



A COMMUNITY OF POSSIBILITIES

VIRTUAL**Number:** (346) 248-7799**Meeting ID:** 93839434337#**Passcode:** 654170#**IN PERSON**

818 S. Flores St.

San Antonio, TX 78204

BOARD OF COMMISSIONERSDr. Ana "Cha" Guzmán
ChairGabriel Lopez
Vice ChairGilbert Casillas
CommissionerDalia Contreras
CommissionerLoren D. Dantzer
CommissionerOlga Kauffman
CommissionerIgnacio Perez
Commissioner**PRESIDENT & CEO**

Ed Hinojosa, Jr.

OPERATIONS AND REAL ESTATE COMMITTEE MEETING OR SPECIAL BOARD MEETING

1:00 p.m. | Wednesday | October 19, 2022

If this meeting becomes a Special Board Meeting, at least four Commissioners will be physically present at this location, and up to three other Commissioners may attend by videoconferencing, as permitted by Tex. Gov't Code Section 551.127, and the Presiding Officer will also be present at this location.

MEETING CALLED TO ORDER

1. The Board of Commissioners or its Committee may hold a closed meeting pursuant to Texas Government Code § 551.071-076 for consultation concerning attorney-client matters, real estate, litigation, personnel, and security matters. The Board or Committee reserves the right to enter into closed meeting at any time during the course of the meeting.

PUBLIC COMMENT

2. **Public Comment** - Citizens are provided up to three minutes each to speak to any agenda items. Citizens wishing to speak to items posted on the agenda should access Phone Number: **(346) 248-7799** and enter Meeting ID: **93839434337#** and Passcode: **654170#**, prior to 12:45 p.m. A Spanish/English translator will be available to citizens needing translation.

Now is the time for public comments. The Board asks the public to address concerns related to Opportunity Home matters and policy and not include statements that may be considered defamatory of any individual. The Board encourages members of the public to direct specific concerns or problems to Opportunity Home staff for more prompt resolution. The Board will not discuss the comments of speakers or respond to speakers during the public comment portion of the agenda.

PRESENTATIONS

3. Update and Presentation by regarding Alazan by Able City
4. Update and Presentation regarding Lincoln Heights by Saldana & Associates

INDIVIDUAL ITEMS

5. Consideration and appropriate action regarding Resolution 6286, approving the Payment Standard Schedule at 100% of Fair Market Rents (FMRs) for the Project-Based Voucher (PBV) Program (Stephanie Rodriguez, Director of Assisted Housing Programs)
6. Consideration and appropriate action regarding Resolution 6287, authorizing the award of contracts for Recertification Processing Services to Nan McKay and Associates (WBE) and Gilson Software Solutions d/b/a Gilson Property Management Services for an annual cumulative amount not to exceed \$500,000.00; for a period of one year with the option to renew up to four additional

one year terms (Stephanie Rodriguez, Director of Assisted Housing Programs; George Ayala, Director of Procurement)

7. Consideration and appropriate action regarding Resolution 6288, authorizing the award of a contract for HVAC Products, Installation, Labor Based Solutions and Related Products and Services to Trane U.S., Inc. through Omnia Partners, Public Sector for an annual cumulative amount not to exceed \$2,000,000.00; for a period of one year with the option to renew up to four additional one-year terms (Hector Martinez, Director of Construction Services and Sustainability; George Ayala, Director of Procurement)

DISCUSSION ITEM

8. Discussion regarding resident concerns

REPORT

- Procurement Activity Report

RESOURCE

- Schedule of Units Under Development

9. Adjournment


*Note: Whenever the Texas Open Meetings Act (Section 551.001 et seq. of the Texas Government Code) provides for a closed meeting in matters concerning legal advice, real estate, contracts, personnel matters, or security issues, the Board may find a closed meeting to be necessary. For convenience of the citizens interested in an item preceded by an asterisk, notice is given that a closed meeting is contemplated. However, the Board reserves the right to go into a closed meeting on any other item, whether it has an asterisk, when the Board determines there is a need and a closed meeting is permitted.

"Pursuant to § 30.06, Penal Code, (trespass by holder license holder with a concealed handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not attend this meeting with a concealed handgun."

"Pursuant to § 30.07, Penal Code, (trespass by holder license holder with an openly carried handgun), a person licensed under Subchapter H, Chapter 411, Government Code (handgun licensing law), may not attend this meeting with a handgun that is carried openly."

BOARD OF COMMISSIONERS
Operations and Real Estate Committee

RESOLUTION 6286, APPROVING THE PAYMENT STANDARD SCHEDULE AT 100% OF FAIR MARKET RENTS FOR THE PROJECT-BASED VOUCHER PROGRAM

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Ed Hinojosa, Jr.
 President and CEO

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Stephanie Rodriguez
 Director of Assisted Housing Programs

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6286, approving the Payment Standard Schedule at 100% of Fair Market Rents (FMRs) for the Project-Based Voucher (PBV) Program.

FINANCIAL IMPACT:

There is an estimated annual impact on the current Housing Assistance Payment Contract of \$19,224.00 or an 8.2% increase.

Table 1. Opportunity Home Payment Standard and HUD Fair Market Rent Comparison

	0 BR	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR
2023 Payment Standard Schedule (Proposed)	918	1057	1282	1631	1987	2285	2583
2023 HUD Fair Market Rents	918	1057	1282	1631	1987	2285	2583
Percentage of FMR	100%	100%	100%	100%	100%	100%	100%
2022 Payment Standard Schedule (Current)	734	865	1049	1350	1664	1913	2164
2022 HUD Fair Market Rents	815	961	1165	1500	1849	2126	2404
Percentage of FMR	90%	90%	90%	90%	90%	90%	90%

SUMMARY:

The U.S. Department of Housing and Urban Development (HUD) publishes Fair Market Rents (FMRs) annually for each area of the United States and requires each housing authority to adopt a payment standard schedule for each FMR area in its jurisdiction. Payment standard is defined as “the maximum assistance payment for a family assisted in the voucher program (before deducting the total tenant payment by the family)” [24 CFR 982.4(b)]. HUD permits the housing authority to establish a payment standard amount for each unit size at any level between 90% and 110%—referred to as the “basic range”—of the FMR for the unit size [24 CFR 982.503(b)(1)(i)].

In November 2016, the Small Area Fair Market Rent (SAFMR) Final Rule (Federal Register Notice FR-5855-F-03) mandated certain metropolitan areas, including the San Antonio-New Braunfels

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metro area, to use SAFMRs in the Housing Choice Voucher (HCV) program. The Final Rule provided an exception for project-based vouchers, allowing PHAs the option to apply SAFMRs to PBV developments. Opportunity Home elected not to apply SAFMRs to PBV developments.

In September 2022, HUD published the 2023 FMRs. HUD allows housing authorities to establish the payment standard amounts at any level between 90% and 110% of the published FMR. The 2023 FMRs represent an across-the-board increase for the San Antonio-New Braunfels Metropolitan Statistical Area (MSA). Staff believe that these increases are consistent with today's current market trends and will expand the housing opportunities for our program participants.

The proposed payment standards for 2023 will be effective for all vouchers issued after December 1, 2022 and all recertifications with an effective date of February 1, 2023 or later.

STRATEGIC OUTCOME:

Opportunity Home residents have a sufficient supply of affordable housing options.

ATTACHMENTS:

Resolution 6286

**Opportunity Home San Antonio
Resolution 6286**

RESOLUTION 6286, APPROVING THE PAYMENT STANDARD SCHEDULE AT 100% OF FAIR MARKET RENTS FOR THE PROJECT-BASED VOUCHER PROGRAM

WHEREAS, the U.S. Department of Housing and Urban Development (HUD) annually establishes fair market rents (FMRs) for each area in the United States; and

WHEREAS, HUD requires the Public Housing Authority to establish voucher payment standards for each unit size; and

WHEREAS, Opportunity Home staff requests authorization to establish payment standards at 100% of the 2023 FMR schedule, in order to ensure the current payment standard schedule is compliant with federal regulations.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6286, approving the Payment Standard Schedule at 100% of Fair Market Rents for the Project-Based Voucher Program.
- 2) Authorizes the President and CEO or designee to execute all necessary documents and extensions.

Passed and approved the 2nd day of November 2022.

Ana M. "Cha" Guzman

Chair, Board of Commissioners


Attested and approved as to form:


Ed Hinojosa, Jr.


President and CEO

BOARD OF COMMISSIONERS
Operations and Real Estate Committee Meeting

RESOLUTION 6287, AUTHORIZING THE AWARD OF CONTRACTS FOR RECERTIFICATION PROCESSING SERVICES TO NAN MCKAY AND ASSOCIATES (WBE) AND GILSON SOFTWARE SOLUTIONS D/B/A GILSON PROPERTY MANAGEMENT SERVICES FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$500,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE YEAR TERMS

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Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

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Stephanie Rodriguez
Director of Assisted Housing Programs

DocuSigned by:

23FA86FCE5954A7...
George Ayala
Director of Procurement

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6287, authorizing the award of contracts for Recertification Processing Services to Nan McKay and Associates (WBE) and Gilson Software Solutions d/b/a Gilson Property Management Services for an annual cumulative amount not to exceed \$500,000.00; for a period of one year with the option to renew up to four additional one year terms.

FINANCIAL IMPACT:

The current award recommendation for Recertification Processing Services is not expected to exceed an annual cumulative amount of \$500,000.00 and will be funded through departmental budgets or available reserves.

SUMMARY:

Opportunity Home requires the services of a vendor to assist with the processing of overflow and late recertifications, as well as providing ongoing-as-needed services in this area for all Affordable Housing Programs, to include, but not limited to, Public Housing, Housing Choice Vouchers, Project-Based Rental Assistance, and Tax Credits. Under this award, the vendor shall assign recertification specialists with preferred qualifications to include: training related to housing authority operations; bi-lingual in english and spanish; and hold certifications as housing choice voucher specialist and/or public housing specialist.

On July 26, 2022, Opportunity Home issued a Request for Proposals (RFP) #2205-5285 for Recertification processing services that closed on August 16, 2022. The RFP was published on the Opportunity Home's E-Procurement Website, the Hart Beat, NAHRO E-Procurement website, and directly solicited to 153 vendors. A total of three proposals were received in response to this solicitation: Gilson Software Solutions dba Gilson Property Management Services, Nan McKay and Associates (WBE), and Quadel Consulting and Training. One response was deemed non responsive as the proposer did not include pricing in their response as required by the solicitation. The remaining proposals were evaluated on the following criteria: qualifications and experience, respondent's proposed staff qualifications, price proposal, and the respondents proposed SWMBE Utilization Plan.

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Resolution 6278, approved on September 13, 2022, utilizing the President and CEO's delegated approval authority authorized the award of contracts to Gilson Software Solutions dba Gilson Property Management Services and Nan McKay and Associates for essential recertification processing services. It was decided that the initial amounts estimated for performance of the services would not be adequate. Thus, this request would increase the amount necessary for completion of the recertification processing services and replace the original approval made by the CEO.

COMPANY PROFILES:

Gilson Software Solutions was established in 2008 and is headquartered in Ft. Lauderdale, Florida with field office locations in Miami and Orlando, Florida; Salem, Massachusetts, and Providence, Rhode Island. They assist Housing Authorities with tasks to include, but are not limited to, Call Center Services, Application Processing, Re-certification Processing, performing Housing Quality Standards (HQS) Inspections, and Maintenance Services. They work with Texas Housing Authorities to include: Beaumont Housing Authority, Corpus Christi Housing Authority, Dallas Housing Authority, El Paso Housing Authority, and Harris County Housing Authority.

Nan McKay & Associates was established in 1980 and is headquartered in San Diego, California with field office locations in Connecticut, Florida, Illinois, Kentucky, Louisiana, and Houston, Texas. This vendor self-certifies as a WBE. They have extensive experience in all areas of HUD's Public and Indian Housing programs, including Housing Choice Voucher (HCV), Project Based Voucher (PBV), and public housing. Nan McKay has assisted housing agencies of all sizes in staffing short-term operational support positions as well as long-term program management, and they currently administer more than 110,000 vouchers for some of the larger housing authorities. They offer a variety of services that include Management Occupancy Review (MOR), Technical Suitability of Products (TSP)'s, Enterprise Income Verification (EIV) policies, custom policies for Rental Assistance Demonstration (RAD) conversions, Project Based Rental Assistance (PBRA) and Low Income Housing Tax Credit (LIHTC) training and certification, and inspection services. They have worked with public housing authorities (PHAs) to include, but not limited to: Chicago Housing Authority, Georgetown Housing Authority, Housing Authority of the County of Alameda, Housing Authority of Jefferson Parish, Ithaca Housing Authority, Lynn Housing Authority & Neighborhood Development, Marin Housing Authority, Miami-Dade County, Public Housing & Community Development, San Diego Housing Commission, and San Francisco Housing Authority.

PRIOR AWARDS:

Gilson Software Software and Call Center Services is currently under contract and has received a prior award to provide answering services for Beacon Communities and has performed satisfactorily under the awarded contract.

Nan McKay has received prior awards for Self Sufficiency Coordinator Training, Family Self Sufficiency Webinar and Certifications, Operational and Organizational Assessment Consulting Services, Housing Choice Voucher Executive Management Training, and Public Housing Specialist Training. Nan McKay performed satisfactorily under the awarded contracts.

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CONTRACT OVERSIGHT:

Contract oversight will be provided by the Directors of Assisted Housing Programs, Beacon Communities, and Public Housing who will monitor the vendor's adherence to contract requirements and performance.

STRATEGIC OUTCOME:

Opportunity Home residents have a sufficient supply of affordable housing options.

ATTACHMENTS:

Resolution 6287

Scoring Matrix

Advertisement List

**Opportunity Home San Antonio
Resolution 6287**

RESOLUTION 6287, AUTHORIZING THE AWARD OF CONTRACTS FOR RECERTIFICATION PROCESSING SERVICES TO NAN MCKAY AND ASSOCIATES (WBE) AND GILSON SOFTWARE SOLUTIONS D/B/A GILSON PROPERTY MANAGEMENT SERVICES FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$500,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE YEAR TERMS

WHEREAS, on July 26, 2022, Opportunity Home issued a Request for Proposals (RFP) #2205-5285 for Recertification processing services that closed on August 16, 2022; and

WHEREAS, three proposals were received in response to this solicitation. One proposal was deemed non responsive as the proposer did not include pricing in their response as required by the solicitation; and

WHEREAS, Resolution 6278, approved on September 13, 2022, utilizing the President and CEO's delegated approval authority authorized the award of contracts to Gilson Software Solutions dba Gilson Property Management Services and Nan McKay and Associates for essential recertification processing services. It was decided that the initial amounts estimated for performance of the services would not be adequate. Thus, this request would increase the amount necessary for completion of the recertification processing services and replace the original approval made by the CEO; and

WHEREAS, the current award recommendation for Recertification Processing Services is not expected to exceed an annual cumulative amount of \$500,000.00 and will be funded through departmental budgets or available reserves.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6287, authorizing the award of contracts for Recertification Processing Services to Nan McKay and Associates (WBE) and Gilson Software Solutions d/b/a Gilson Property Management Services for an annual cumulative amount not to exceed \$500,000.00; for a period of one year with the option to renew up to four additional one year terms.
- 2) Authorizes the President and CEO or designee to execute all necessary documents and extensions.

Passed and approved the 2nd day of November 2022.

Ana M. "Cha" Guzman

Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.

President and CEO



RFP 2205-5285 - Re-certification processing Services Scoring Summary

	Total	Qualifications and Experience	Respondent's Proposed Staff Qualifications	Quality Assurance Plan:	Price proposal	SWMBE utilization:
Supplier	/ 100 pts	/ 40 pts	/ 10 pts	/ 10 pts	/ 35 pts	/ 5 pts
Nan McKay and Associates	67.54	34.67	8.667	8	14.54 (\$44,810.00)	1.667
Gilson Software and Call Center Services	67	21.33	5.333	4.667	35 (\$18,620.00)	0.66667



Advertisement List

2205-5285 Re-certification processing Services

#	Email Address or Domain Name	Date Invited
1	abel@davilaconstruction.com	Jul 26th 2022, 9:31 AM CDT
2	abelardohdz28@gmail.com	Jul 26th 2022, 9:31 AM CDT
3	adeoliveira@goodwillsa.org	Jul 26th 2022, 9:31 AM CDT
4	admin@boleroventures.com	Jul 26th 2022, 9:31 AM CDT
5	admin@hcadesa.org	Jul 26th 2022, 9:31 AM CDT
6	admin@sawomenschamber.org	Jul 26th 2022, 9:31 AM CDT
7	adriananavarro3@hotmail.com	Jul 26th 2022, 9:31 AM CDT
8	aflores@air-streamservices.com	Jul 26th 2022, 9:31 AM CDT
9	al@southsa.org	Jul 26th 2022, 9:31 AM CDT
10	alexdelcampo@mdcpainting.com	Jul 26th 2022, 9:31 AM CDT
11	allmaterialsconstruction@gmail.com	Jul 26th 2022, 9:31 AM CDT
12	amelie@gmrcctx.com	Jul 26th 2022, 9:31 AM CDT
13	andrew@tejaspremierbc.com	Jul 26th 2022, 9:31 AM CDT
14	annahayden@jmicontractors.com	Jul 26th 2022, 9:31 AM CDT
15	anne@acectx.org	Jul 26th 2022, 9:31 AM CDT
16	bexarpepp@sbcglobal.net	Jul 26th 2022, 9:31 AM CDT
17	bids@wbea-texas.org	Jul 26th 2022, 9:31 AM CDT
18	billclark@dljcoatings.com	Jul 26th 2022, 9:31 AM CDT
19	blackchamber@aol.com	Jul 26th 2022, 9:31 AM CDT
20	briannad@sahcc.org	Jul 26th 2022, 9:31 AM CDT
21	brtx@brtexas.com	Jul 26th 2022, 9:31 AM CDT
22	bugconst@gmail.com	Jul 26th 2022, 9:31 AM CDT
23	can2roofing@gmail.com	Jul 26th 2022, 9:31 AM CDT
24	CCastillo@alphabuilding.com	Jul 26th 2022, 9:31 AM CDT
25	cjohnson@sctrca.org	Jul 26th 2022, 9:31 AM CDT
26	constructionadmin@smartlocating.com	Jul 26th 2022, 9:31 AM CDT
27	content@constructconnect.com	Jul 26th 2022, 9:31 AM CDT
28	Darren_Friesenhahn@homedepot.com	Jul 26th 2022, 9:31 AM CDT
29	dave@hcadesa.org	Jul 26th 2022, 9:31 AM CDT
30	david@atriumroofing.com	Jul 26th 2022, 9:31 AM CDT
31	DGiammarino@constructionjournal.com	Jul 26th 2022, 9:31 AM CDT
32	dljroofing@work-pros.com	Jul 26th 2022, 9:31 AM CDT
33	donnie@dggroofing.com	Jul 26th 2022, 9:31 AM CDT
34	dpetersen@sachamber.org	Jul 26th 2022, 9:31 AM CDT
35	dwaller@infinite-pipeline.com	Jul 26th 2022, 9:31 AM CDT
36	elva.adams@wellsfargo.com	Jul 26th 2022, 9:31 AM CDT

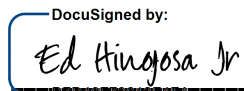
37	enrique@mtsconstructor.com	Jul 26th 2022, 9:31 AM CDT
38	exdir@hcadesa.org	Jul 26th 2022, 9:31 AM CDT
39	faircontractingcoalitioninfo@gmail.com	Jul 26th 2022, 9:31 AM CDT
40	fivestarindustries@hotmail.com	Jul 26th 2022, 9:31 AM CDT
41	franksubia1023@gmail.com	Jul 26th 2022, 9:31 AM CDT
42	fruiz@pmrtx.com	Jul 26th 2022, 9:31 AM CDT
43	gabrielle@smsdc.org	Jul 26th 2022, 9:31 AM CDT
44	garciaezup@gmail.com	Jul 26th 2022, 9:31 AM CDT
45	GBMR.REPAIRS@YAHOO.COM	Jul 26th 2022, 9:31 AM CDT
46	hector@hegarciacpa.com	Jul 26th 2022, 9:31 AM CDT
47	Heidi@phcc-sanantonio.org	Jul 26th 2022, 9:31 AM CDT
48	herconstructioncompanySATx@gmail.com	Jul 26th 2022, 9:31 AM CDT
49	hkarpjr@yahoo.com	Jul 26th 2022, 9:31 AM CDT
50	info@aiasa.org	Jul 26th 2022, 9:31 AM CDT
51	info@alamocitychamber.org	Jul 26th 2022, 9:31 AM CDT
52	info@dkhaneyroofing.com	Jul 26th 2022, 9:31 AM CDT
53	info@jacoroofting.com	Jul 26th 2022, 9:31 AM CDT
54	info@newwavevolution.com	Jul 26th 2022, 9:31 AM CDT
55	info@scs.net	Jul 26th 2022, 9:31 AM CDT
56	info@westsachamber.org	Jul 26th 2022, 9:31 AM CDT
57	integrated02@aol.com	Jul 26th 2022, 9:31 AM CDT
58	Jacqueline.Jackson@utsa.edu	Jul 26th 2022, 9:31 AM CDT
59	james@jamesbrownjr360.com	Jul 26th 2022, 9:31 AM CDT
60	Jason.Hennesey@spawglass.com	Jul 26th 2022, 9:31 AM CDT
61	jay@gmcb blueservice.com	Jul 26th 2022, 9:31 AM CDT
62	jbolewa1@gmail.com	Jul 26th 2022, 9:31 AM CDT
63	jcs candrsatx@gmail.com	Jul 26th 2022, 9:31 AM CDT
64	jeannette@virtualbx.com	Jul 26th 2022, 9:31 AM CDT
65	jennifer.mort@utsa.edu	Jul 26th 2022, 9:31 AM CDT
66	jennifer@asasanantonio.org	Jul 26th 2022, 9:31 AM CDT
67	jennifer@tspe.org	Jul 26th 2022, 9:31 AM CDT
68	jhoward@iecsanantonio.com	Jul 26th 2022, 9:31 AM CDT
69	jim@alamobonds.com	Jul 26th 2022, 9:31 AM CDT
70	jjpainting2100@gmail.com	Jul 26th 2022, 9:31 AM CDT
71	jlbass47@jlbassconstruction.com	Jul 26th 2022, 9:31 AM CDT
72	joe.muniz@jamcoventures.com	Jul 26th 2022, 9:31 AM CDT
73	jorge@apgc.pro	Jul 26th 2022, 9:31 AM CDT
74	jpuente.geofill@outlook.com	Jul 26th 2022, 9:31 AM CDT
75	jmauldin@coconcepts.com	Jul 26th 2022, 9:31 AM CDT
76	julie@westsachamber.org	Jul 26th 2022, 9:31 AM CDT
77	justin.calvin@spawglass.com	Jul 26th 2022, 9:31 AM CDT
78	justin@southtxc.com	Jul 26th 2022, 9:31 AM CDT
79	kimr@avacpa.com	Jul 26th 2022, 9:31 AM CDT

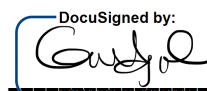
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81	ksutterfield@sabuilders.com	Jul 26th 2022, 9:31 AM CDT
82	kwoods@kentexroofing.com	Jul 26th 2022, 9:31 AM CDT
83	landscapeas@yahoo.com	Jul 26th 2022, 9:31 AM CDT
84	laura@mmwtx.com	Jul 26th 2022, 9:31 AM CDT
85	lgjosiahconstruction@gmail.com	Jul 26th 2022, 9:31 AM CDT
86	linda.ryan@fidelitypartners.org	Jul 26th 2022, 9:31 AM CDT
87	liselaleman@yahoo.com	Jul 26th 2022, 9:31 AM CDT
88	logan@jmi-contractors.com	Jul 26th 2022, 9:31 AM CDT
89	lparr@universalmarketing1.com	Jul 26th 2022, 9:31 AM CDT
90	Madeline@masarchitecture.com	Jul 26th 2022, 9:31 AM CDT
91	mariyaf@sahcc.org	Jul 26th 2022, 9:31 AM CDT
92	martha@ashercontractors.com	Jul 26th 2022, 9:31 AM CDT
93	martham@recsanantonio.com	Jul 26th 2022, 9:31 AM CDT
94	matt@gilsonsoftware.com	Jul 26th 2022, 9:31 AM CDT
95	mca-smacna@mca-smacna.org	Jul 26th 2022, 9:31 AM CDT
96	mcfarland9598@gmail.com	Jul 26th 2022, 9:31 AM CDT
97	md.ramswx@gmail.com	Jul 26th 2022, 9:31 AM CDT
98	mg.assoc.mgmt@gmail.com	Jul 26th 2022, 9:31 AM CDT
99	Mike@cleanologyservices.com	Jul 26th 2022, 9:31 AM CDT
100	mike@empireroofing.com	Jul 26th 2022, 9:31 AM CDT
101	mike@mcnielroofing.com	Jul 26th 2022, 9:31 AM CDT
102	mkmconstruction@att.net	Jul 26th 2022, 9:31 AM CDT
103	mlp@att.net	Jul 26th 2022, 9:31 AM CDT
104	mlund@hytekgc.com	Jul 26th 2022, 9:31 AM CDT
105	mteel@ncs-tx.com	Jul 26th 2022, 9:31 AM CDT
106	munizjuan60@yahoo.com	Jul 26th 2022, 9:31 AM CDT
107	nawicerin@gmail.com	Jul 26th 2022, 9:31 AM CDT
108	nawicsatx@gmail.com	Jul 26th 2022, 9:31 AM CDT
109	nikkiprt@bellsouth.net	Jul 26th 2022, 9:31 AM CDT
110	orestes.hubbard@utsa.edu	Jul 26th 2022, 9:31 AM CDT
111	proposals@coastprofessional.com	Jul 26th 2022, 9:31 AM CDT
112	ptac@utsa.edu	Jul 26th 2022, 9:31 AM CDT
113	ramrockroofing@gmail.com	Jul 26th 2022, 9:31 AM CDT
114	randyhunter@recind.com	Jul 26th 2022, 9:31 AM CDT
115	raul@apgc.pro	Jul 26th 2022, 9:31 AM CDT
116	rauljr@apgc.pro	Jul 26th 2022, 9:31 AM CDT
117	ray@hillsoftexas.com	Jul 26th 2022, 9:31 AM CDT
118	ray@sandersroofs.com	Jul 26th 2022, 9:31 AM CDT
119	rfpleads@netsync.com	Jul 26th 2022, 9:31 AM CDT
120	robertblume@nir.com	Jul 26th 2022, 9:31 AM CDT
121	robertolivo@tibh.org	Jul 26th 2022, 9:31 AM CDT
122	rodeggaard@hjdcapital.com	Jul 26th 2022, 9:31 AM CDT

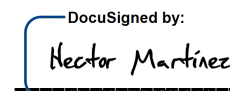
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124	rvasquez@iecsanantonio.com	Jul 26th 2022, 9:31 AM CDT
125	rwb3servicesllc@gmail.com	Jul 26th 2022, 9:31 AM CDT
126	sales@signius.com	Jul 26th 2022, 9:31 AM CDT
127	sanantonioagc@gmail.com	Jul 26th 2022, 9:31 AM CDT
128	savecocorp@gmail.com	Jul 26th 2022, 9:31 AM CDT
129	sbabb@alphabuilding.com	Jul 26th 2022, 9:31 AM CDT
130	schedule@roofdoctortx.com	Jul 26th 2022, 9:31 AM CDT
131	sean@jmicontractors.com	Jul 26th 2022, 9:31 AM CDT
132	shelly@southtxc.com	Jul 26th 2022, 9:31 AM CDT
133	SHoefer@jnational.com	Jul 26th 2022, 9:31 AM CDT
134	shussain@goodwill.sa.org	Jul 26th 2022, 9:31 AM CDT
135	smsdc@smsdc.org	Jul 26th 2022, 9:31 AM CDT
136	Starling.roofing@yahoo.com	Jul 26th 2022, 9:31 AM CDT
137	Steve@mandmpaint.com	Jul 26th 2022, 9:31 AM CDT
138	suzanne.ballinger@ampyss.com	Jul 26th 2022, 9:31 AM CDT
139	Suzanne@sabor.com	Jul 26th 2022, 9:31 AM CDT
140	Tamara@abcsouthtexas.org	Jul 26th 2022, 9:31 AM CDT
141	tciroofing-2@live.com	Jul 26th 2022, 9:31 AM CDT
142	thefel@phoenixexteriors.com	Jul 26th 2022, 9:31 AM CDT
143	thesamca@gmail.com	Jul 26th 2022, 9:31 AM CDT
144	thomas@nemoiadv.com	Jul 26th 2022, 9:31 AM CDT
145	tme1construction@gmail.com	Jul 26th 2022, 9:31 AM CDT
146	trevinocont@live.com	Jul 26th 2022, 9:31 AM CDT
147	trishalira@usmammoth.com	Jul 26th 2022, 9:31 AM CDT
148	TRuiz@jnational.com	Jul 26th 2022, 9:31 AM CDT
149	valerie.abilityrenovations@gmail.com	Jul 26th 2022, 9:31 AM CDT
150	vinnie@davilaconstruction.com	Jul 26th 2022, 9:31 AM CDT
151	warren@recind.com	Jul 26th 2022, 9:31 AM CDT
152	wolfroofingtx@gmail.com	Jul 26th 2022, 9:31 AM CDT
153	zavala@ntroofing.net	Jul 26th 2022, 9:31 AM CDT

BOARD OF COMMISSIONERS
Operations and Real Estate Committee Meeting

RESOLUTION 6288, AUTHORIZING THE AWARD OF A CONTRACT FOR HVAC PRODUCTS, INSTALLATION, LABOR BASED SOLUTIONS, AND RELATED PRODUCT AND SERVICES TO TRANE U.S., INC. THROUGH OMNIA PARTNERS, PUBLIC SECTOR FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$2,000,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE-YEAR TERMS

DocuSigned by:

 D7D46F73613F4FA...
Ed Hinojosa, Jr.
President and CEO

DocuSigned by:

 23FA86FCE5954A7...
George Ayala
Director of Procurement

DocuSigned by:

 ABBB9B06757A4D5...
Hector Martinez
Director of Construction Services and Sustainability

REQUESTED ACTION:

Consideration and appropriate action regarding Resolution 6288, authorizing the award of a contract for HVAC Products, Installation, Labor Based Solutions and Related Products and Services to Trane U.S., Inc. through Omnia Partners, Public Sector for an annual cumulative amount not to exceed \$2,000,000.00; for a period of one year with the option to renew up to four additional one-year terms.

FINANCIAL IMPACT:

The cost for HVAC products, installation, labor based solutions and related products and services is not expected to exceed an annual cumulative amount of \$2,000,000.00 and will be funded through the Capital Fund Program, approved operating budgets, or available reserves.

SUMMARY:

Opportunity Home requires the services of a contractor to maintain, repair, and if required replace the commercial HVAC systems and the chiller and boiler systems at various Opportunity Home properties. This award will also incorporate all services included in Trane's cooperative award through Omnia Partners, Public Sector.

Currently, Opportunity Home has Agreements in place for Residential HVAC Maintenance and Repair, Chiller and Boiler Maintenance and Repair, and Closed Loop Systems Water Treatment.

HUD encourages Housing Authorities to utilize cooperative and interagency agreements to simplify and expedite the procurement processes. Purchasing Cooperatives assign a lead agency for its solicitations to insure that competitive bid requirements for most state and local government agencies are followed; therefore, Opportunity Home is not required to issue its own competitive solicitation in cases where the use of available contracts are appropriate and in accordance with Opportunity Home's procurement policies.

Once the lead public agency has awarded a contract with the supplier, participating Public Agencies in need of similar products and services are able to make purchases through the

Opportunity Home San Antonio**October 19, 2022**

Omnia Partners contracts. This ensures that the same terms and conditions of the lead agency's awarded contract apply to the participants. Opportunity Home is currently a member of Omnia Partners, a nationwide purchasing cooperative.

On June 15, 2022, Racine County Wisconsin, the lead agency for Omnia Partners issued IFB#RC2022-1001 to establish a national cooperative contract for HVAC Products, Installation, Labor Based Solutions, and Related Products and Services that closed on July 21, 2022. Trane U.S. Inc. was the lowest responsive, responsible, and qualified bidder based on the requirements issued in the IFB. Racine County awarded Trane U.S. Inc. contract #3341 that is effective September 1, 2022 to August 31, 2027 with the option to renew for one (1) additional five (5) year period.

Opportunity Home is requesting approval to utilize the services under this awarded contract for a period of one year with the option to renew up to four additional one year terms.

COMPANY PROFILE:

Trane was founded in 1885 and its North American headquarters is in Davidson, North Carolina. They have more than 360 offices throughout the United States and Canada to include Texas office locations in San Antonio, Austin, Dallas, Carrollton, Houston, McGregor, Tyler, and Waco. They are a manufacturer of heating, ventilation, and air conditioning systems, along with building management systems and controls. The services under their Omni Partners awarded contract include Operate, Maintain and Repair; Energy and Sustainability; Design, Upgrade and Modernize; Building Systems and Technologies; Building Management and Automation; and Design and Analysis Software tools.

PRIOR AWARD:

Trane is currently a Board approved award to provide services to include, but not limited to, maintain, repair, and if required replace commercial HVAC and chiller and boiler systems. During the term of the award, they have been engaged to provide: HVAC chiller replacement at Villa Tranchese, chiller and pump system at Villa Hermosa, comprehensive HVAC upgrade at Central Office, preventative maintenance and quarterly air filter changes at Central Office, chiller replacement at Blanco, feasibility and sound assessment study, acoustical project, and domestic hot water boiler controls at Victoria Plaza. They have performed satisfactory under the awarded projects.

CONTRACT OVERSIGHT:

Contract oversight will be provided by Mark DeLuna, Maintenance Superintendent, who will monitor the vendor's adherence to contract requirements and performance.

STRATEGIC OUTCOMES:

Opportunity Home's residents live in quality affordable housing.

ATTACHMENT:

Resolution 6288

**Opportunity Home San Antonio
Resolution 6288**

RESOLUTION 6288, AUTHORIZING THE AWARD OF A CONTRACT FOR HVAC PRODUCTS, INSTALLATION, LABOR BASED SOLUTIONS, AND RELATED PRODUCT AND SERVICES TO TRANE U.S., INC. THROUGH OMNIA PARTNERS, PUBLIC SECTOR FOR AN ANNUAL CUMULATIVE AMOUNT NOT TO EXCEED \$2,000,000.00; FOR A PERIOD OF ONE YEAR WITH THE OPTION TO RENEW UP TO FOUR ADDITIONAL ONE-YEAR TERMS

WHEREAS, Opportunity Home requires the services of a contractor to maintain, repair, and if required replace the commercial HVAC systems and the chiller and boiler systems at various Opportunity Home properties; and

WHEREAS, HUD encourages Housing Authorities to utilize cooperative and interagency agreements to simplify and expedite the procurement processes. Opportunity Home is not required to issue its own competitive solicitation in cases where the use of available contracts are appropriate and in accordance with Opportunity Home's procurement policies; and

WHEREAS, on June 15, 2022, Racine County Wisconsin, the lead agency for Omnia Partners issued IFB#RC2022-1001 to establish a national cooperative contract for HVAC Products, Installation, Labor Based Solutions, and Related Products and Services that closed on July 21, 2022. Racine County awarded Trane U.S. Inc. contract #3341 that is effective September 1, 2022 to August 31, 2027 with the option to renew for one (1) additional five (5) year period; and

WHEREAS, Opportunity Home is requesting approval to utilize the services under this awarded contract for a period of one year with the option to renew up to four additional one year terms; and

WHEREAS, the cost for HVAC products, installation, labor based solutions and related products and services is not expected to exceed an annual cumulative amount of \$2,000,000.00 and will be funded through the Capital Fund Program, approved operating budgets and/or available reserves.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of Opportunity Home San Antonio hereby:

- 1) Approves Resolution 6288, authorizing the award of a contract for HVAC Products, Installation, Labor Based Solutions and Related Products and Services to Trane U.S., Inc. through Omnia Partners, Public Sector for an annual cumulative amount not to exceed \$2,000,000.00; for a period of one year with the option to renew up to four additional one-year terms.

- 2) Authorizes the President and CEO or designee to execute all necessary documents and extensions.

Passed and approved the 2nd day of November 2022.

Ana M. "Cha" Guzman

Chair, Board of Commissioners

Attested and approved as to form:

Ed Hinojosa, Jr.

President and CEO

MEMORANDUM

To Operations and Real Estate Committee Meeting

From Ed Hinojosa, Jr., President and CEO

Presented by George Ayala, Director of Procurement

RE: Procurement Activity Report

DS
EHJ

CURRENT SOLICITATIONS:

There are currently two Invitations for Bids and two Request For Proposals advertising. The Invitation for Bids are for Fleet Vehicles - 2023 Models and Automatic Doors for Victoria Plaza. The Request For Proposals are for Interior/Exterior Design and Purchasing Management Services for Snowden Apartments and Intrusion Protection and Security Cameras for Multi-Level Properties.

CLOSED/PENDING SOLICITATIONS:

There are 4 solicitations that have closed and are currently being evaluated. The solicitations are for dumpster Enclosure at LC Rutledge, Central Office Lobby Renovations, Decals for Fleet Vehicles and Golf Carts, and Foundation Stabilization for Riverside Administration Building.

SOLICITATIONS IN DEVELOPMENT:

Procurement is currently working on a number of solicitations for advertisement. These include: Fair Market Rent Survey; Lincoln Heights Computer Lab Exterior Renovations; Turnkey WiFi Expansion for Snowden Apartments; Intrusion Protection and Security Cameras for Snowden Apartments; Parcel Lockers; Residential Real Estate Broker; Commercial Real Estate Broker; Affordable Home Construction Services; Interior/Exterior Signage for Snowden Apartments; Build San Antonio Green (BSAG) Professional Services; Audit of SAHA's Pension Plan; Administrator for SAHA's 457(b) Plan; Public Relations Consulting Services; Roof Replacement - Alazan Administration Building; Various Security Services; Debt Collection Services; Gate Security; Rental Comparability Study; Inspection, Evaluation, Repair, and/or Stabilization of Foundations; Unit Make Ready; and Underground Utility Locating Services.

CHANGE ORDERS:

Date	Contract	Contractor	Description
4/14/2022	Apricot 360 Bundle (CDI Case Management Software)	SHI Government Solutions	\$10,860.00; additional licenses
4/14/2022	Waste Disposal and Recycling Services	Waste Management	9.4% increase; vendor request
4/21/2022	Apricot 360 Bundle (CDI Case Management software)	SHI Government Solutions	\$6,115.10; standard market increase

Opportunity Home San Antonio**October 19, 2022**

5/9/2022	Foundation Repairs at Alazan Apache	Alamo HyTech Foundation	\$1,750.00; additional services
7/28/2022	Commissioning Services at Victoria Plaza	Group 14 Engineering	Contract extension; time only. No additional funds
8/15/2022	Resurfacing Services	EA Contractor	Increase; vendor request
8/18/2022	Various Security Services	Texas Lawman & Traffic Control Services	Extension and increase; vendor request
8/21/2022	Foundation Repair at William Sinkin	Alamo HyTech Foundation	\$1,300.00 increase; increase in the price of steel piers
8/26/2022	Automated and Manual Bulk Pick Up Services Agency Wide	Bulk-Away, LLC	10% increase; vendor request
9/1/2022	Automated and Manual Bulk Pick Up Services Agency Wide	Will-Luc Enterprises dba Junk King San Antonio	25% increase; vendor request
9/9/2022	Swimming Pool Water Quality Maintenance Equipment	Poolsure	25% increase; vendor request
9/21/2022	Development Initiative Consulting Services	Baker Tilly	City of San Antonio 2022 Bond and CBDG/Home Application Services \$20,000.00
9/28/2022	Google Workspace Enterprise Plus License	SADA Systems Inc.	Additional Licenses \$12,820.50

PROPOSED ACTION:

None at this time.

FINANCIAL IMPACT:

None at this time.

STRATEGIC OUTCOME:

Supports all strategic outcomes.

ATTACHMENTS:

Opportunity Home San Antonio

October 19, 2022

Procurement Activity Report
Business Categories

Procurement Activity Report as of October 4, 2022				
Solicitations Currently being Advertised				
SAHA Department	Type	Solicitation Name	Bidders Conference	Closes
Development Services	RFP	Interior/Exterior Design and Purchasing Management Services for Snowden Apartments	N/A	10/05/2022
Public Housing	RFP	Intrusion Protection and Security Cameras for Multi-Level Properties	N/A	10/20/2022
Agency Wide	IFB	Fleet Vehicles - 2023 Models	N/A	10/24/2022
Construction Services	IFB	Automatic Doors for Victoria Plaza	N/A	11/02/2022
Solicitations Under Evaluation				
SAHA Department	Type	Solicitation Name	Date Closed	October 19, 2022 Operations and Real Estate Committee Meeting and November 2, 2022 Regular Board Meeting
Agency Wide	RFP	Re-Certification Processing Services	8/16/2022	
Construction Services	Coop Award	Commercial HVAC	N/A	
Solicitations Under Evaluation				
Public Housing	QQ	Dumpster Enclosure at LC Rutledge	07/19/2022	Procurement Negotiations, Due Diligence, and Evaluation
Construction Services	IFB	Central Office Lobby Renovations	09/01/2022	
General Services	QQ	Decals for Fleet Vehicles and Golf Carts	09/29/2022	
Public Housing	IFB	Foundation Stabilization for Riverside Administration Building	09/30/2022	
Future Solicitations		Solicitation Name	Anticipated Month of Release	
Beacon Communities		Fair Market Rent Survey	October 2022	
Construction Services and Sustainability		Lincoln Heights Computer Lab Exterior Renovations	October 2022	
		Turnkey WiFi Expansion for Snowden Apartments	October 2022	
		Intrusion Protection and Security Cameras for Snowden Apartments	October 2022	
DSNR		Parcel Lockers	Department Hold	
		Residential Real Estate Broker	November 2022	
		Commercial Real Estate Broker	November 2022	
		Affordable Home Construction Services	November 2022	
		Interior/Exterior Signage for Snowden Apartments	November 2022	
		Build San Antonio Green (BSAG) Professional Services	November 2022	
Human Resources		Audit of SAHA's Pension Plan	Department Hold	
		Administrator for SAHA's 457(b) Plan	Department Hold	
Public Affairs		Public Relations Consulting Services	October 2022	
Public Housing		Roof Replacement - Alazan Administration Building	Coop Award	
Security		Various Security Services	October 2022	
Organization Wide		Debt Collection Services	Organization Hold	
		Gate Security	October 2022	
		Rent Comparability Study	October 2022	
		Inspection, Evaluation, Repair and/or Stabilization of Foundations	October 2022	
		Unit Make Ready	October 2022	
		Underground Utility Locating Services	October 2022	

Categories of Procurements

SAHA Department	Solicitation Name	Vendor	Amount	Date
Awards Under President and CEO Expanded Authority				
Beacon Communities	Foundation Stabilization for Beacon Communities	Straight Line Foundation Repair	\$133,110.00	09/8/2022
Human Resources	Electronic Enrollment Benefit Platform	Hodges-Mace, an Alight Company	\$50,000.00	09/9/2022
Agency Wide	Recertification Processing Services	Gilson Software Solutions dba Gilson Property Management Services and Nan McKay and Associates	\$250,000.00	09/13/2022
Agency Wide	Inspection, Service, and Replacement of Fire Extinguishers	Firetrol Protection Systems and Elastac Fire & Safety Products dba A&C Fire Equipment	\$250,000.00	09/20/2022
Construction Services	Blanco Cooling Tower	Geofill Material Technologies	\$250,000.00	09/20/2022
Legal	Legal Services	Steptoe & Johnson PLLC	\$250,000.00	09/21/2022
Agency Wide	Uniform Apparel, Custom Embroidery, and Imprinting Services	Bankson Group LTD dba Alamo Tees & Advertising and FirStop, LLC	\$250,000.00	09/21/2022
Awards Under Contracting Officer Authority				
Finance and Accounting	Arbitrage Rebate Calculation for Woodhill	Arbitrage Compliance Specialists	\$500.00	09/09/2022
General Services	Interior and Exterior Signs for Central Office	HWI Capital dba Sign-A-Rama	\$15,827.50	09/09/2022
Construction Services	Sign Package for Victoria Plaza	FirStop, LLC	\$9,755.00	09/09/2022
Public Housing	Make-Ready Unit 101 Riverside	BR General Contractors	\$34,225.08	09/09/2022
Public Housing	Make-Ready 5114 Stockman Drive	BR General Contractors	\$35,400.00	09/15/2022
Beacon Communities	49 Tablets and Otterbox Cases	Apex Wireless	\$15,189.02	09/20/2022
Innovative Technology	Live Vault Services	LMC Data Corporation	\$6,480.00	09/21/2022
Public Housing	Foundation Stabilization for Alazan & Lincoln Heights Apartments	Alamo Hy-Tech Foundation	\$14,400.00	09/27/2022
Public Housing	Power Washing for Fair Avenue Balconies	BR General Contractor	\$48,950.00	09/28/2022
IT Purchases (Resolution 6010 authorizing the use of Cooperative Purchasing Contracts and General Services Administration (GSA Federal Supply Schedules))				
Innovative Technology	Palo Alto Cortex	World Wide Technology	\$21,441.48	09/19/2022

				Est Closing							Income Mix							
Project Name	District	Developer	Financing	Date	TotalDevCost	Developer Fees	Tax Credit Equity	Tax Abatement	# Units	PH/PBV	30%	40%	50%	60%	70%	80%	Market	
Financing Closed (under Construction)																		
1604 Lofts	D2	NRP	4% Tax Credits & Bonds	Closed	\$56,663,651	\$6,158,000	\$17,072,192	\$1,201,269	324		33		0	224		67	0	
Aspire at Tampico*	D5	Mission DG	4% Tax Credits & Bonds	Closed	\$34,115,710	\$4,205,093	\$7,379,055	\$723,253	200		9	10	18	68	21	10	64	
Trader Flats (The Scott)	D4	NRP	4% Tax Credits & Bonds	Closed	\$55,753,169	\$5,847,000	\$16,984,301	\$1,181,967	324		33		0	224	67		0	
Culebra Crossing	D6	Lynd	HUD 221(d)(4)	Closed	\$50,123,889	\$250,000	\$0	\$1,062,626	327		0		0	0		164	163	
Kitty Hawk Flats	Converse	NRP	4% Tax Credits & Bonds	Closed	\$40,503,098	\$4,331,000	\$12,387,511	\$858,666	212		22		0	135	55		0	
Legacy at Alazan*	D5	NRP	9% Tax Credits	Closed	\$19,155,261	\$1,960,000	\$14,061,093	\$406,092	88	40				40		0	8	
100 Labor*	D1	Franklin	HUD 221(d)(4)	Closed	\$52,438,321	\$3,318,932	\$0	\$1,111,692	213		27		17	0		0	169	
Watson Road (Frontera Crossing Apartments)	D4	NRP	4% Tax Credits & Bonds	Closed	\$60,567,278	\$6,803,000	\$24,735,526	\$1,284,026	348			18	18	294	18	0	0	
Copernicus (Seven07 Lofts)	D2	NRP	4% Tax Credits & Bonds	Closed	\$55,389,378	\$6,009,000	\$22,199,005	\$1,174,255	318			17	17	267	17	0	0	
Vista at Interpark	D9	Atlantic Pacific Comm.	9% Tax Credits	Closed	\$17,554,339	\$1,827,570	\$13,948,605	\$372,152	64		7		16	41				
Vista at Everest	D1	Atlantic Pacific Comm.	9% Tax Credits	Closed	\$18,109,812	\$1,823,814	\$13,948,605	\$383,928	64		7		16	41				
Bristol at Somerset	D4	Louis Poppoon Development Consulting	4% Tax Credit & Bonds	Closed	\$63,331,807	\$7,500,000	\$25,552,709	\$1,342,634	348		0	0	0	348	0	0	0	
Horizon Pointe	D2	Integrated Realty Group	4% Tax Credits & Bonds	Closed	\$65,639,352	\$7,498,298	\$25,025,832	\$1,391,554	312		20	35	106	0	151	0	0	
Josephine	D1	Lynd	Conventional Loan	Closed	\$68,463,888	\$250,000	\$0	\$1,451,434	259		0		0	26		104	129	
Palo Alto	D4	Streamline	4% Tax Credits & Bonds	Closed	\$67,848,057	\$7,562,045	\$24,188,411	\$1,438,379	336		16	16	32	244	28			
Potranco	D4	Lynd	Conventional Loan	Closed	\$67,914,812	\$250,000	\$0	\$1,439,794	360		0		0	36		144	180	
Snowden Road*	D7	SAHA	9% Tax Credits	Pending	\$34,700,554	\$2,599,000	\$13,948,605	\$735,652	135	54	14		26	41				
Total					\$828,272,376	\$68,192,752	\$231,431,450	\$17,559,374	4232	94	188	96	266	2029	357	489	713	
Board Has Approved																		
Board Provided Final Approval																		
The Sorento # (resyndication of tax credits)	D7	Fairfield Residential	4% Tax Credits & Bonds	acquisition closed (tax credits resyndication closed 6/21/22)	\$41,061,812	\$1,521,984	\$22,474,000	TBD	248	0	38	0	0	210	0	0	0	
Bethel Place # (resyndication of tax credits)	D6	Fairfield Residential	4% Tax Credits & Bonds	acquisition closed (tax credits resyndication closed 6/24/22)	\$42,812,000	\$1,824,099	\$25,787,962	TBD	250	0	38	0	0	212	0	0	0	
Rosemont at University Park (resyndication of tax credits)	D4	Roers Companies	4% Tax Credits & Bonds	acquisition closing estimated 7/31/22	TBD	TBD	TBD	TBD	240	0	36	0	0	294	0	0	0	
Costa Almadena (resyndication of tax credits)	D3	DEVCO	4% Tax Credits & Bonds	acquisition closed (tax credits pending)	TBD	TBD	TBD	TBD	176	0	27	0	0	149	0	0	0	
Tigoni Villas (resyndication of tax credits)	D7	DEVCO	4% Tax Credits & Bonds	acquisition closed (tax credits pending)	TBD	N/A issuance of bonds only	TBD	N/A	140	0	22	12	22	84	0	0	0	
The Ravello (purchase of limited partnership interest)	D3	SAHA will own 100% of partnership	N/A	11/1/22	N/A	N/A	N/A	TBD	252	0	0	0	0	252	0	0	0	
San Juan II (purchase of limited partnership interest)	D5	SAHA will own 100% of partnership	N/A	5/25/22	N/A	N/A	N/A	TBD	144	48	15	0	0	123	0	0	6	
Total					\$83,873,812	\$3,346,083	\$48,261,962	\$1,778,125	1450	48	176	12	22	1324	0	0	6	
Board Approved Bond Inducement																		
Artisan at Springview*	D2	Franklin	4% Tax Credits & Bonds	Pending	\$64,001,571	\$7,044,312	\$25,074,843 ^\$2,014,960	\$1,356,833	325	65	0		8	181	53	18	0	
Victoria Commons - North Pond*	D1	Catellus	TBD	Pending	TBD	TBD	TBD	TBD	TBD		TBD		TBD	TBD		TBD	TBD	
Total					\$64,001,571	\$7,044,312	\$27,089,803	\$1,356,833	325	65	0	0	8	181	53	18	0	
Board Approved the Developer																		
Victoria Commons - South Pond*	D1	Catellus	TBD	Pending	TBD	TBD	TBD	TBD	TBD		TBD		TBD	TBD		TBD	TBD	
Victoria Commons - Townhomes*	D1	Catellus	TBD	Pending	TBD	TBD	TBD	TBD	TBD		TBD		TBD	TBD		TBD	TBD	
Fiesta Trails	D8	NRP	9% Tax Credits	Pending	\$19,723,244	\$1,884,000	\$13,423,658	\$418,133	60		6		24	30				
Vista at Silver Oaks		Atlantic Pacific Comm.	9% Tax Credits	Pending	\$24,183,539	\$2,307,314	\$18,398,160	\$512,691	76	0	8	0	23	45	0	0	0	
Total					\$43,906,783	\$4,191,314	\$31,821,818	\$930,824	136	0	14	0	47	75	0	0	0	
Pending Board Consideration																		
Alazan Courts*	D5	TBD	TBD	Pending Board Consideration	TBD	TBD	TBD	TBD										
Total					\$0	\$0	\$0	\$0	0	0	0	0	0	0	0	0	0	
Grand Total					\$1,020,054,542	\$82,774,461	\$338,605,033	\$21,625,156	6,143	207	378	108	343	3,609	410	507	719	

*SAHA owned land

^ Historical Tax Credits

Total development cost = acquisition price plus rehab soft and hard costs