADVISORY COMMITTEE
FROM: MILDRILYN STEPHENS DAVIS, DIRECTOR, OFFICE OF HOUSING *mail*
SUBJECT: CONSIDERATION OF AN AFFORDABLE HOUSING PLAN FOR THE DELANY

ISSUE:

Consideration of the Affordable Housing Plan for The Delany (Attached).

RECOMMENDATION:

That the Affordable Housing Advisory Committee approve the Affordable Housing Plan submitted by the Delany Applicant.

BACKGROUND:

The proposed site is located at 100 South Pickett Street directly west of Cameron Station (See Attached Map). The developer proposes to construct a mixed use development containing 189 dwelling units and 8,944 sq. ft. of non-residential space. The site is currently zoned CG which allows a maximum .75 FAR and will require both a rezoning and a Master Plan Map amendment to be built as proposed.

DISCUSSION:

The proposed project requires both additional density and height to be constructed. Section 7-700 of the City's zoning code allows a developer to obtain additional density and/or height in exchange for dedicated affordable housing units within the project. However, this zoning provision allows a density increase of no more than 20% and the additional density required for this project exceeds this limit. Section 7-700 also allows an applicant to receive additional height in exchange for affordable housing when the underlying zoning already allows height limits in addition to 50 feet which is not the case for this particular site. Therefore, the use of Section 7-700 was not an option for this particular development and the applicant will seek both a rezoning to allow additional density and a Master Plan Map amendment to allow additional height.

In exchange for the rezoning and in lieu of a monetary contribution to the City's Housing Trust Fund, the applicant has submitted an affordable housing plan that proposes to proffer twenty-three (23) housing units that would be affordable to households at or below 60% of the area median income. Table 1 estimates the value of the applicant's proposed affordable housing plan, while Table 2 shows the monetary calculation that would result if the applicant simply followed City's voluntary contribution guidelines. Staff estimates that the value of the applicant's proposed Affordable Housing Plan exceeds the voluntary monetary contribution by approximately \$2.6 million. Staff believes this additional value provides a significant community benefit in exchange for the additional density required by the applicant.

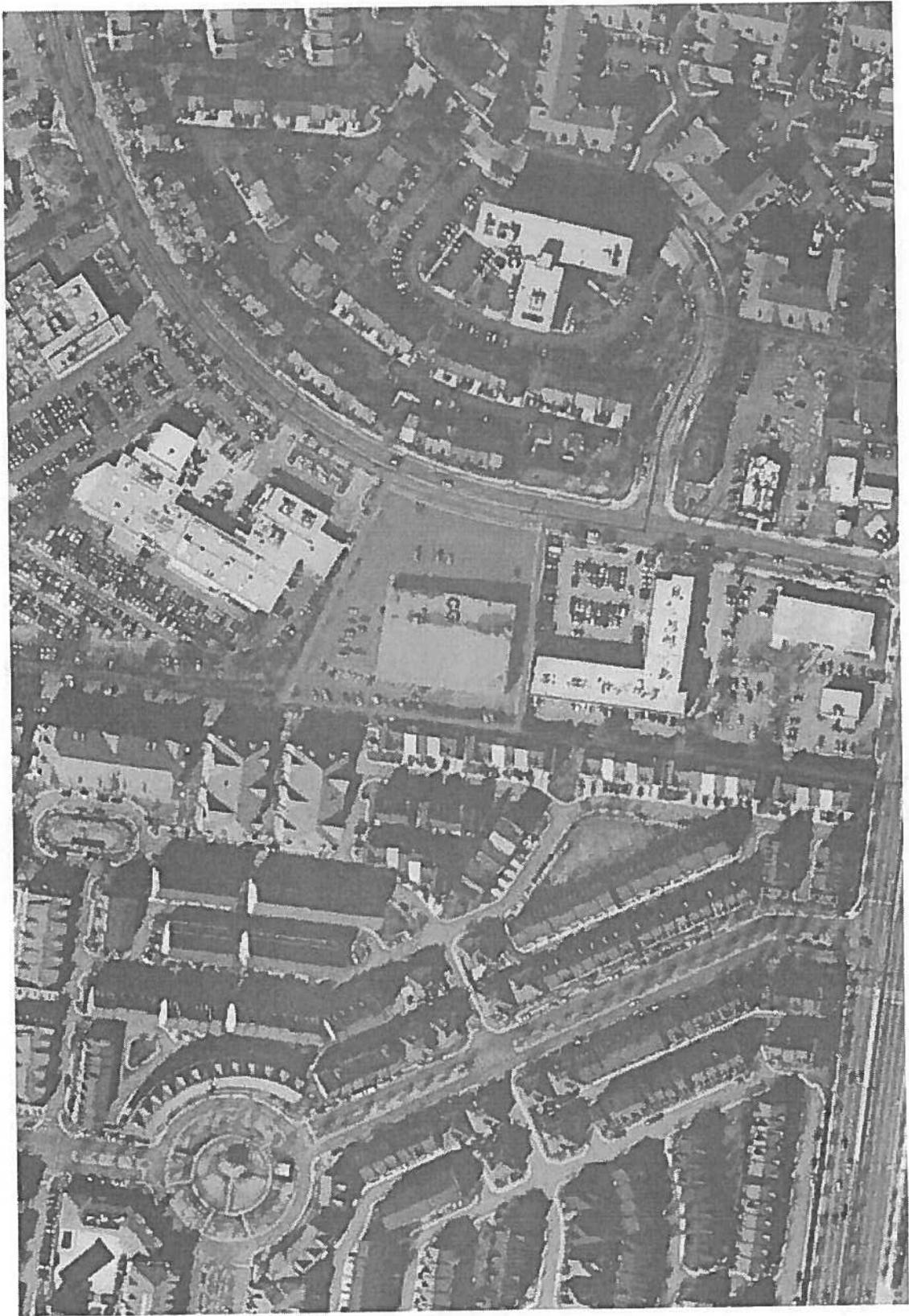
Table 1: The Delany Affordable Housing Plan Value						Cap Rate	6.00%
Unit Type	Number of Units	Market Rent	Affordable Rent	Monthly Difference	Yearly Difference	Total Loss	Value
1BR	15	\$1,800	\$1,209	\$591	\$7,092	\$106,380	\$1,773,000
2BR	8	\$2,350	\$1,452	\$898	\$10,776	\$86,208	\$1,436,800
Total Value							\$3,209,800

Table 2: Monetary Contribution based on City's Voluntary Contribution Guidelines			
Development Type	Sq. Ft	\$/Sq. Ft.	Contribution
Non-Residential	8,994	\$1.50	\$13,491
Tier 1 Residential	67,019	\$1.50	\$100,529
Tier 2 Residential	119,516	\$4.00	\$478,083
Total:	195,529		\$592,083

Another issue that must be weighed by staff is the tradeoff between hard units on the ground and monetary contributions that allow the City to run other affordable housing programs, including affordable rental housing preservation. This site is located within the Landmark/Van Dorn Small Area Plan and the within close proximity to the Landmark/Van Dorn Corridor Plan recently adopted by City Council. The Landmark Gateway project was the first redevelopment project approved within this corridor, and it has committed to a \$1,233,267 contribution to the City's Housing Trust Fund. Staff feels that this project helps to strike a balance between units and monetary cash contributions within this planning area. Furthermore, the affordable units provided in this project will be located in one of the City's high capacity transit corridors which will offer significant transportation options that could further reduce the cost to residents of the affordable units. For these reasons and the estimated value of the proposed set aside units, staff supports the applicant's proposed affordable housing plan.

The recommended conditions of affordable housing plan are as follows:

1. The developer shall provide 23 affordable set-aside rental units, with the mix of units to include an equivalent percentage of each type of unit as in the whole project to the satisfaction of the Director of Housing. The portion of the affordable units applicable to each building shall be provided as each building is occupied.
2. Rents payable for the set-aside units shall not exceed the maximum rents (taking into account utility allowances) allowed under the federal Low Income Housing Tax Credit (LIHTC) program for households at or below 60% of the Washington DC Metropolitan Area Family Median Income. Rents shall remain at the established affordable rates for a period of 30 years from the date of initial occupancy of each affordable unit. The owner shall re-certify the incomes of such households annually.
3. Once an income-eligible household moves into a unit, that unit will be considered an affordable unit until the household's income increases to more than 140% of the then-current income limit. At that time, the over income household shall be allowed to remain, but the next available unit of comparable size (i.e., with the same number of bedrooms, den space and/or approximate square footage) must be made available to a qualified household. Once the comparable unit is rented, the rent of the over-income unit may then be increased to market rate in accordance with any lease restrictions.
4. Applicants receiving Housing Choice Voucher (Section 8) assistance will not be denied admission on the basis of receiving Section 8. Section 8 payments will be treated as income for the purpose of determining minimum income eligibility.
5. The set-aside units shall be of the same size, floor plan and with the same amenities as other similar units in the development. Concentrations of affordable units will be avoided.
6. If the market rents are less than anticipated, the affordable rents as defined above (as adjusted for allowances) will continue to be used as the affordable rents; however, in the event the differential between the market rents and the affordable rents falls below \$150, the affordable rents shall be reduced to maintain a differential of at least \$150 at all times.
7. The developer shall provide the City with access to the necessary records and information to enable annual monitoring of compliance with the above conditions for the 30-year affordability period.
8. Occupants of the affordable rental units shall be charged a parking fee equivalent to no more than any commonly applied management fee for one parking space per unit. Normal charges shall apply with regard to any additional parking spaces rented by such occupant.
9. Amendments to the approved Affordable Housing Plan must be submitted to the Affordable Housing Advisory Committee for consideration, and require final approval from the City Manager.



DSUP #2011-0007
Affordable Housing Plan
April 25, 2012

Project Overview

As part of their application under DSUP # 2011-0007, for the 100 South Picket Street site, the Applicant is proposing 189 dwelling units and 8,994 sq. ft. of retail space. The applicant is requesting a rezoning for the subject site from Commercial General (CG) to Commercial Residential Mixed Use Medium (CRMU-M), along with a Master Plan Map amendment to increase the maximum development height from 50 feet to 77 feet. The applicant proposes the following Affordable Housing Plan for the Project.

Affordable Housing Plan

In exchange for the rezoning and in-lieu of a monetary contribution to the City's Housing Trust Fund, the applicant proposes to proffer twenty-three (23) housing units that would be affordable to households at or below 60% of the area median income. The bedroom sizes of the affordable units would be proportionate to the bedrooms sizes of the project as a whole. The applicant would abide by the conditions established by the city for the affordable housing set aside program.

AFFORDABLE HOUSING ADVISORY COMMITTEE

Minutes of April 5, 2012 meeting

Room 2000, 301 King Street, Alexandria, VA 22314

Members Present

Michael Caison, Chair
Michael Butler
Laura Lantzy
Carter Fleming
Rick Liu
Michelle Saylor
Bill Harris
John Catlett
Katherine Dixon
Mildrilyn Davis (non voting)

Staff Present

Helen McIlvaine
Eric Keeler
Shane Cochran

Guests

Danny Abramson
Ann Marie Hay
Boyd Walker

The meeting was called to order by Michael Caison, 7:06pm.

1. The minutes were passed and approved from the March 1, 2012 meeting.
2. Staff provided an updated presentation on the FY 2013 funding request from AHDC. The funding request increased from \$200,000 in previous years to \$291,000 for 2013. Danny Abramson addressed several specific concerns related to the change. The hiring of a new Executive Director is imminent; that person will have the experience necessary to grow the organization and implement prudent strategies. AHDC's goal is to become independent from City support. Bill Harris made a motion to approve the FY funding request of \$291,000; the motion was seconded, and approved.
3. Staff provided an updated presentation on the Beauregard Small Area Plan outlining the revisions in the housing proposal. The target has increased to 800 committed affordable units. Acquisition is now earlier, some units are scheduled to be available in 2014. Deeper subsidies are being provided to target 40-75% AMI. These subsidies are funded by savings achieved from acquiring existing units, \$52.4 million increment of future City real estate tax revenue from the Beauregard redevelopment and third party leverage to be identified. The 30 year affordability period can be negotiated for a 10 year extension or non-profit/ARHA ownership. Next steps are presenting the revised plan at Town Hall meeting April 9, and Planning Commission meetings in May. Bill Harris made a motion to recommend City's approval of the Housing Chapter 5 of the Beauregard Plan; the motion was seconded and approved by a 7-1 vote.
4. Staff addressed consideration of a budget transfer of Housing Trust Fund monies. The Office of Housing requests transfer of \$200,000 from the Moderate Income Program (MIHP) to the

Homeownership Assistance Program (HAP). Discussion followed. Katherine Dixon made a motion to approve the transfer; it was seconded and approved.

5. Staff presented a summary of the City of Alexandria FY 2012 Draft Action Plan. There was an overall 46% reduction in grant funds from the City's FY2012 Action Plan. This represents a \$900,000 reduction in federal money; City money remained the same. Mildrilyn Davis reviewed several key areas of the draft plan, and discussion followed. Katherine Dixon made a motion that AHAC support the draft Action Plan as presented; it was seconded and approved.

6. Staff presented the proposed Office of Housing budget. The budget was reviewed in detail and discussions followed. The AHAC members were in agreement that a move toward restoration of the City Employee Assistance program is necessary so that more workers can afford to live in the city. Michelle Saylor made a motion to approve the proposed Office of Housing Budget, and if funds become available during the year move toward restoring the Homeownership Assistance Program and the Employee Homeownership Incentive Program; the motion was seconded and approved. It was agreed that Committee Chair Mike Caison would convey the Committee's views to council.

The meeting adjourned at 9:10pm.

Minutes prepared by Michelle Saylor

#6a

Housing Trust Fund Programs Financial Status

As of April 30, 2012

Balance as of March 31, 2012	2,418,729
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Revenues for April 2012	
Contributions	6,000
Loan Repayments	
Community Lodgings, Inc. (CLI)	2,288
Moderate Income Homeownership Program (MIHP)	30,102
Employee Homeownership Incentive Program (EHIP)	65
Fees Offsetting Expenditures	0
	38,456

Expenditures for April 2012	
Employee Homeownership Incentive Program (EHIP)	10,000
Homeownership Counseling	5,360
Housing Opportunities Fund - <i>see attached report</i>	0
HTF Homeownership Assistance Program	120,542
Moderate Income Homeownership Program (MIHP)	0
Rental Accessibility Modification Program (RAMP)	(135,902)

Balance Available Before Outstanding Commitments/Reservations	2,321,283
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Outstanding Commitments/Reservations as of April 30, 2012	
ARHA Set-Aside (James Bland 16 replacement units) - <i>other HTF revenue</i>	60,717
Employee Homeownership Incentive Program (EHIP)	80,816
HOME/HOF Match	233,098
Homeownership Counseling	67,750
HTF Homeownership Assistance Program	362,015
Housing Opportunities Fund - <i>see attached report</i>	592,038
Moderate Income Homeownership Program (MIHP)	202,584
Rental Accessibility Modification Program (RAMP)	6,101
	(1,605,118)

Unreserved Balance as of April 30, 2012	716,165
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Housing Opportunities Fund Financial Status
As of April 30, 2012

	HTRF	General Fund	HOME	TOTAL
Balance as of March 31, 2012	592,038	150,000	1,514,041	2,256,079
April 2012 Expenditures				
Balance Available Before Outstanding Commitments	592,038	150,000	1,514,041	2,256,079
Outstanding Commitments				
CLI Notabene Predevelopment		25,000		25,000
Unreserved Balance as of April 30, 2012	592,038	125,000	1,514,041	2,231,079

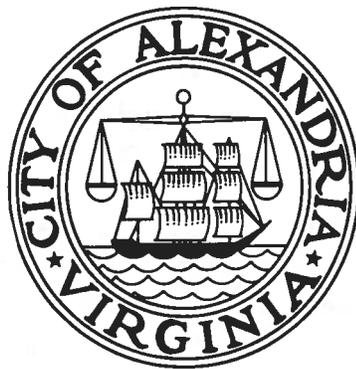
**HOMEOWNERSHIP PROGRAMS REPORT
April 2012**

	April 2012				Total FY 2012 as of April 30, 2012			
	Loans Committed	Amount and Source of Committed Loan Funds	Loans Settled	Amount and Source of Settled Loan Funds	Loans Committed	Amount and Source of Committed Loan Funds	Loans Settled	Amount and Source of Settled Loan Funds
HAP	0	\$0	1	\$25,950.32- HOME	22	HOME - \$940,885 CDBG - \$50,000	22	\$940,885- HOME \$50,000 CDBG
MIHP	1	0	1	\$30,000 - HTF	2	\$60,000 - HTF	2	\$60,000 - HTF
HTF-Homeownership Assitance	3	\$130,000 - HTF	3	\$94,050 - HTF	6	\$197,444 - HTF	4	\$107,444 - HTF
EHIP	1	\$10,000 - HTF	0	\$0	7	\$67,500 - HTF	0	\$57,500 - HTF

Loan Balances as of April 30, 2012:

HOME HAP	\$	-	Grants
CDBG HAP	\$	-	
HTF HAP	\$	362,015	
MIHP	\$	202,584	Housing Trust Fund
EHIP	\$	80,816	

**The Affordable Housing Advisory Committee
2011 - 2012 Annual Report**



JUNE 2012

**The Affordable Housing Advisory Committee (AHAC)
Annual Report, 2011 - 2012**

The Affordable Housing Advisory Committee (AHAC) is comprised of members appointed by the Alexandria City Council and is staffed by the Office of Housing. A list of the committee make up and members during the 2011-12 period is included at the end of this report. The purpose of the committee is to advise City Council on issues regarding the maintenance and promotion of affordable housing, to make recommendations for policies governing the expenditures of the City's Housing Trust Fund and Housing Opportunities Fund monies, and to oversee the administration of the Trust Fund. The AHAC held ten meetings during the annual report period including a special Town Hall meeting dealing with the housing issues surrounding the Beaugard Small Area Plan.

During the past year, the Committee dealt with the following funding requests, affordable housing plans, and issues:

A. Housing Trust Fund Funding Requests and Budget Transfers

AHAC voted on four items specifically dealing with the allocation of Housing Trust Fund monies during the course of Fiscal Year 2012. The four items included:

- 1. Rebuilding Together Alexandria:** Rebuilding Together Alexandria (RTA) is a predominantly volunteer-supported, 501(c)(3) non-profit organization that throughout the year repairs and rehabilitates homes of the elderly, disabled and low-income residents in the City of Alexandria. RTA also helps repair non-profit facilities serving Alexandria neediest residents. RTA requested a total of \$50,000 in grant funding from the Housing Trust Fund (HTF) for its FY 2012 program, which represented an increase of \$15,000 over previous funding from the Housing Trust Fund. While City Staff recommended maintaining the same funding allocation as previous years, AHAC approved the \$50,000 allocation to RTA.
- 2. Alexandria Housing Development Corporation:** AHDC requested an allocation of \$291,000 from the Housing Opportunities for FY 2013. This request exceeds the \$200,000 allocated to AHDC for the past several years. The reason for the increase was to create competitive salary and benefits package in order to hire an executive director. AHDC also is facing increasing rent charges because the free office space is no longer available as it was in years past. AHAC approved the funding request as submitted by AHDC and recommended by City Staff.
- 3. Community Lodgings, Inc.:** Information to be inserted based on June 7th action.
- 4. MIHP to HAP budget transfers:** On two separate occasions during this reporting year, the Office of Housing recommended transferring Housing Trust Fund monies from the Moderate Income Program (MHIP) to the Homeownership Assistance Program (HAP). The City had seen a decrease in MHIP applications since the addition of an equity-sharing

program in July 2009. The HAP loans offer a larger subsidy and serves lower income households, and interest remained strong during this same period. On both occasions, AHAC voted in favor of transferring money from the MIHP to HAP, which resulted in a total transfer between the two programs of \$550,000.

B. Affordable Housing Plans: During the reporting period, AHAC voted on three affordable housing plans that were included as part of the development process. The three projects, described below, included 61 units of housing that will be affordable at or below 60% of AMI.

- 1. Mt. Vernon Village Center:** This project is located in the Arlandria neighborhood of Alexandria on the current site of the MOM's Grocery Store and CVS. The applicant requested the use of Section 7-700 of the City's zoning code in order to increase the height of their proposed project. The increased height allowed by the use of Section 7-700 resulted in approximately 71,000 square feet of development all of which was within the allowable density of the site. In exchange for the bonus height and the use of the voluntary contribution as defined in the Developer's Housing Contribution Policy Work Group (June 2005), the applicant in cooperation with the Office of Housing submitted an affordable housing plan that provided twenty-eight (28) affordable set-aside rental units within the project. AHAC voted to approve this affordable housing plan.
- 2. Braddock Metro Place:** This project is located within the City's Braddock Metro Small Area Plan. The developer of this project provided two options for consideration of the Planning Commission and City Council. The first option (A) included 10 affordable units in exchange for additional height while the second option (B) proposed a building under the existing limits with a voluntary cash contribution of \$376,124, but no affordable units. The ten units included in the applicant's affordable housing plan consisted of one efficiency, five one-bedroom, and four two-bedroom units that will have affordable rents for a period of 30 years. AHAC voted in support of the affordable housing plan submitted with option A, and voted to recommend option A over option B to the City Planning Commission and City Council.
- 3. The Delaney:** This project is located on site of the current bowling lanes on Pickett Street just west of Cameron Station. The applicant requested additional height and density to build the proposed project. However, due to the amount of density increase and Master Plan Map limitations, Section 7-700 of the City's zoning code was not applicable in this case. In exchange for the rezoning and in lieu of a monetary contribution to the City's Housing Trust Fund, the applicant submitted an affordable housing plan that proffers twenty-three (23) housing units that would be affordable to households at or below 60% of the area median income. AHAC voted in favor of the applicant's affordable housing plan.

C. City Plans: The City undertook a number of planning initiatives during report period that had a direct impact on affordable housing. The major planning initiatives AHAC discussed during the reporting period are as follows:

- 1. The Strategic Plan on Aging:** The City's Office on Aging undertook a strategic plan to address the aging population in the City of Alexandria. The second goal of the plan pertained specifically to housing issues for this population. This goal provides targets for affordable housing, accessible and adaptable housing, assisted living, supportive care and independent living facilities. Mary Ann Griffin of the City's Office on Aging presented the draft plan to the committee in November and described the findings pertaining to housing. Many of the goals of the Strategic Plan on Aging mirrored the goals of the Housing Master Plan and the committee voted to provide a letter of support to City Council for the plan. Chairman Michael Caison submitted a letter to Council on behalf of the Committee on (insert date).
- 2. City of Alexandria Housing Action Plan:** The City of Alexandria FY 2013 Action Plan serves as the application for the Federal Fiscal Year (FFY) 2012 allocations of federal Community Development Block Grant (CDBG) and HOME Investment Partnership funds. The FY 2013 Action Plan covers the period beginning July 1, 2012 to June 30, 2013. It describes how City programs and activities will be carried out to promote the third year of the City's FY 2011- 2015 Consolidated Plan goals. It also describes how federal, state, City, and private funds will be allocated to address the housing and community development needs of the low- to moderate-income populations, homeless and special needs populations, and any target areas the City has identified. Staff presented the action plan to AHAC in April and the committee voted to support the plan.
- 3. Beauregard Small Area Plan:** The Beauregard Planning Area contains a significant supply of the City's market rate affordable housing. The developers involved with this project proposed to demolish many of the garden style apartments that are located within this area. Of the nine regular scheduled AHAC meetings during the reporting period, discussion of the Beauregard Plan was included on the agenda on seven occasions. In addition, AHAC hosted a housing town hall meeting on the housing issues pertaining to the Beauregard Small Area Plan in February.

Housing staff worked with the Planning and Zoning Department as well as the future developers located within the plan area to establish a robust affordable housing component of the Beauregard Small Area Plan. After several iterations, the final proposed plan included over \$120 million for affordable housing, which unleveraged would equate to approximately 800 units of dedicated affordable housing. These units would be affordable to households at a variety of income ranging from 40% of AMI to 75% of AMI with over 90% of the units reserved for households at or below 60% of AMI. Staff presented the final plan to AHAC during the April meeting. The committee voted to support the housing portion of the plan by a 7 – 1 vote.

Voting Members: 14

- 1 Builder or developer of residential property
- 1 Real estate professional with knowledge and experience in residential real estate
- 1 Landlord of residential property in the City
- 1 Residential tenant in the City
- 1 Homeowner in the City
- 1 Commissioner from the ARHA Board
- 1 Representative of the City's faith community
- 1 Representative of a civic association in the City
- 1 Representative who is employed by or affiliated with an organization that promotes and maintains affordable housing
- 1 Financial professional with knowledge and experience in the field of finance as it relates to residential housing
- 1 Representative of an employer in the city who employs at least 100 employees
- 1 Licensed and practicing attorney
- 1 Person designated by, but who need not be a member of the Commission on Aging
- 1 Person who is either a City employee or a teacher with the Alexandria City Public Schools

Voting Members during 2010-2011:

- Michael Butler
- Michael Caison, Chair
- John Corrado (July 2010 – March 2012)
- Carter Flemming
- William Harris
- Shelly (Bob) Kaufman (July 2011 – December 2011)
- Laura Lantzy
- Rick Liu
- Patrick McCreesh
- Katherine Dixon (formerly Medina)
- Kenya Newby
- Dimitri Warren (September 2011 – March 2012)
- Sonya Sacks (July 2011 – May 2012)
- John Catlett (April 2012 – June 2012)
- Michelle Saylor (January 2012 – June 2012)

