

# PENROSE

We Bring It All Together

November 17, 2014

Contracting Officer  
Philadelphia Housing Authority  
3100 Penrose Ferry Road  
Philadelphia, PA 19145

**Re: Unit Based Operating Subsidy RFP  
RFP No. P-004440**

Dear Sir/Madam,

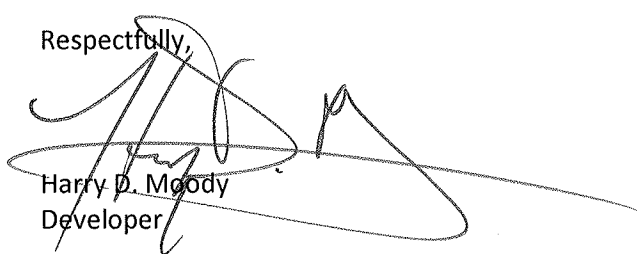
On behalf of the Wynnefield-Overbrook Revitalization Corporation (WORC) and Penrose Properties LLC, I am pleased to submit a response to the Unit based Operating Subsidy RFP. Enclosed you will find one (1) original and seven (7) copies of our response to the RFP.

WORC and Penrose are seeking operating subsidy for five (5) public housing units in conjunction with the development of the Wynne Senior residences; a low income, 50 unit senior development located in the Wynnefield section of West Philadelphia. In addition to seeking this funding from the PHA, the development team is also seeking city of Philadelphia CDBG funds as well as Tax credits in the upcoming tax credit round with PHFA.

The contents of our response should clearly articulate the information that has been requested in your RFP. If you have any questions, regarding this proposal, please feel free to contact me at 267-386-8664 or [hmoody@penrose.com](mailto:hmoody@penrose.com).

Thank you in advance for your consideration of our proposal.

Respectfully,



Harry D. Moody  
Developer



Tab 1. Narrative Description of the Project



## **Wynne Senior Residences Senior Apartments Project description**

### **History**

The Wynne Theater is a Philadelphia landmark located in the Wynnefield section of West Philadelphia. Over the years this prominent building has fallen into disrepair and has suffered the effects of exposure to the elements, leading to deterioration and vandalism. The building has lost most if not all of its historic integrity and structural stability. To that end, this once vibrant entertainment venue has become an eyesore, and in many respects, a danger to the community. Pennrose Development, in partnership with the Wynnefield-Overbrook Revitalization Corp. (WORC), is proposing to build a 50 unit Senior Residence on the site, preserving the cultural and architectural heritage of the original Wynne Theater through the construction of a new building.

### **Site Control**

The Philadelphia Redevelopment Authority (PRA) currently owns the property. The PRA, via a competitive RFP, awarded the Pennrose/Wynnefield-Overbrook Revitalization Corp Development Team a property reservation for this site in anticipation of the team pursuing additional City funding, Low income Housing Tax Credits and other Public and Private sources of financing to support the development costs of the Project.

### **The Project**

The Project will be located at 2001-11 N. 54<sup>th</sup> Street Philadelphia, Pa 19131. This is located in the 4<sup>th</sup> Councilmanic District (Councilman Curtis Jones Jr.) 19<sup>th</sup> Police District and 2<sup>nd</sup> US Congressional District. The Census tract is 119.

The Project is proposed to be a newly constructed four (4) Story, 50 unit Senior Residence comprised of forty-five (45) one bedroom units and five (5) two bedroom units. The Project will be affordable to seniors sixty-two (62) or older and up to 60% of the Area Median Income (AMI).

10% of the units will be reserved for residents at or below 20% of the Area Median income. These units (5) will be designated as ACC units. The operating pro forma takes into account the reduced rents associated with the lower income tiers. The project operates effectively with the rents indicated; however the Development Team continues to actively seek opportunities to subsidize rents for residents with various agencies.

## **Ownership Structure**

A Single Purpose entity, Wynne Senior Residences LP, has been formed to serve as the development entity for the project. Pennrose GP, LLC will be the general partner and Pennrose Development LLC will be the Developer. WORC will serve as a development consultant and Community liaison. In addition the WORC organization will serve as the non-profit partner Class B member owning .005% of the partnership.

## **Financing**

The Project will be submitted to PHFA for consideration of an allocation of Tax Credits in January of 2015. Tax credit equity is expected to be the primary sources of funding of the project, expecting to generate \$11,756,472 from the PHFA allocation. In addition to Tax Credit equity, the project will respond to the City of Philadelphia's Affordable Housing RFP and will request \$2,000,000 in CDBG funding. Councilman Curtis Jones' office has also committed \$100,000 in NTI funds to support the development. The Developer will address the gap in financing by contributing up to \$519,317 in deferred developer fee to make the project financially feasible. The capital stack is as follows:

LIHTC	11,756,472
City of Phila CDBG	2,000,000
NTI Funds	100,000
Deferred Developer Fee	<u>519,317</u>
<b>Total</b>	<b>14,375,789</b>

## **Zoning**

The project was previously zoned CMX-2 for the Head House and RSA -05 for the remaining lot. To date the Project has obtained RMX-3 zoning, which is the best option for the proposed use of this facility.

## **Building Construction and Systems**

The existing building will be demolished. However, the design of the new facility will honor the history of the iconic building it is replacing. It will restore some of the prominent features of the previous building and display similar architecture that reminds neighbors of the buildings history while integrating the building into the existing community.

The building will include some commercial space that will help to anchor the economic development being spurred by the WORC organization along the 54<sup>th</sup> street commercial corridor as well as provide opportunities for neighbors to socialize and support new businesses.

The construction of this new senior residence will consist of concrete footings and CMU foundations, concrete slab-on-grade, 2x6 wood stud exterior walls and prefabricated open-web wood floor trusses and roof trusses. The exterior walls will be finished with a face brick that varies in height, and fiber cement

siding above the brick. The roofing will be an EPDM membrane at the flat porch areas with architectural grade roof shingles on the pitched roofs. Aluminum sliding doors at the main entrance and energy-efficient, vinyl single-hung windows are specified. The exterior walls will contain R-19 batt insulation, with R-10 rigid insulation at the foundation/slab and R-38 insulation in the attic spaces, and the building envelope will be sealed per the Energy & Environmental Building Association's (EEBA) details to achieve a minimum HERS rating of 86 and meet Energy Star standards. The building will have Energy Star labeled residential appliances, light fixtures and equipment wherever possible, with low-flow plumbing fixtures to conserve water.

### **Project Amenities**

The new residence will contain approximately of area on four floors. There will be forty-five (45), one-bed/one-bath rental apartments, comprising 700 s.f. of living space and five (5), two-bed/one-bath rental apartments, comprising 950 s.f. of living space. Various common areas throughout the building create opportunities for social, wellness, and recreational activities. First floor amenities will include a large community room with kitchenette, lounge and retail space. Common laundry facilities will be on the second floor, a wellness center will occupy the third floor, and a library/computer lounge will be on the top floor. Two elevators service each floor, with a spacious Elevator Lobby/Lounge. Outdoor amenities include a generous patio and private yard that are directly accessible from the first floor lounge.

### **Apartments**

Each apartment will have full bedrooms, a living/dining room, full-size kitchen and bathroom, and ample closet space (coat, linen, hallway and bedroom). Two large windows will offer ventilation and natural light in each living and bedroom. The bedrooms are sized to accommodate resident furnishings, with adequate space for circulation and storage. The kitchens are designed with a top-mount refrigerator, self-cleaning electric range with front controls, vented range hood with wall switch, stainless steel sink with single lever faucet, dishwasher, garbage disposal and a wide pass-through shelf that is open to the dining area. The bathrooms will have a full-size bathtub or shower, cultured marble lavatories with vanity base cabinets, medicine cabinets and toilets. All units will be intentionally designed with special consideration for functionality and usability for senior residents. These include lower wall cabinets in the kitchens, wire pulls on all cabinet doors and drawers, full grab bars at all toilets and bathtubs/showers, higher toilets, and hand-held shower sprayers.

Electric service to each unit will be individually metered and controlled with wall-mounted thermostats with large, easy to read numbers. The heating and cooling system will be employ electric heat pumps and individual gas water heaters. Appliances, HVAC equipment and light fixtures will be Energy Star labeled whenever possible. Each unit will have CAT5e wiring for telephone, data, and digital cable television service. All units will contain an emergency-call pull cord in the bedrooms and bathroom to "alert" the management if a resident is in need of assistance.

### **Market Study**

McHale and Associates are preparing a market study for both the residential portion of this project. A copy of the market study is included in this response in tab 4. While providing necessary information regarding the residential component as required by relevant funding agencies, lenders, etc., it will also provide pertinent information as to the highest and best use for the commercial component while identifying the community needs.

### **Accessibility and Visitability**

A minimum of 10% units (5) will be fully wheelchair accessible, and all remaining apartments will be handicap *adaptable* with many accessible features. In addition to the standard features listed above, all fully accessible-units will include a lowered work and sink counter with open knee-space in the kitchens, a full-size roll-in shower with portable shower seat, cultured marble wheelchair-accessible lavatory, and a wall-mounted skirt in the bathrooms. Five (5) apartments will be equipped with devices for hearing and visually impaired residents. All apartments and common areas in the new residence and the outdoor amenity spaces will be fully visitable by friends, family and staff.

### **Energy Conservation & Green Building Criteria**

The Wynne Senior Residences project team, with its extensive experience in providing the highest industry standard, has implemented goals to achieve sustainable needs as well as urban design concepts without compromising the ability of future generations to meet their own needs. The green building measures that reduce energy needs that The Wynne Senior Residences will reference are as follows:

The overall U-value of the exterior building envelope will exceed the requirements of the 2009 International Energy Conservation Code for residential buildings (regardless of the number of stories) by at least 10%, as verified by a REScheck certificate. Air sealing of the exterior building envelope and attic plane shall be included. (Trade-offs available in the REScheck software for mechanical equipment will not be allowed.)

All appliances, mechanical equipment, windows, ceiling and exhaust fans, and exit signs, will be Energy Star® labeled when such equipment and appliances exist. (Exception: programmable thermostats do not need to be provided.) In addition, 100% of the permanent room light fixtures in the dwelling units will be equipped with compact fluorescent or LED bulbs and 100% of the community room and common area corridor and stair lighting will be fluorescent with electronic ballasts or will utilize compact fluorescent or LED bulbs.

The development will meet Energy Star® Standards by achieving a Home Energy Rating System (HERS) index necessary to achieve an Energy Star® rating. This will include computing a HERS score based on a review of the drawings and specifications prior to construction; blower door testing, a thermal bypass checklist inspection during construction; and HVAC design in accordance with ACCA Manuals D, J, N, Q, and S. The referenced development will promote energy efficiency and conservation, operational savings

Pennrose Development, LLC/Wynnefield-Overbrook Revitalization Corp

and sustainable building practices by conforming to the "Threshold Green Building Criteria" which follows.

### **Threshold Green Building Criteria**

1. Water saving plumbing fixtures in compliance with the EPA WaterSense program shall be installed throughout the development with the following maximum flow rates: Showerheads: 2.0 gpm, Bathroom Faucets: 1.5 gpm, Toilets: 1.28 gpf. In addition, kitchen faucets shall be 2.0 gpm maximum.
2. Landscape plantings shall be drought-tolerant and will not need irrigation.
3. Provisions for a development wide recycling program shall be provided.
4. Photocells shall be provided to control all site lighting.
5. All paints, primers and clear finishes used shall be low volatile organic compound (VOC) type in accordance with Green Seal Standard GS-11 for interior paint, GC-03 for anti-corrosive paint, and South Coast Air Quality Management District (SCAQMD) Rule #1113 for clear wood finishes and stains.
6. All caulking, sealants and adhesives shall be low VOC type in accordance with SCAQMD Rule #1168.
7. Composite woods used indoors shall be free of urea formaldehyde or shall be sealed with a durable low VOC sealer that complies with SCAQMD Rule #1113. Cabinetry with KCMA Environmental Stewardship Program (ESP) certification shall be deemed to satisfy this requirement.
8. Carpets shall bear the Carpet and Rug Institute "Green Label" or shall be manufactured from at least 25% recycled materials. Bathroom fans shall be Energy Star® labeled and in accordance with ASHRAE 62.2. (For preservation developments, the installation of switch-mounted timers will satisfy these criteria.)
9. Bathroom and Kitchen fans and clothes dryers shall be vented directly to the outdoors.
10. Mechanical ventilation in accordance with ASHRAE 62.2 shall be provided.
11. Heating, ventilation and air-conditioning systems shall be engineered and properly sized for the space covered in accordance with ACCA Manuals J and N, as applicable. A mechanical engineer will certify to the design by sealing the construction documents.
12. No piping shall be located outside of the interior finish of the insulated building envelope. All domestic water pipes except for PEX piping shall be insulated.
13. No mold-propagating materials shall be used in damp areas. Only moisture resistant materials shall be used in bathrooms and at tub-shower surrounds.
14. Vapor barriers shall be provided for all interior slabs on grade.
15. All below grade spaces shall be waterproofed and have foundation drainage.

16. Passive radon mitigation systems shall be installed in areas designated as EPA Radon Zone 1 and 2. The lowest level containing dwelling units or community space must be tested for radon in all buildings prior to occupancy. Test results above the action level will require that an active radon mitigation system be installed that result in satisfactory test results.
17. Grading at perimeter of the building shall provide positive drainage away from the building.
18. Units with garages shall have a carbon monoxide sensor controlled exhaust fan and the demising wall between the garage and living space shall be a continuous air barrier.
19. Termite shields or borate based wood treatment shall be provided with low VOC caulking at all floor joints and penetrations to prevent insect infestation. Chemical soil treatment or bait stations shall not be used.
20. Lead safe work practices shall be used in all properties built before 1978.
21. The Owner shall be provided with a maintenance & operations manual and training including all materials, systems and equipment used in the construction, explaining the Green Building components and amenities, how they benefit the property, and how to properly maintain them.
22. A Green Building Guide and orientation shall be provided to the residents explaining the Green Building components and amenities and how they benefit from them.

## Tab 2. Community Resources

This Section includes;

- A list of resources close to the project including a map identifying locations
- Transportation data
- Letter from the Philadelphia Planning Commission supporting the project and indicating the project alignment with the West Park Plan.
- Inclusion in NTI
- Job Center Data

Wynnefield Academy (Private)  
Woodbine Academy (Private)  
Saint Rose Lima Catholic School (Private)

**Supporting Facilities**

There are various supporting uses within the area. The following table identifies the subject's proximity to other nearby positive land uses.

Name	Facility	Address	Distance
Playgrounds	Tustin Recreation Center	6006 W. Columbia Ave.	0.6 mi.
Parks	Fairmount Park	N. Parkside Ave.	0.4 mi.
Fitness Center	I Am Fitness	4950 Wynnefield Ave.	0.5 mi.
Supermarket	Acme	121 E. City Ave.	1.5 mi.
Shopping	Target	4000 Monument Rd.	1.7 mi.
Library	Free Library of Phila	N. 52 <sup>nd</sup> & Media St.	0.8 mi.
Library	Free Library of Phila	5325 Overbrook Ave.	0.6 mi.
Public Health Centers	Pcom Geriatric Center	4190 City Ave.	1.4 mi.
Senior Center	Philadelphia Senior Center (Main Branch)	509 South Broad Street	4.5 mi.
Senior Center	Golden Slipper Center for Seniors	3901 Conshohocken Ave.	1.7 mi.
University	Saint Joseph's	City Ave.	0.6 mi.
Public Schools (Major)	Overbrook High School	5898 Lancaster Ave.	0.5 mi.
Hospital	Christ Church Hospital	2100 N. 49 <sup>th</sup> St.	0.6 mi.
Hospital	Lankenau Hospital	100 E. Lancaster Ave.	1.5 mi.
Municipal Building	City Hall	Broad and Market Streets	4.4 mi.
Police Station	Wynnefield Neighborhood	2201 Belmont Ave.	0.9 mi.
Bus Stops		54 <sup>th</sup> & Berks Streets	0.1 mi
Train Station	SEPTA – Cynwyd Line	Wynnefield Avenue	0.4 mi.
400overbrooFood Store	Frank & Franks Grocery Store	1903 N. 54 <sup>th</sup> Street	0.4 mi.
Food Store	Produce Junction	2241 Bryn Mawr Ave.	0.4 mi.
Pharmacy	Wynnefield Pharmacy	1901 N. 54 <sup>th</sup> St.	0.1 mi
Pharmacy	Overbrook Pharmacy	5610 Lancaster Ave.	0.5 mi



**J. McHale & Associates, Inc.**

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Religious (Church)	Pinn Memorial Baptist Church	5398 Wynnefield Ave.	0.3 mi
Religious (Church)	St. Barbara's Church	5359 Lebanon Ave.	0.1 mi.
Misc.	Bala Theater	157 Bala Ave.	1.2 mi.
Misc.	Dunkin Donuts	1501 N. 52 <sup>nd</sup> St.	0.7 mi.
Misc.	Family Dollar	5648 Lancaster Ave.	0.5 mi.
The Shoppes at 54 <sup>th</sup> St.	Pete's Pizza Hong Kong Restaurant Morgan's Fruits & Vegetables	54 <sup>th</sup> and Arlington Sts.	0.1 mi.

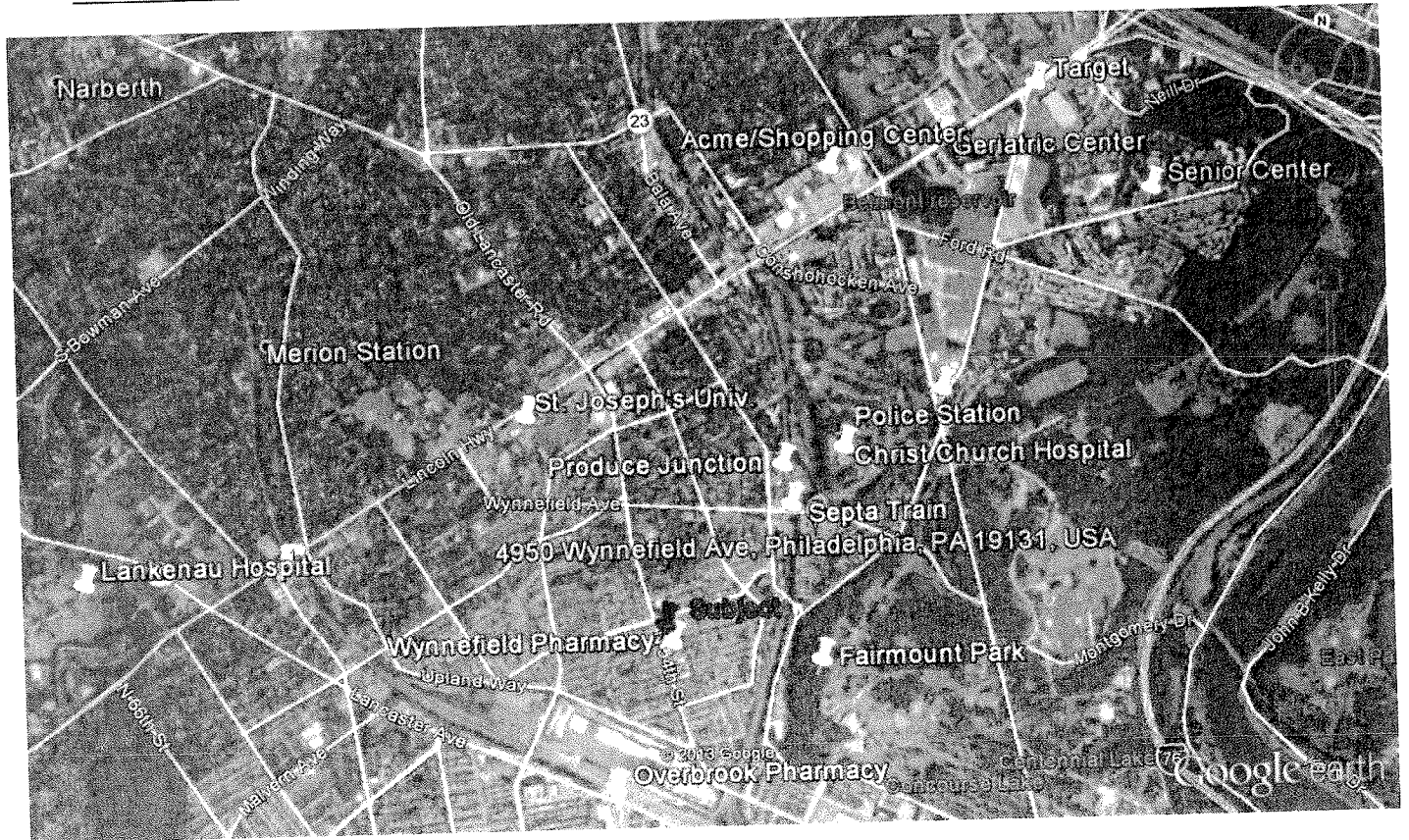
In addition to the aforementioned supporting uses within the area, seniors are provided additional support through the Philadelphia Corporation for Aging (PCA). The PCA contracts with other community organizations to provide a number of services for older people or people with disabilities including senior centers, care at home services, legal assistance, transportation and home delivered meals. The following table identifies some of the programs provided to seniors in the area:

<p><b>Emergency Resources</b>          --- Programs available include crime victims assistance, providing financial and emotional support, food assistance including food cupboards, food banks and low income government assistance, homeless shelters and utility assistance.</p> <p><b>Home Based Care</b>          --- Services to support a person's ability to remain at home include home delivered meals, personal care, nursing care, companionship, physical and occupational therapy, home modifications, transportation and adult day services.</p> <p><b>Protective Services</b>          --- The Older Adult Protective Services Department provides resources to intervene in cases of abuse, abandonment, neglect or financial exploitation.</p> <p><b>Behavioral and Mental Health Services</b>          --- Variety of services including an outreach and assessment program, outpatient counseling, in-home behavioral health care, and memory disorder assessment centers.</p> <p><b>Adult Day Services</b>          --- Non-residential facilities for those who cannot remain safely at home or are isolated at home. Typically includes personal care, recreational activities, counseling and social services, medical support and transportation.</p> <p><b>Legal Issues</b>          --- Three legal agencies are contracted through the Philadelphia Corporation for Aging to provide legal services for individuals over 60.</p> <p><b>Insurance and Benefits</b>          --- Counseling is available through the APPRISE program to answer questions about insurance and benefits.</p> <p><b>Transportation</b>          --- Various discount and benefit programs include free rides and fare discounts on public transportation, medical transportation, special services for those unable to use public transportation and insurance discounts.</p>
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**J. McHale & Associates, Inc.**

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The following maps illustrate local public schools, universities, hospitals, police offices, and fire stations.



## Transportation Data

The region is served by an extensive network of highways and bridges which provide good access to most portions of Pennsylvania, New Jersey and the eastern seaboard. Major highways throughout the County include Interstate 95, the Pennsylvania, Interstate 676 & 76 (*the Schuylkill Expressway*), US Route 1 (*Roosevelt Boulevard*) & 13, State Routes 30, 611, & 232.

Freight rail service has been available throughout the region since the last century and commuter train service is available via the Septa and PATCO High-Speed services. This commuter rail service is currently available throughout most portions of the County. Public bus service is available throughout the County and region. Major air service is available at the Philadelphia International Airport within a 10-minute drive of most portions of the County.

Overall, the subject is located in a reasonably desirable residential neighborhood in close proximity to the downtown Center City district of Philadelphia. The surrounding neighborhood offers a number of employment opportunities and commercial uses. Residences and commercial buildings in the neighborhood are typically in average condition. The city has demonstrated some signs of renewal, with positive factors include the following:

- ✦ Independence Mall revitalization (Liberty Bell and Independence Hall)
- ✦ SugarHouse Casino opened along the Delaware River in September 2010. The first phase of the project includes the casino floor, retail and dining space and a parking garage. Future phases of the project include a 500 room hotel, 30,000 SF event center and expanded retail and dining facilities.
- ✦ Foxwood Casino has partnered with Harrah's Entertainment to develop their long delayed casino project in the City.
- ✦ 10 Rittenhouse, a 135-unit luxury building opened in late 2009. The 33 story, \$300 million project features one, two and three bedroom homes with a fitness center, lap pool, outdoor terraces and gardens and a private parking garage and valet services.
- ✦ 1706 Rittenhouse opened May 2010. This luxury high-rise condominium building houses one residence priced beginning at \$4 million. The building was half sold out before construction was completed.
- ✦ A 54-unit, \$10.5 million renovation of an apartment building in the Tioga section of the City. The project was developed by Project HOME, a nonprofit group that caters to helping the homeless. Of the units, 15 will be set aside for homeless veterans, 14 for low income applicants, and 25 for homeless adults successfully managing mental illness or substance abuse problems.
- ✦ The City of Philadelphia's Neighborhood Stabilization Program tams the City with developers to acquire foreclosed properties, renovate them and sell them to new occupants.
- ✦ Construction of Dilworth Plaza, which sits above the intersection of SEPTA's Market-Frankford elevated line and Broad Street subway and Subway-Surface Trolley

lines. The project will create a pedestrian friendly public space, and will include a café, winter ice-skating and room for outdoor concerts and events. Construction is estimated to create more than 1,000 jobs.

- ✦ The Pennsylvania Convention Center expansion is completed and has increased the meeting and exhibit space by almost 60%.
- ✦ The Drexel Convenient Care Center opened in early 2010 in Center City. The walk in center provides basic medical care and is geared toward busy working professionals, residents and visitors.
- ✦ Employment districts within close proximity and easily accessible via public transportation.
- ✦ Thomas Jefferson University Hospital is undergoing a \$60 million expansion project including a new 11-story building on Walnut Street, the renovation of the adjacent building housing their outpatient neurological care and the construction of a bridge connecting the new building to their building across Walnut Street. They are also in the planning stages of a new 240,000 SF ambulatory-care center.
- ✦ The City is adding more tourist attractions with the planned openings of the National Museum of American Jewish History (November 2010), the President's House on Independence Mall (December 2010) and the Barnes Foundation on the Benjamin Franklin Parkway (2011).
- ✦ The Hotel Palomar opened in 2009 in Rittenhouse Square. The hotel features 235 rooms and received LEED (Leadership in Energy and Environmental Design) certification from the U.S. Green Building Council.
- ✦ Construction is underway in the Northern Liberties Section of the City on The Shops at Schmidts, a 100,000 SF, 2-story supermarket anchored retail structure with 160 parking spaces. The Residences at Schmidts is also planned, featuring three buildings with 600 new residential units surrounding a one acre park. These are the final phases of Town Investments project that includes the Piazza at Schmidts.
- ✦ Brandywine Realty Trust is planning the construction of Cira Center South. The property will include two towers featuring 23 floors of office space, a 250 unit hotel, 150 residential rental units, 50 residential condominiums, 20,000 SF of restaurant and retail space, and a 2,400 car parking garage. Phase the garage is under construction while the office and residential towers are planned for 2012.
- ✦ \$118 million conversion of Terminal B & C at the Philadelphia International Airport. It includes 45,000 SF retail gallery, 5,000 foot commuter runway, 500 foot ticket pavilion and 750 foot baggage claim facility.

PHILADELPHIA CITY PLANNING COMMISSION



November 14, 2014

Holly Glauser  
Director of Development  
Pennsylvania Housing Finance Agency  
P.O. Box 8029  
Harrisburg, PA 17105-8029

Gary J. Jastrzab  
Executive Director

Alan Greenberger FAIA  
Chair

Joseph Szymiel  
Vice-Chair

Rob Durov  
Patrick Eiding  
Bernard Lee, Esq.  
Elizabeth K. Miller  
Richard Negrin  
Nilda Iris Ruiz, MBA  
Nancy Roge, Trainer, FAIA, AICP

**RE: LIHTC Application for Wynne Senior Residences  
Arlington and North 54<sup>th</sup> Streets, Philadelphia PA  
Consistency with Community Plans**

Dear Ms. Glauser:

It is my understanding that Pennrose Properties is submitting an application to PHFA for Low Income Housing Tax Credits to help fund the construction of new rental housing for senior citizens, known as Wynne Senior Residences (the "Project"). Located at the northeast corner of North 54<sup>th</sup> Street and Arlington Street in the Wynnefield neighborhood, the project involves the new construction of a four-story building with 50 units of affordable housing for seniors, and ground floor retail use on a site currently occupied by the former Wynne Theater. The theater has been vacant since 1993, and the existing zoning is CMX-3.

This proposal is consistent with the *Philadelphia2035* Citywide Vision and the West Park District Plan, adopted by the City Planning Commission.

According to a preliminary review of the project by the Philadelphia Department of Licenses and Inspections ("L&I") under CMX-3 zoning requirements, the proposals would not require any special exception or variance relief, and would be an "as-of-right" project under CMX-3 zoning.

Please do not hesitate to contact me if you have any questions regarding these findings, or if I can be of further assistance.

Sincerely,

Gary J. Jastrzab  
Executive Director

cc: John Haak, PCPC  
Brian Wenrich, PCPC

One Parkway Building  
1515 Arch St  
13<sup>th</sup> Floor  
Philadelphia, PA 19102

215-686-4716 Telephone  
215-686-2630 Fax/Email

[www.phila.gov/pcplanning](http://www.phila.gov/pcplanning)

The West Park Plan, which has been referenced in this response as well as in the letter for the Philadelphia City Planning Commission can be accessed on the internet via the link below. Specifically, the Housing section starts on page 34 of the plan.

<http://phila2035.org/home-page/district/west-park/>

## Tab 2

The project is subject to funding from the NTI program. This is evidenced by the commitment of NTI funds provided by Councilman Curtis Jones Jr. While the program has technically expired the project is still eligible to benefit from remaining resources in this program. Commitment letters from the Councilman committing NTI funds to the project can be found in Tab 11 of this RFP.



610-660-1256

- Gary Jastzrab, Community Planning  
Philadelphia City Planning Commission  
215-683-4615
  
- Wanda Staples  
Wynnefield Residence Association  
215-878-0571

All of the above individuals or organizations were very supportive of the subject's proposed project, especially since the project proposes new units of more modern housing with good overall appeal. I am unaware of any opposition to the project.

7. **Analyze the suitability of the site for the subject development including accessibility to employment and services and its compatibility with surrounding uses, including economic benefits to the area and/or the proposed residents.**

### **Analysis of Subject's Site**

#### **Employment Data**

The entire region's economy is largely dependent upon City of Philadelphia and is part of the Philadelphia metropolitan area. The region offers many diversified employment opportunities for residents in services, high-tech, and other areas. The largest employers within the county are distributed as follows:

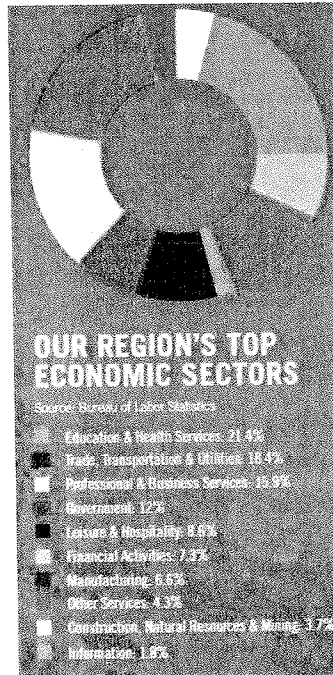
<b>Philadelphia County's Largest Employers</b>	
<b>Industry</b>	<b>Total Employed</b>
School District of Philadelphia	26,000+/-
Jefferson Health Systems	19,100+/-
University of Pennsylvania	16,160+/-
University of Pennsylvania Health System	14,941+/-
UPS	10,261+/-
Comcast/Spectacor	10,200+/-
Aramark Corp.	10,026+/-
Children's Hospital of Philadelphia	9,800+/-
SEPTA	8,800+/-
Temple University	7,804+/-
Temple University Health System	7,500+/-
U.S. Airways	6,247+/-
Independence Blue Cross	5,230+/-

**Employment Data**

The entire region's economy is largely dependent upon City of Philadelphia and is part of the Philadelphia metropolitan area. The region offers many diversified employment opportunities for residents in services, high-tech, and other areas. The largest employers within the county are distributed as follows:

<b>Philadelphia County's Largest Employers</b>	
<b>Industry</b>	<b>Total Employed</b>
School District of Philadelphia	26,000+/-
Jefferson Health Systems	19,100+/-
University of Pennsylvania	16,160+/-
University of Pennsylvania Health System	14,941+/-
UPS	10,261+/-
Comcast/Spectacor	10,200+/-
Aramark Corp.	10,026+/-
Children's Hospital of Philadelphia	9,800+/-
SEPTA	8,800+/-
Temple University	7,804+/-
Temple University Health System	7,500+/-
U.S. Airways	6,247+/-
Independence Blue Cross	5,230+/-
Drexel University	5,122+/-

Source: *SelectGreaterPhiladelphia.com*



The largest industries in terms of employment are education, health care, and transportation. The Health Care and Social Assistance Industry includes the most significant employment in the region. The table below, from the DVRPC indicates that the County of Philadelphia should anticipate a 3% increase in employment from the year 2010 to 2020.

*Table 1: Employment Forecasts 2000 to 2030*

County	2000	2005	2010	2015	2020	2025	2030	Absolute Change 2000-2030	Percent Change 2000-2030
Bucks	267,124	274,603	292,453	307,075	320,280	335,973	352,772	85,648	32.1%
Chester	238,641	248,187	270,523	289,731	305,086	324,002	345,062	106,421	44.6%
Delaware	238,164	242,213	251,901	258,958	265,787	269,370	273,411	35,247	14.8%
Montgomery	492,677	504,009	531,225	547,162	563,029	579,920	597,300	104,623	21.2%
Philadelphia	741,397	726,569	726,295	733,458	748,136	755,621	763,176	21,779	2.9%
<b>5-County PA Total</b>	<b>1,978,003</b>	<b>1,995,581</b>	<b>2,072,307</b>	<b>2,136,394</b>	<b>2,202,319</b>	<b>2,264,886</b>	<b>2,331,721</b>	<b>353,718</b>	<b>17.9%</b>
Burlington	202,535	207,598	216,940	223,862	230,375	240,051	249,653	47,118	23.3%
Camden	216,931	217,083	220,339	226,509	230,586	233,122	235,453	18,522	8.5%
Gloucester	99,467	104,142	114,452	119,124	123,485	129,168	135,627	36,160	36.4%
Mercer	209,758	214,833	226,901	237,743	244,876	253,066	258,818	49,060	23.4%
<b>4-County NJ Total</b>	<b>728,691</b>	<b>743,656</b>	<b>778,722</b>	<b>807,258</b>	<b>829,322</b>	<b>855,407</b>	<b>879,551</b>	<b>150,860</b>	<b>20.7%</b>
<b>9-County Region</b>	<b>2,706,694</b>	<b>2,739,237</b>	<b>2,851,029</b>	<b>2,943,652</b>	<b>3,031,640</b>	<b>3,120,293</b>	<b>3,211,272</b>	<b>504,578</b>	<b>18.6%</b>

Source: Delaware Valley Regional Planning Commission, March 2005.

The surrounding areas are projected to have a more significant employment growth than Philadelphia over the period of analysis 2005 to 2035. However, many of these surrounding areas have a greater potential for growth than the City, which is largely built out. As shown in the chart, Philadelphia has a much larger employment base to begin with. In addition, public transportation is available for residents for commuting as well as a strong highway network.

**Schools**

The primary market area is serviced by the Philadelphia School District. This district offers High Schools, Middle/Elementary Schools, and preschools. The District consists of 176 Elementary Schools, 29 Middle Schools and 62 High Schools as well as 17 Alternative Education Schools and 28 Privately Managed Schools. The following is a list of public schools within the area surrounding the project.

The following is a list of public schools within the area surrounding the project.

**Philadelphia School District**

**School**

- Samuel Gompers Elem. School
- William B. Mann Elem. School (Charter)
- Dimner Beeber Middle School
- Overbrook High School

**Tab 3. Site and Neighborhood Standards**

Included in this section is information extracted from the Market study detailing the percentage of Affordable Housing in the areas as it relates to the entire housing stock

### Tab 3- Site and Neighborhood Standards

The Project is located in an area of the city that has limited housing opportunities for seniors. As evidenced by the attached excerpt of the market study, senior housing only makes up 12 % of the Affordable housing inventory in the target area.

There are currently 88 of units of senior housing available in the area. Of the 88 units available, 50 are represented by this project.

Therefore, it is anticipated that the new housing will be a positive influence to the neighborhood and its residences, as well as to the City.

8. **Complete the first section of the attached Housing Providers Needs Assessment Form and forward it to the Executive Director of the appropriate County and/or Local Housing Authority and/or Public Housing Agency serving the market area. The response must be incorporated into your evaluation and attached to this final report. If no response, document the date sent to the Housing Authority.**

### **Local Housing Response**

The Housing Providers Needs Assessment Form was sent to Mr. Kelvin A. Jeremiah, Executive Director of Housing for the City of Philadelphia. Due to time constraints; it has been indicated the authority indicated that the form would not be completed by the application date. However, documentation that the housing authority is aware of the impending project is attached to this report.

9. **List the name and address of all subsidized housing developments within the primary market area, including current occupancy levels and number of persons on the waiting list. If you are aware of any deviations in the occupancy levels and size of the waiting list in the past 2 or 3 years, please describe.**

### **Subsidized Housing within Market Area**

The supply of subsidized rental housing in the primary market area was determined based upon information provided by the Pennsylvania Housing Finance Agency, which is exhibited within the addenda of this report. Additionally, conversations with knowledgeable individuals revealed occupancy levels and number of persons on waiting lists. The following chart lists the assisted rental housing developments, their occupancy level, and the number of people on their waiting list (if available.)

Development	Assisted Housing Rental Developments						Zip Code	
	Total # of Units	# of 1-bedrm Units	# of 2-bedrm Units	# of 3-bedrm Units	# of 4-bedrm Units	# of 5-bedrm Units		# of 6-bedrm Units
Woodcrest Housing	11	0	0	8	3	0	0	19131
Neighborhood Restorations XIX	20	1	10	8	1	0	0	19131
Monument Mews	60	27	8	20	5	0	0	19131
Park Tower	157	156	1	0	0	0	0	19131
Kaearsley Care Housing	60	0	0	0	0	0	0	19131
Belmont Specialty Housing	40	0	0	0	0	0	0	19131
Wynnefield Place	48	0	0	0	0	0	0	19131
1670 N. 56th St.	1	0	0	1	0	0	0	19131
Rollie Associates IV	1	0	0	1	0	0	0	19131
Hestonville	24	2	11	11	0	0	0	19131
5414 W. Oxford St.	1	0	0	0	0	0	0	19131
1456 N. 56th St.	1	0	0	1	0	0	0	19131
1521 N. 57th St.	1	0	0	1	0	0	0	19131
Marsco Partnership	4	0	0	3	1	0	0	19131
1437 N. 55th St.	1	0	0	1	0	0	0	19131
1400N. 54th St. Apts.	3	1	2	0	0	0	0	19131
5513 Poplar St.	1	0	0	1	0	0	0	19131
Brooks School Apartments	33	33	0	0	0	0	0	19131
627 N. 57th St.	1	0	0	1	0	0	0	19131
5711 Poplar St.	1	0	0	1	0	0	0	19131
540 N. Allison St.	1	0	0	1	0	0	0	19131
Westminster Apartments	43	6	26	5	0	0	0	19131
Westminster Senior Apartment	41	24	5	0	0	0	0	19131
Help Philadelphia I	40	0	0	40	0	0	0	19131
Help Philadelphia II	50	50	0	0	0	0	0	19131
Pavillion	296	82	0	0	0	0	0	19131

Reportedly, there were not any significant deviations in the occupancy levels and size of the waiting list in the past 2 to 3 years. It appears that all of the subsidized developments for seniors in the Primary Market Area are 100% occupied except for times of turnover. According to the PHFA, there are a total of 5,530 subsidized units throughout primary market area; however there is only (1,853) one-bedroom and (1,182) two-bedroom within the primary market. In addition, there are only 675 subsidized units available to seniors within the subject areas zip code of 19131 of which (88) are currently proposed. The senior units only represent 12% of all the subsidized units within the primary market area.

10. Discuss the availability of affordable housing options including home ownership opportunities for the target population. Describe the age, condition, etc, of housing, and the extent of abandoned housing and other buildings within the primary market area. If possible identify any substandard housing in the primary market area.

### Home Ownership Vs. Rental

Housing options within the area for the target population include mostly older single-family attached housing, circa early 1930's along with mid-rise structures. There are a number of substandard, abandoned, and vacant properties within the primary market area. I am unable to adequately quantify the total number of these substandard units; however, it is likely that due to the age of the dwellings many may have lead base paint and inadequate wiring. Below is a graph

#### Tab 4. Housing Needs Analysis

Included in the section is:


- Excerpt from the West Park Plan completed by Philadelphia City Planning Commission identifying the need for housing and effective reuse and elimination of blighted structures. #24 on Pg. 35 (highlighted) indicates the need for senior housing in proximity to transportation and commercial corridors
- Market Study





# THRIVE > Neighborhoods

## Housing

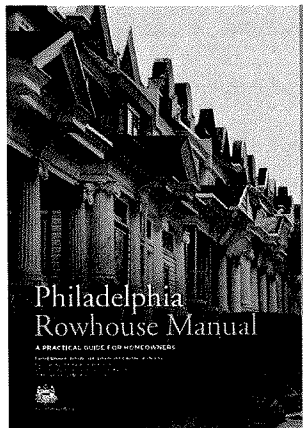


*Philadelphia2035  
Citywide Vision*

**Goal 1.2:**  
Improve the quality and diversity of new and existing housing.

### *Philadelphia Rowhouse Manual*

Published by the PCPC, the *Philadelphia Rowhouse Manual* offers homeowners tips and advice on maintaining and restoring their houses.



Housing choice is one of the major factors that encourages residential growth and the *Citywide Vision* outlines strategies to support and promote various types of housing at all price points. The West Park District offers a wide variety of housing choices. The district includes over 21,230 housing units of all types, from rowhouses to high-rise apartments to detached houses with large yards. The various neighborhoods also appeal to a wide variety of incomes, making West Park affordable to a great number of buyers. However, five of West Park’s neighborhoods were developed before World War II and almost all of the housing stock was constructed before 1970, leaving many neighborhoods with an aging infrastructure that may require greater investment to conform to modern-day conveniences.




The overall condition and market demand for housing varies greatly from neighborhood to neighborhood, but the population decline in West Park indicates that there is an overall drop in market demand throughout the district. The neighborhoods of Overbrook Farms and Green Hill Farms consist mainly of single-family, detached houses that are well maintained. They also are historically significant, which creates a visual and historical identity that leads to the least amount of vacancy and the highest sales prices.

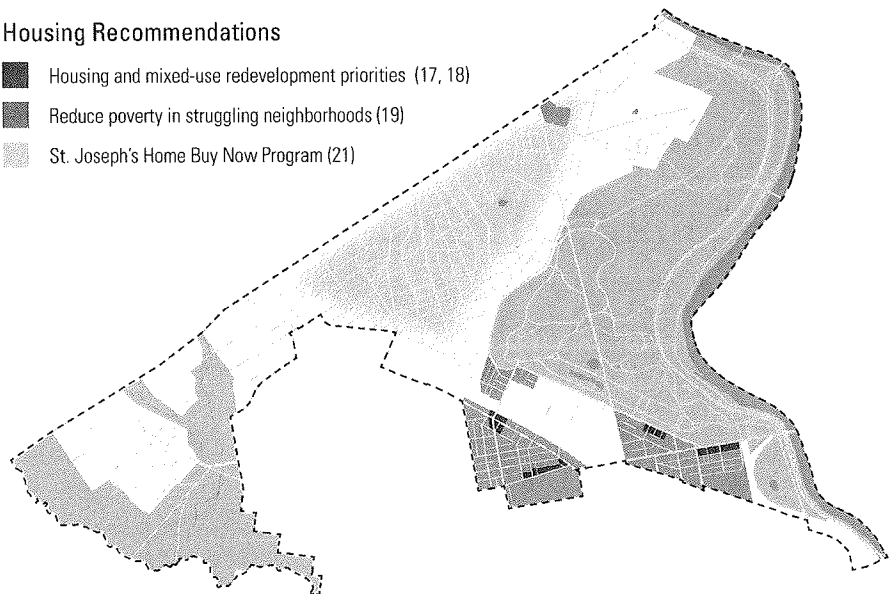
The neighborhoods of Wynnefield Heights, Overbrook Park, and Wynnefield are stable neighborhoods that are starting to see the signs of a weakening market with vacancy rates increasing. Wynnefield also has a large number of multifamily and special needs housing developments. These neighborhoods need a small amount of intervention to address these issues and increase stability.

East Parkside and Cathedral Park are characterized by 19th-century rowhouses. These neighborhoods have the highest vacancy, the lowest homeownership rates, and the lowest housing prices within the district. The neighborhoods also have the least demand for new housing units, leaving little use for the many vacant lots and buildings.

West Park has several hundred affordable housing units, mostly scattered-site housing managed by the Philadelphia Housing Authority. Nonprofits and small-scale developers also focus on providing affordable housing throughout the district. Residential facilities that serve the aging and physically and mentally disabled can be found in West Park, with many concentrated in the Wynnefield Heights neighborhood.

### Housing Recommendations

-  Housing and mixed-use redevelopment priorities (17, 18)
-  Reduce poverty in struggling neighborhoods (19)
-  St. Joseph’s Home Buy Now Program (21)



## Recommendations

17. Prioritize government-assisted projects to rehabilitate and reuse existing housing stock. Prioritize:
  - 3800–4000 blocks of Girard Avenue (a highly visible location)
  - 1700 blocks of Memorial Avenue, 42nd, and Marlton Streets (adjacent to prior housing investment)
    - > Implementing Agencies: OHCD, PRA | CW Objective: 1.2.1
18. Develop mixed-income housing development around the transit node of 52nd Street and Lancaster Avenue (see FOCUS AREAS p. 56).
  - > Implementing Agencies: OHCD, PRA, PHA | CW Objective: 1.2.2
19. Develop incentives to reduce concentrations of poverty in the neighborhoods of East Parkside, West Parkside, and Cathedral Park and encourage more market rate housing. Ensure that existing affordable housing is in good condition.
  - > Implementing Agencies: PRA, PHA, OHCD | CW Objective: 1.2.2
20. Concentrate new affordable housing as infill on stable blocks rather than in large new developments; prioritize scattered sites in Wynnefield.
  - > Implementing Agencies: PHA, OHCD, PRA | CW Objective: 1.2.1
21. Establish SJU and PCOM as partners in the City's Home Buy Now program to support home ownership in Wynnefield and Wynnefield Heights.
  - > Implementing Agencies: MDO | CW Objective: 1.2.1
22. Support programs that provide maintenance and home ownership education to help residents maintain the current housing stock.
  - Work with the Energy Coordinating Agency and EnergyWorks to educate homeowners about energy-efficient upgrades.
  - Intensively market the PHIL Loan program for low-interest loans for upgrades.
  - Intensively market programs for first-time home buyers, such as the American Dream Downpayment Initiative and Settlement Grant Program.
    - > Implementing Agencies: MOS, OHCD, nonprofits | CW Objective: 1.2.1
23. Provide more aging-in-place programs to help older residents stay in their houses for a longer period of time.
  - Encourage senior homeowners to enroll in adaptive modification programs such as those administered by the Philadelphia Corporation for the Aging (PCA), the Philadelphia Housing Development Corporation (PHDC) and other aging in place services.
    - > Implementing Agencies: OHCD, PCA | CW Objective: 1.2.2
24. Provide new housing for the elderly near services and amenities, such as transit and commercial corridors.
  - > Implementing Agencies: PRA, OHCD, PHA | CW Objective: 1.2.2

### Definition | Home Buy Now Program

Philadelphia Home Buy Now is a matching-grant program based on partnerships between the City of Philadelphia and major employers. Funds are used to assist employees who want to purchase a home in Philadelphia. Home Buy Now has many benefits, including neighborhood revitalization, increased homeownership, shorter commutes, and reduced traffic congestion.



EnergyWorks helps all homeowners in Philadelphia to increase the energy efficiency of their homes by bringing together all available rebates, tax credits, and low-interest financing with certified building analyst and contractors for home energy-efficiency upgrades.

### Definition | PHIL Loan

The Philadelphia Home Improvement Loan (PHIL Loan) program offers low-interest loans to homeowners for renovations. Interest rates vary from 3% to 5% APR based on income and size of the property and applications for a PHIL Loan can be made at PNC Bank, Citizens Bank or TD Bank. Only owner-occupied homes are eligible.



**Prepared For**

Mr. Harry Moody  
Pennrose Properties, LLC.  
One Brewery Park  
1301 North 31<sup>st</sup> Street  
Philadelphia, Pennsylvania 19121-4495

**Effective Date of Study**

November 11, 2014

**Market Study/Housing Needs Assessment**

**Proposed LIHTC Senior Project  
Wynne Theater Senior Apartments  
2001-11 N. 54<sup>th</sup> Street  
City of Philadelphia  
Philadelphia County, Pennsylvania  
JMA File No. 214301**

**Prepared By**

Jerome J. McHale, MAI  
PA Certified General GA-001359-R  
Certified Member of the National  
Council of Housing Market Analysts



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November 17, 2014

Mr. Harry Moody  
Pennrose Properties, LLC.  
One Brewery Park  
1301 North 31st Street  
Philadelphia, Pennsylvania 19121-4495

**Re: Proposed LIHTC Senior Project (Wynne Theater)**  
**2001-11 N. 54th Street**  
**Folio #88-2840000**  
**City of Philadelphia, Philadelphia County, Pennsylvania**  
**JMA File No. 214301**

Dear Mr. Moody:

In accordance with your request, I have prepared a Market Study and Housing Needs Assessment for the above referenced project. The objective of the study was to determine if an eligible market exists for this LIHTC project as currently being proposed, and to determine the achievable rent levels and capture rate.

The enclosed study states my opinion of the proposed project's anticipated position within the market relative to current and anticipated competition, rent and occupancy levels, and the anticipated absorption of the proposed units. It is supported by thorough research of the immediate market by my firm along with demographic and housing trends information provided by other sources deemed to be reliable. The appraiser made a comprehensive physical inspection of the project, its market area, and all comparable property information.

The proposed LIHTC project consists of (50) new/rehabilitated senior units (62+ aged) located in the City of Philadelphia. The project is located at the northeast corner of N. 54<sup>th</sup> Street and Arlington Street.

The proposed project involves the new/rehabilitated construction of (45) one-bedroom and (5) two-bedroom units within a four-story building. Proposed amenities include air conditioning units in all living areas, on-site management and maintenance, community room, small commercial space, lounge, and common laundry facilities. On-site parking (11 spaces) will be provided on the ground floor.

Pennrose Properties is seeking to provide newly constructed, affordable units to be occupied by households earning 20% to 60% or less of area median income. The new housing development will consist of public housing units (40%) and LIHTC units (60%).

Based upon my analysis of the subject and current market conditions, I anticipate that the subject will perform exceptionally well in its primary market area. The public housing waiting lists demonstrate a strong need for quality affordable housing within the primary market area. There is a strong demand and limited supply for quality affordable housing in this area. The new/rehabilitated construction of the units will allow the subject to compete well with the existing and proposed stock of housing. The base rental rates for comparable market rent complexes were above the proposed LIHTC rates. The good overall condition of the subject would enable it to command rental rates near the high end of the typical market level.

The subject site has good access to major routes of transportation, employment centers, shopping, and other services. The proposed rental rates are below market, which will attract potential renters. Based upon conversations with various parties involved in the community and housing within the primary market area, this type of quality housing is needed.

Some negative factors for the proposed project include; its urban area with relatively poor economic conditions and crime, and the need for rehabilitation of the existing housing stock, since most of it is older and in need of substantial repairs.

Overall, the proposed project will help enhance the appeal of the neighborhood. The proposed new/rehabilitated construction of the units will enable the project to compete with more modern units and command rental rates at the upper end of the market. Based upon supply and demand for such units and current market conditions, the subject should be absorbed quickly and maintain a high level of occupancy.

The enclosed market study includes the information relevant to the analysis of the proposed project as well as the methodology used to arrive at the conclusions. It has been prepared in conformity with Standards 4 and 5 of the Uniform Standards of Professional Practice of the Appraisal Foundation as well as the requirements of the Pennsylvania Housing Finance Agency (*PHFA*) and the National Council of Housing Market Analysts. The market study is certified to both the client and to the PHFA. Attached is the market study with my findings.

Very Truly Yours,



Jerome J. McHale, MAI  
PA Certified General GA-001359-R  
Certified Member of the National  
Council of Housing Market Analysts

Enclosures  
214301 Wynne Theater Senior

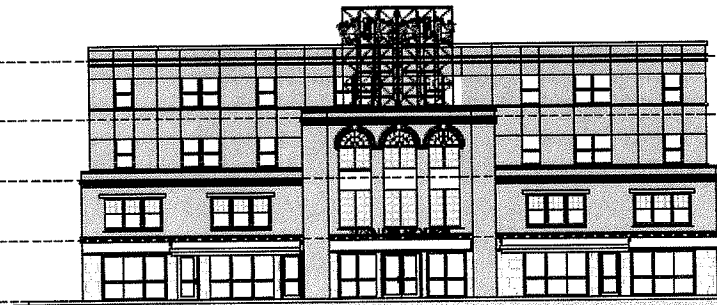
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## Subject Property



"Currently"



"As Proposed" - Rendering



## Summary Of Facts & Conclusions

Subject Property: **Proposed LIHTC Senior Project**  
**2001-11 N. 54th Street**  
**City of Philadelphia**  
**Philadelphia County, Pennsylvania**

Property Type: Proposed LIHTC Senior Occupancy Project

Unit Count:

Unit Type	Count	Unit Size
One bedroom/1 bath	45	688 SF (avg.)
Two bedroom/1 bath	<u>5</u>	948 SF (avg.)
	50	

Anticipated Absorption: Rate: 10 - 14/Month  
Absorption Period: 3.6 – 5.0 Months

Estimated Capture Rate:

Capture Rate Conclusions		
	Before Existing Competition	After Existing Competition
<b>All Units:</b>	0.95%	2.24%

Pricing Advantage:

Summary Of LIHTC Rent Analysis							
Unit Type	(A) Proposed LIHTC Rents @ GMFI	(B) LIHTC Maximum allowable rents	(C) Proposed Vs. Max  <i>((B-A)/B)</i>	(D) Reconciled Market Rate	(E) Utility Allowance	(F) Net Market Rental	(G) Proposed Vs. Market  <i>((F-A)/F)</i>
1 Bedroom @ 60%	\$745	\$1,189	-37%	\$875	\$142	\$1,017	-27%
2 Bedroom @ 60%	\$886	\$1,419	-38%	\$975	\$179	\$1,154	-23%

Conclusions:

**Positive Factors of the Proposed Project:**

- As proposed, the units will offer large units with desirable modern features and amenities.

- The public housing waiting lists demonstrate a strong need for quality affordable housing within the primary market area.
- The project area is part of the Wynnefield-Overbrook Redevelopment Plan.
- The base rental rates for comparable market rent complexes were above the proposed LIHTC rates. The good overall condition of the subject would enable it to command rental rates near the high end of the typical market level.
- Vacancy within the market is minimal.
- Stable to slightly increasing rates are anticipated.
- The rehabilitated/new construction will make the subject attractive to the typical resident.
- There appears to be a sufficient market demand for subsidized complexes especially for the LIHTC product.
- With limited new construction coming online, a demand for newer quality housing continues to exist.
- There are an adequate number of income-qualified residents in the primary market area to support the proposed project.
- Capture rate is favorable with and without competition.
- The project is considered a good alternative to homeownership, which could be financially burdensome due to the age of the housing stock and the additional fallout from the collapse of the sub-prime mortgage market.
- Accessible via public transportation to the various employment areas within the city.
- Local shopping is within close proximity of the subject.

**Negative Factors of the Proposed Project:**

- Urban area with relatively poor economic conditions and high crime in surrounding area.
- The neighborhood is in need of rehabilitation of the existing housing stock, since most of it is older and in need of repairs.

## Objective Of The Study

The objective of the study was to determine if an eligible market exists for this LIHTC project as currently being proposed, and to determine the achievable rent levels and capture rate.

## Purpose & Intended Use Of The Study

The purpose of the study was to determine if an eligible market exists for this LIHTC project based on this particular client's development objectives and, consequently, has been developed to determine the current market's ability to support those particular objectives. As such, the conclusions and recommendations in this study are applicable only to the proposed project as currently planned.

The intended use of the study by the client is for its submission to the Pennsylvania Housing Finance Agency (*PHFA*) as part of its application for project funding and qualification as an LIHTC project. As such, the study is certified to both the client and to the PHFA.

## Scope Of The Study

In the preparation of this Market Study, I have conducted a variety of activities including but not limited to the following:

- ◆ A physical inspection of the subject property, its market area, and all comparable properties was performed.
- ◆ Data has been collected regarding the physical characteristics of the subject property, neighborhood trends and influences, market trends and influences, typical amenities and utilities, zoning and related controls, and the subject's tax assessment and real estate tax obligation as compared to other similar properties within the market area.
- ◆ The following documents were reviewed:
  - Zoning Map & Ordinance
  - City Tax Assessment Maps
  - Unit Plans prepared by Kitchen & Associates Architectural Services, PA.
  - Demographics provided by HISTA (Ribbon Demographics).
- ◆ The following were interviewed:
  - Curtis Jones Jr. - Councilman
  - Gerald Murphy, Director, WORC (Wynnefield-Overbrook Revitalization Corporation)

- Lori Salgaanicoff, Executive Director, WORC
  - Gary Jastzrab, Philadelphia City Planning Commission
  - Wand Staples, President, Wynnefield Residence Association
  - Apartment leasing agents/managers at competing market rate & subsidized housing complexes
- ◆ All of these factors have been considered in determining the marketability of the proposed project.
  - ◆ All research and analyzed information has been utilized in order to come to the conclusions for the proposed project.

## **Effective Date Of The Study & Property Inspection**

The initial inspections of the subject property were conducted on October 28, 2013 and November 11, 2014 with inspections subsequent and prior. The date of the study is November 11, 2014. The consultant performed an exterior inspection of the existing building, since it boarded and fence-enclosed to help prevent breaching. The date of the preparation of the study is shown on the letter of transmittal attached with this report.

## **Project Overview**

The proposed project involves the new/rehabilitated construction of one and two-bedroom flats within the four-story building. The existing boarded community center (former theater) will be demolished/rehabilitated and additional stories will be added in order to meet the needs of the apartment units, while keeping some of the architectural design of the building.

J. McHale & Associates, Inc.



C-9	CONCEPTUAL IMAGE

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**Wynne-Senior Residence**  
54th Street & Arlington Street, Philadelphia, Pennsylvania, 19131.

Proposed amenities include air conditioning units in all living areas, on-site management and maintenance, community room, lounge, small commercial space, and common laundry facilities.

Pennrose Properties intends the project to be developed and operated under the provisions of Section 42 of the Internal Revenue Code within the Low Income Housing Tax Credit Program (*LIHTC*).

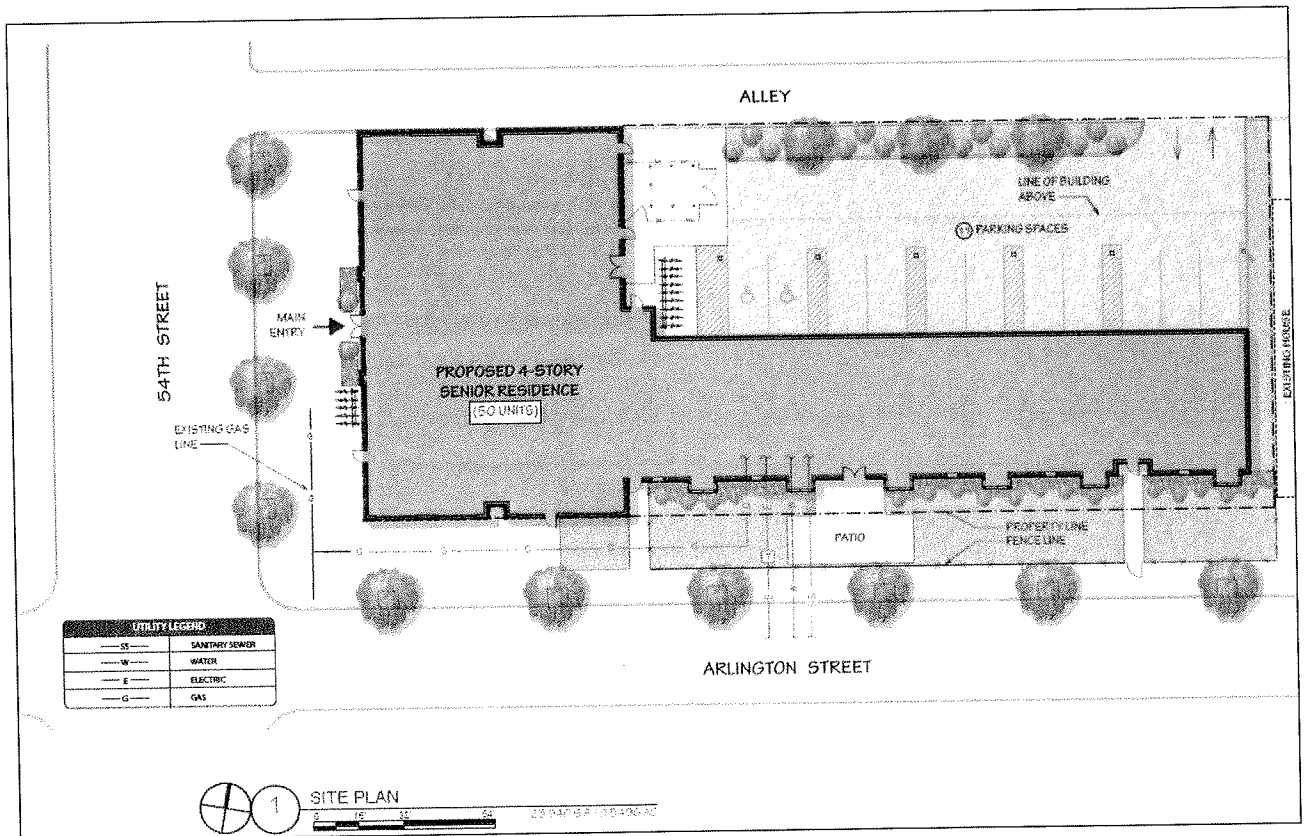
## **The Subject Property**

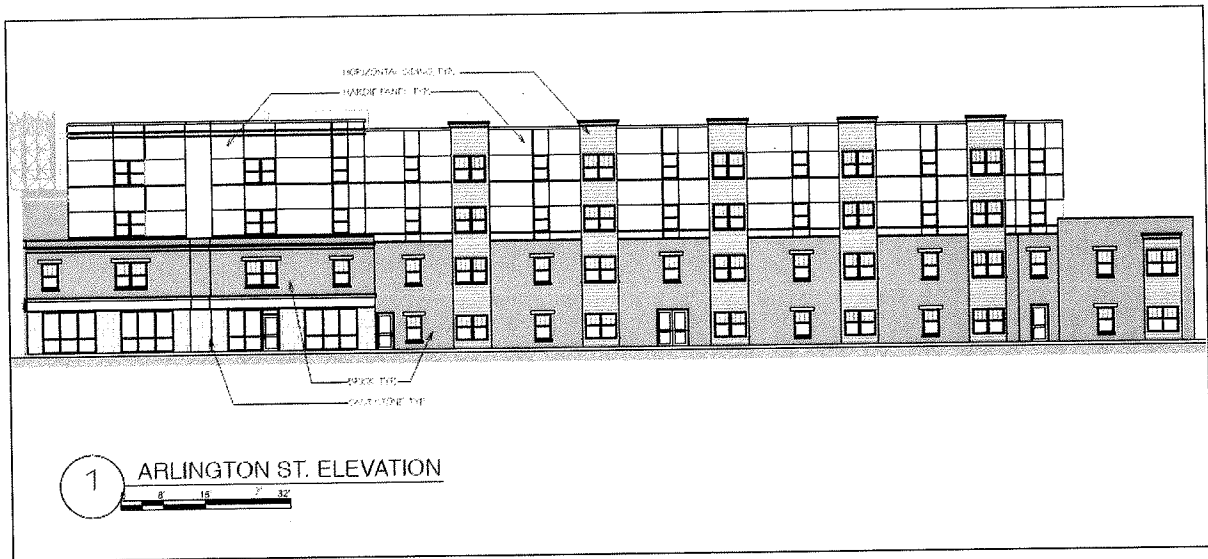
### **Land & Site Improvements**

Land and site descriptions are based upon review of the site plan and on-site property inspection. The subject consists of one parcel, which is identified as follows:

<b>Characteristics of the Site</b>	
Folio #	88-2840000
Topography	Relatively level
Visibility/Exposure/Frontage	Street frontage along two streets with typical residential/commercial visibility and exposure.
Easements	No known adverse easements appear to impact the property.
Drainage	Appeared adequate; however, consultant is not an expert in this field.
Utilities	Public water, sewer, gas, electric, and telephone are available.
Parking	(11) on-site parking spaces will be provided, but it is not uncommon for an apartment complex within the city to have no on-site parking.

The reader is urged to seek legal, engineering, and environmental counsel for any authoritative opinion as to the legally usable area and possibility of contamination of the property.





**Building Improvements**

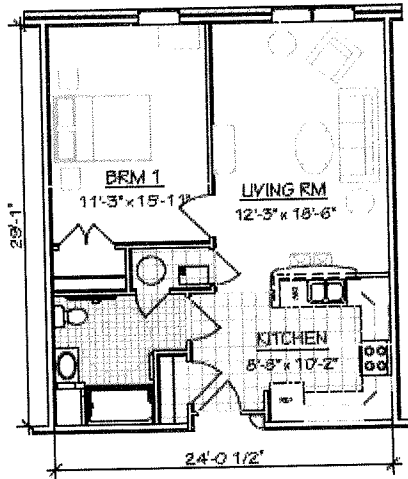
The overall project will consist of the new construction of 1 & 2 bedroom flats in a four-story building available to senior citizens. The units will be distributed as follows:

Unit Type	Count	Unit Size
One bedroom/1 bath	45	636-772 SF
Two bedroom/1 bath	5	805-948 SF
	50	

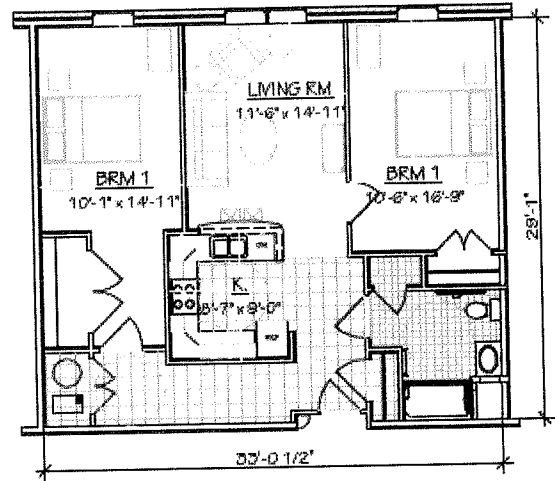
Unit Amenities and Features	
Construction:	Masonry and wood construction, insulated vinyl windows with screens, and flat roof cover.
General Unit Layout:	Living/dining room, kitchen, full bathroom, one-bedroom and closet.
Unit Amenities:	<ul style="list-style-type: none"> <li>• Central air conditioning</li> <li>• Wall-to-wall carpeting in the bedrooms and hallway with vinyl sheet flooring and tile flooring in baths.</li> <li>• Self cleaning oven, &amp; refrigerator</li> <li>• Community washers and dryers</li> <li>• 100% Handicap adaptable</li> </ul>
Other:	<ul style="list-style-type: none"> <li>• On-site management and maintenance</li> <li>• Community room</li> </ul>



- Common laundry facilities
- Lounge
- Small commercial unit



1 TYPICAL ONE BEDROOM UNIT  
SCALE: 1/8" = 1'-0"



2 TYPICAL TWO BEDROOM UNIT  
SCALE: 1/8" = 1'-0"

The characteristics of the proposed project should mix well with the neighborhood and will be comparable or superior to most of the similar existing housing stock in the neighborhood and/or city. The units will be competitive in size with the existing stock and will be comparable superior in amenities and features.

The subject's proposed unit count of 50 units is within the market range for unit count. This project will offer good market presence due to its good physical condition, attractive architectural design, location, amenities, and adequate unit sizes. It is expected to compete well in the market. There continues to be a need for newer affordable housing in the area. As such, the size and unit mix of the subject are expected to be well received within the market.

### Land Use Controls (Zoning)

The subject is located in the **CMX-3, Commercial Mixed Use District**. Per Bill No. 130695, passed by the Philadelphia City Planning Commission, the subject property was rezoned to all CMX-3, which will permit the developer to construct the 60,000 SF building with

**J. McHale & Associates, Inc.**

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1,200 SF of commercial space and accessory parking. A copy of zoning documentation has been included in the addenda of this report.

## MARKET STUDY/HOUSING NEEDS ASSESSMENT

Wynne Theater Senior Apartments

**Proposed Development Name**

2001-11 N. 54th Street

**Street Address**

City of Philadelphia

**City**

Philadelphia

PA

19131

**County**

**State**

**Zip**

Housing Type:  Elderly 62+  General Occupancy  
 Elderly 55+  Other (describe)

Total Number of Rental Units: 50

1. Provide a narrative describing the primary and secondary market areas and the factors used in making your determination and attach a street map outlining the primary market area including all amenities in addition to outlining the primary market area. List each zip code/census tract or part thereof which comprises the primary market area that specifically references the location of the proposed site.

The present and future potential of any individual property is directly related to its surrounding market environment. The market environment affecting a property is composed of a specific area that is delineated by one or a combination of factors including physical features, economic-financial factors, political-governmental entities, sociological, and locational factors.

The subject property is located in the City of Philadelphia, which encompasses Philadelphia County, Pennsylvania. Philadelphia County is part of the nine county Delaware Valley River Port Commission region (DVRPC). The DVRPC comprises the New Jersey counties of Burlington, Camden, Gloucester & Mercer, and the Pennsylvania counties of Bucks, Chester, Delaware, Montgomery, and Philadelphia.

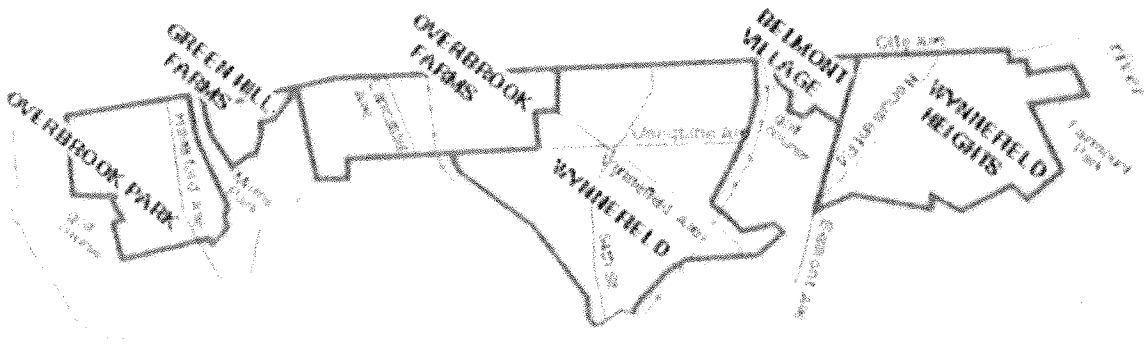
The county is located in the southeast portion of the Commonwealth of Pennsylvania with Bucks and Montgomery Counties to the north and west, the Delaware River to the east and south and Delaware County to the west and south.

The County encompasses a total land area of 143 square miles and is the heart of the Philadelphia Metropolitan Area. Much of the area along the Delaware River is developed with older industrial and office uses, while the remainder of the county is mostly built out with a mix of commercial and residential uses. As a result of its being the heart of the Philadelphia

Metropolitan Area and its extensive network of highways and commuter rail service, continued expansion is anticipated.

The region is served by an extensive network of highways and bridges, which provide good access to most portions of Pennsylvania, New Jersey, Delaware, and the eastern seaboard. Major highways throughout the County include the Interstate 76, 95, and 476.

The subject is located in the Wynnefield neighborhood of the City of Philadelphia. The neighborhood is bound by the Septa R5 rail-lines to the east, west and south and City Line Avenue to the north.



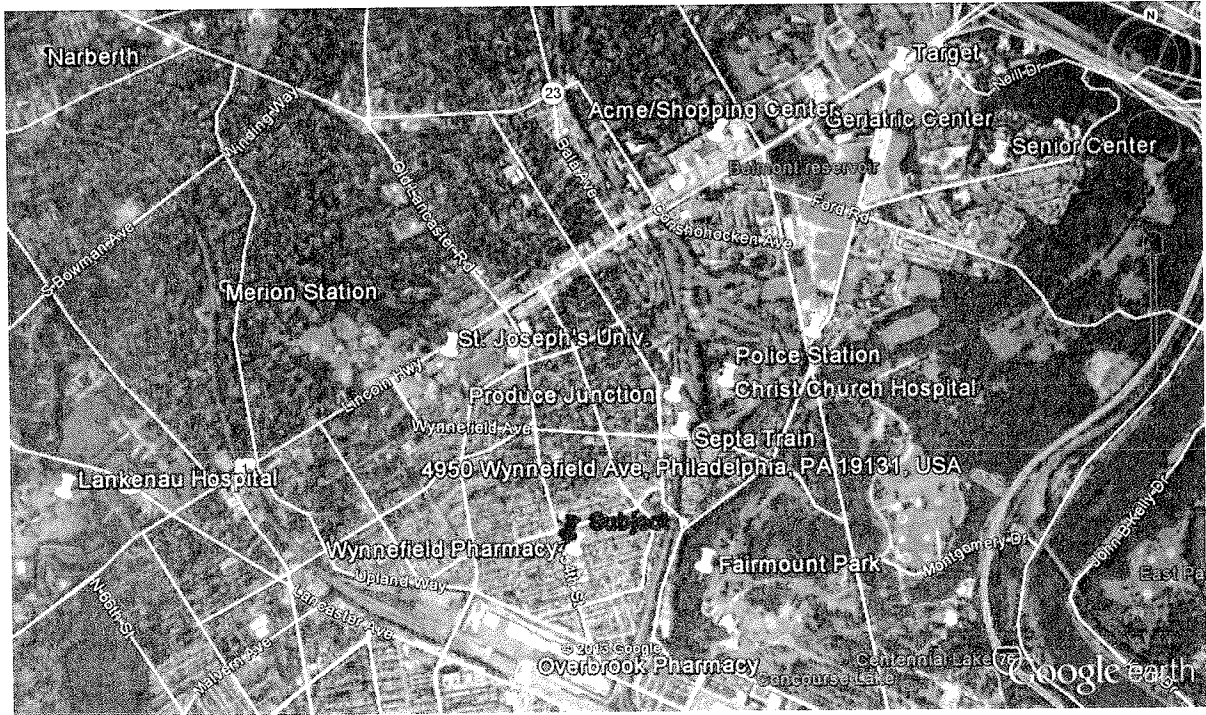
Uses within the immediate neighborhood are a mix of residential and neighborhood commercial. The property is south of City Line Avenue (US Route 1), which most of the office and commercial uses are located.

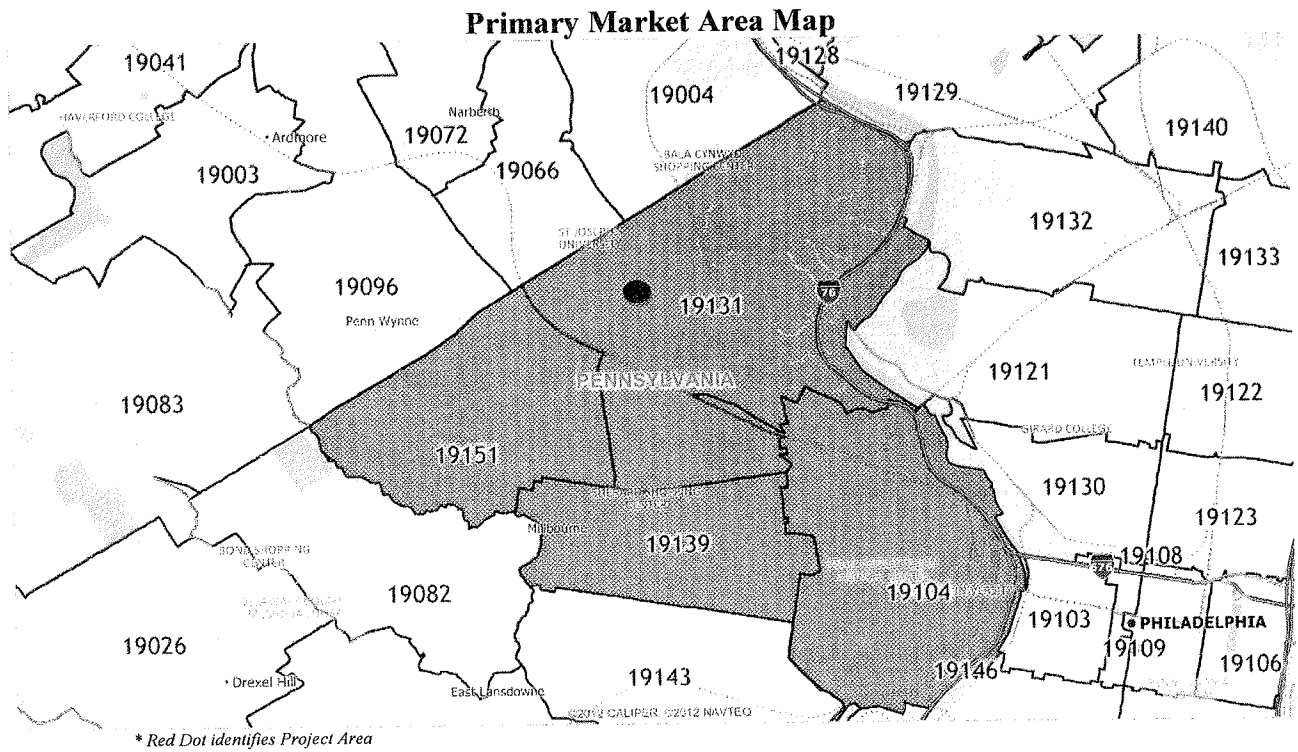
### **Primary Market Area**

The subject is located in the Wynnefield section of Philadelphia. It is in close proximity to Interstate 76 and US Route 1, a strong network of highways, and public transportation. The subject's primary market area was determined based upon a variety of factors including but not limited to the following:

- a. Other competing and comparable rental properties: - interviews with local rental agents indicated that the defined area is where the majority of potential renters are obtained.
- b. Accessibility – the defined area is comparable in accessibility to major highways, employment centers, and other local conveniences.

- c. The Natural and Manmade boundaries are justified by a portion of Schuylkill River, Fairmount Park and Interstate 76 to the east, US Route 1 to the north and west, and center city to the south.
- d. Neighborhood housing characteristics – much of the primary market area is comprised of street front commercial and semi-attached/attached housing. Other portions of the primarily consists of two-story rowhomes in densely populated areas.
- e. Market perceptions – The immediate area has a relatively average market perception in regards to crime, housing conditions, and overall appeal. It's location as a bridge from the various Center city sections of the city to the City Avenue is attractive.
- f. Other (census tracts and analysis of zip codes) – the primary market area is within the 19131, 19139, 19151 and 19104 zip codes and is comprised of the various census tracts in the Geocode ID for the City of Philadelphia. These are the areas that offer homogenous land uses and similar development patterns as the subject.





## Secondary Market Area

The subject's secondary market area includes the entire City of Philadelphia and county areas surrounding the city

2. **Provide photographs of the site from a minimum of two perspectives. The photographs must be originals or color copies and should be dated. For multiple sites, the photographs must identify the sites address. All photographs must be clear and show the detail of an buildings.**

See Addenda for Photograph pages.

3. **The Market Analysts should determine whether the proposed development is located in an urban, suburban, or rural area and explain the methodology for their determination.**

## Subject Within Urban Area

    X     Urban                 Suburban                 Rural

The proposed development is within an urban area. The Census Bureau defines "urban" as comprising all territory, population, and housing units in urbanized areas and in places of 2,500 or more persons outside urbanized areas. More specifically, "urban" consists of territory, persons, and housing units in:

- a) Places of 2,500 or more persons incorporated as cities, villages, boroughs (except in Alaska and New York), and towns (except in the six New England States, New York, and Wisconsin), but excluding the rural portions of "extended cities."
- b) Census designated places of 2,500 or more persons.
- c) Other territory, incorporated or unincorporated, included in urbanized areas.

Territory, population, and housing units not classified as urban constitute "rural." Therefore, the subject area is densely populated with 2,500 persons within its census tract and is considered to be in an Urban area.

4. **Provide the number of age and income qualified renter and homeowner households for the primary market area from the 2010 census, and a five-year projection. Discuss the population trend and the three factors that are having the most impact on the trend.**

2010 16,533 2014 17,777 5-year Projection from current date 19,477

**Data Source:** Household demographic data was analyzed for the primary market area with information obtained from the HISTA report from Ribbon Demographics. This report is exhibited in the Addenda.

The factors having the most impact on population trends in the area are the expansion of city and urban land trends. Scattered sites become developed and industrial uses change, but the ability to finance this infrastructure change is a concern. Limited financing and lack of government funding for a wide range of proposed projects in the city will slow development which impact population trends. A positive impact on the population trend in the immediate area will also be the expansion of the closest neighborhoods into the subject area, while the expansion of the Saint Joseph's University area will create added pressure from the northwest.

### **Age & Income Qualified Renter & Homeowner Households**

Household data for ages 62 and up were utilized for this analysis for 100% of the project, which is age-restricted.

To operate under the LIHTC program, the developer has chosen the following unit breakdown.

<b>Gross Rental Income</b>		Gross Tenant	Less: Utility	Net Tenant
<u>Unit Type</u>	<u># of Units</u>	<u>Rent</u>	<u>Allow</u>	<u>Rent</u>
20% AMI Units				
1BR	5	\$392	(\$142)	\$250
50% AMI Units				
1BR	20	\$739	(\$142)	\$597
60% AMI Units				
1BR	20	\$887	(\$142)	\$745
2BR	5	\$1,065	(\$179)	\$886
	<u>50</u>			

A project meeting the minimum tenant occupancies will only receive the minimum amount of tax credits, while a project reflecting full tenant participation is able to receive the full annual tax credit allocation. LIHTC projects must maintain their qualification for a minimum of 15 years, while the tax credits are only available for 10 years.

The 2014 Gross Median Family Income (*GMFI*) for the subject's market (*Philadelphia County*) is \$78,800 as dictated by HUD. The HUD maximum income limits per person based on the following percentages of the GMFI are shown as follows for this market:



<b>% of GMFI</b>	<b>1 person</b>	<b>1.5 persons</b>	<b>3 persons</b>	<b>4.5 persons</b>	<b>6 persons</b>
20%	\$11,040	\$11,830	\$14,200	\$16,400	\$18,300
50%	\$27,600	\$29,575	\$35,500	\$41,000	\$45,750
60%	\$33,120	\$35,490	\$42,600	\$49,200	\$54,900

Once the income levels are established, the total permissible housing payment for low-income residents is typically calculated based on 30% of the maximum income limit. However, the Pennsylvania Housing & Mortgage Finance Agency (*PHFA*) permits the calculation based on 45% (elderly) of the maximum income limit for market assessment purposes. The total payment allowed per apartment is based on the size of the family assumed to be living in the unit. The maximum gross rents are based upon an assumed household size established by the IRS, which is shown in Table II as follows:

<b>Unit Type</b>	<b>Household Size</b>
Studio	1.0 person
One-bedroom	1.5 persons
Two-bedroom	3.0 persons
Three-bedroom	4.5 persons
Four-bedroom	6.0 persons

The number of households at various income levels that are age qualified is exhibited as follows:



[www.ribbondata.com](http://www.ribbondata.com)

HISTA 2.2 Summary Data

Philadelphia, PA PMA 1

nielsen

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Nielsen Claritas

<b>Renter Households</b>						
Aged 62+ Years						
<i>Base Year: 2006 - 2010 Estimates</i>						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	1,411	212	67	33	37	<b>1,760</b>
\$10,000-20,000	1,384	316	78	38	52	<b>1,868</b>
\$20,000-30,000	393	156	78	32	26	<b>685</b>
\$30,000-40,000	333	141	37	24	26	<b>561</b>
\$40,000-50,000	167	52	35	20	18	<b>292</b>
\$50,000-60,000	116	59	23	26	11	<b>235</b>
\$60,000-75,000	125	51	20	13	12	<b>221</b>
\$75,000-100,000	84	43	30	21	15	<b>193</b>
\$100,000-125,000	104	71	24	14	15	<b>228</b>
\$125,000-150,000	43	20	5	9	3	<b>80</b>
\$150,000-200,000	48	16	13	5	10	<b>92</b>
\$200,000+	<u>38</u>	<u>29</u>	<u>7</u>	<u>7</u>	<u>6</u>	<b>87</b>
<b>Total</b>	<b>4,246</b>	<b>1,166</b>	<b>417</b>	<b>242</b>	<b>231</b>	<b>6,302</b>

<b>Owner Households</b>						
Aged 62+ Years						
<i>Base Year: 2006 - 2010 Estimates</i>						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	1,165	278	95	36	65	<b>1,639</b>
\$10,000-20,000	1,574	598	171	77	45	<b>2,465</b>
\$20,000-30,000	567	568	128	81	83	<b>1,427</b>
\$30,000-40,000	419	378	139	110	103	<b>1,149</b>
\$40,000-50,000	211	404	116	77	32	<b>840</b>
\$50,000-60,000	174	361	94	65	83	<b>777</b>
\$60,000-75,000	164	195	118	78	42	<b>597</b>
\$75,000-100,000	127	252	99	47	64	<b>589</b>
\$100,000-125,000	113	135	81	29	15	<b>373</b>
\$125,000-150,000	25	33	17	13	15	<b>103</b>
\$150,000-200,000	29	54	30	23	14	<b>150</b>
\$200,000+	<u>27</u>	<u>66</u>	<u>13</u>	<u>12</u>	<u>4</u>	<b>122</b>
<b>Total</b>	<b>4,595</b>	<b>3,322</b>	<b>1,101</b>	<b>648</b>	<b>565</b>	<b>10,231</b>

<b>Renter Households</b>						
Aged 62+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,593	202	83	23	26	<b>1,927</b>
\$10,000-20,000	1,748	335	83	41	38	<b>2,245</b>
\$20,000-30,000	500	166	91	33	25	<b>815</b>
\$30,000-40,000	375	133	39	23	26	<b>596</b>
\$40,000-50,000	131	54	36	19	16	<b>256</b>
\$50,000-60,000	118	55	19	20	15	<b>227</b>
\$60,000-75,000	138	68	19	14	15	<b>254</b>
\$75,000-100,000	58	32	26	19	16	<b>151</b>
\$100,000-125,000	80	40	29	15	13	<b>177</b>
\$125,000-150,000	30	15	2	10	4	<b>61</b>
\$150,000-200,000	25	17	8	8	8	<b>66</b>
\$200,000+	<u>17</u>	<u>15</u>	<u>7</u>	<u>7</u>	<u>6</u>	<b>52</b>
<b>Total</b>	<b>4,813</b>	<b>1,132</b>	<b>442</b>	<b>232</b>	<b>208</b>	<b>6,827</b>

<b>Owner Households</b>						
Aged 62+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,172	306	101	57	68	<b>1,704</b>
\$10,000-20,000	1,679	669	236	97	39	<b>2,720</b>
\$20,000-30,000	673	688	181	104	76	<b>1,722</b>
\$30,000-40,000	424	357	172	134	80	<b>1,167</b>
\$40,000-50,000	209	331	106	85	32	<b>763</b>
\$50,000-60,000	136	358	107	55	98	<b>754</b>
\$60,000-75,000	195	267	138	96	52	<b>748</b>
\$75,000-100,000	138	268	116	49	60	<b>631</b>
\$100,000-125,000	101	93	58	21	21	<b>294</b>
\$125,000-150,000	29	55	14	14	20	<b>132</b>
\$150,000-200,000	34	47	28	26	10	<b>145</b>
\$200,000+	<u>45</u>	<u>87</u>	<u>23</u>	<u>13</u>	<u>2</u>	<b>170</b>
<b>Total</b>	<b>4,835</b>	<b>3,526</b>	<b>1,280</b>	<b>751</b>	<b>558</b>	<b>10,950</b>

<b>Renter Households</b>						
Aged 62+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,690	197	95	23	30	<b>2,035</b>
\$10,000-20,000	1,900	373	89	39	41	<b>2,442</b>
\$20,000-30,000	546	187	92	30	21	<b>876</b>
\$30,000-40,000	415	147	42	20	19	<b>643</b>
\$40,000-50,000	182	73	37	20	16	<b>328</b>
\$50,000-60,000	124	55	26	24	16	<b>245</b>
\$60,000-75,000	175	67	27	13	14	<b>296</b>
\$75,000-100,000	73	45	31	26	14	<b>189</b>
\$100,000-125,000	116	61	43	12	11	<b>243</b>
\$125,000-150,000	66	27	4	12	11	<b>120</b>
\$150,000-200,000	49	26	7	7	3	<b>92</b>
\$200,000+	<u>38</u>	<u>29</u>	<u>9</u>	<u>9</u>	<u>10</u>	<b>95</b>
<b>Total</b>	<b>5,374</b>	<b>1,287</b>	<b>502</b>	<b>235</b>	<b>206</b>	<b>7,604</b>

<b>Owner Households</b>						
Aged 62+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,212	312	101	46	59	<b>1,730</b>
\$10,000-20,000	1,724	656	225	95	33	<b>2,733</b>
\$20,000-30,000	705	706	190	122	72	<b>1,795</b>
\$30,000-40,000	459	401	204	148	83	<b>1,295</b>
\$40,000-50,000	229	390	125	89	38	<b>871</b>
\$50,000-60,000	149	384	110	55	104	<b>802</b>
\$60,000-75,000	249	295	164	106	57	<b>871</b>
\$75,000-100,000	163	326	138	59	69	<b>755</b>
\$100,000-125,000	139	128	87	29	26	<b>409</b>
\$125,000-150,000	36	60	21	11	30	<b>158</b>
\$150,000-200,000	46	69	29	29	14	<b>187</b>
\$200,000+	<u>78</u>	<u>119</u>	<u>39</u>	<u>28</u>	<u>3</u>	<b>267</b>
<b>Total</b>	<b>5,189</b>	<b>3,846</b>	<b>1,433</b>	<b>817</b>	<b>588</b>	<b>11,873</b>

Based upon the presented demographic and income data, it appears that there are a number of qualified renters within the market area for this project. The following chart summarizes the income eligible renter and homeowner households within the primary market.

Capture Rate Analysis for the LIHTC Units @ 60% GMFI							
Year	Total Households	All Units (Aged 62+)			Eligible Households as a % of Total Area	Estimated Capture Rate	Capture Rate With Competition
		Income Eligible Renter Households	Income Eligible Homeowner Households	Total Income Eligible Households			
2006-2010 (Avg.)	16,533	2,820	2,273	5,093	30.8%	0.98%	2.43%
2014	17,777	2,809	2,458	5,268	29.6%	0.95%	2.24%
2019	19,477	2,804	2,661	5,464	28.1%	0.92%	2.06%

- Using the number of age and income qualified renter and homeowner households located within the primary market area, compute the development specific capture rate percentage using the 2010 Census data. The minimum household income being used for total housing expenses should not exceed a total housing expense to income ratio of 40% and 45% for general and elderly occupancy designated projects, respectively.

Provide the total/sum of the renter and homeowner households in the primary market area by age and income qualifications. The minimum household income being used for total housing expenses should not exceed 40% for general occupancy or 45% for elderly occupancy. Based on this information compute the development specific primary market area's capture rate percentage for the qualified households to the projected number of units being proposed by income type.

The total number of units proposed 50 divided by the number of age and income qualified households 5,268 equals a capture rate of 0.95 %.

In addition to the development specific capture rate, compute the overall primary market area's capture rate percentage, which incorporates both the number of units proposed for the subject property and the total of similar (general, senior, bedroom size, homeless special needs etc.) existing and proposed PennHOMES and Tax Credit units in the primary market area. If the proposed development includes Project Subsidized units, also include like developments in the PMA.

The total number of units proposed 50 divided by the number of age and income qualified households less the total of existing units equals an overall capture rate of 2.24%.

\* 50 / (5,268 - 3,035)

### Maximum Allowable Rent

The developer plans to make the units available to households with incomes at or below 20% to 60% of the GMFI. The gross rent ceilings and maximum allowable rent levels by apartment type are shown as follows:

LIHTC Rent Ceiling & Maximum Rent Level (@ 20% of GMFI)							
Area	# of Family Members	Maximum Income	Maximum Rent Factor	Annual Gross Rent Ceiling	Monthly Gross Rent Ceiling	Utility Allowance	Maximum Allowable Rent
1 Bedroom	1.5	\$11,830	45%	\$5,324	\$444	\$142	\$302
LIHTC Rent Ceiling & Maximum Rent Level (@ 50% of GMFI)							
Area	# of Family Members	Maximum Income	Maximum Rent Factor	Annual Gross Rent Ceiling	Monthly Gross Rent Ceiling	Utility Allowance	Maximum Allowable Rent
1 Bedroom	1.5	\$29,575	45%	\$13,309	\$1,109	\$142	\$967
LIHTC Rent Ceiling & Maximum Rent Level (@ 60% of GMFI)							
Area	# of Family Members	Maximum Income	Maximum Rent Factor	Annual Gross Rent Ceiling	Monthly Gross Rent Ceiling	Utility Allowance	Maximum Allowable Rent
1 Bedroom	1.5	\$35,490	45%	\$15,971	\$1,331	\$142	\$1,189
2 Bedroom	3.0	\$42,600	45%	\$19,170	\$1,598	\$179	\$1,419

The gross rent ceilings do not include an allowance for utilities. The maximum rent that a tenant may actually be charged is the rent ceiling less the utility allowances. The utility allowance estimate is based on utility cost estimates provided by the PA Housing Finance Agency and has been compared to the project developer's estimate. As such, the maximum allowable rent under each percentage of GMFI scenario is shown in the above tables.

The maximum allowable rent levels for each apartment type presented above cannot exceed the market rent for that particular unit type. This is known as the "achievable" rent level.

In a situation where the restricted rent exceeds the market rent, the market rent is the highest rent that can be charged for the unit. The maximum allowable rent levels calculated above will be compared with current market rent levels later in this study. As will be shown, the maximum allowable rent exceeds the rent levels currently being commanded by the market projects.

### **Capture Rate Analysis & Minimum Income**

In this analysis, the estimated capture rate for the subject's LIHTC units will be analyzed. The capture rate is defined as *the estimated percentage of the total potential market for a type of property that is currently absorbed by existing facilities or is forecast to be absorbed by proposed facilities.*

The capture rates are based on one to three person households with a maximum income of 60% of the Median Family Income. The lower limit is set by calculating the rent plus utilities for a year and dividing that by 45%. This result is the minimum amount of income required. Under the rent level currently proposed by the developer, the "minimum" income qualifying level is calculated as follows:

$$\begin{aligned} & \text{(Monthly Rental Rate x 12 months/year)} \\ & \div \text{The PHFA maximum rent factor of 45\%} \\ & \text{Equals } \mathbf{\text{The Minimum Income Qualifying Level}} \end{aligned}$$

The following chart exhibits the minimum qualifying income for each LIHTC unit type within the subject's project:

<b>Assumptions:</b>	
Subject's # of Proposed 1 bedroom Units	45
Proposed 1 bed rent	\$ 745
Utility Allowance	\$ 142
1 bed Minimum Income (@ 45%)	\$ 23,653
1 bed Maximum Income (@ 60%)	\$ 35,490
<b>Assumptions:</b>	
Subject's # of Proposed 2 bedroom Units	5
Proposed 2 bed rent	\$ 886
Utility Allowance	\$ 179
2 bed Minimum Income (@ 45%)	\$ 28,400
2 bed Maximum Income (@ 60%)	\$ 42,600

Subject's # of Proposed Units (All Units)	50
Proposed 1 bed rent	\$ 745
Utility Allowance	\$ 142
1 bed Minimum Income (@ 45%)	\$ 23,653
2 bed Maximum Income (@ 60%)	\$ 42,600

The total income eligible households within the area divided by the number of units proposed for the subject yielded the following capture rates without consideration of the competition.

Additionally, we analyzed the impact on the capture rate utilizing the competing LIHTC units identified in the primary market area. As such, (5,530) units for general occupancy in the defined area represent the total competition; of which there are (1,853) one-bedroom units and (1,182) two-bedroom units within the primary market area (3,035 total 1 & 2-bedroom units). The capture rate is shown as follows with competition:

<b>Capture Rate Analysis for the LIHTC Units @ 60% GMFI</b>							
Year	Total Households	Income Eligible Renter Households	All Units (Aged 62+)		Eligible Households as a % of Total Area	Estimated Capture Rate	Capture Rate With Competition
			Income Eligible Homeowner Households	Total Income Eligible Households			
2006-2010 (Avg.)	16,533	2,820	2,273	5,093	30.8%	0.98%	2.43%
2014	17,777	2,809	2,458	5,268	29.6%	0.95%	2.24%
2019	19,477	2,804	2,661	5,464	28.1%	0.92%	2.06%

As a rule of thumb, capture rates of less than 10% without consideration of competition are generally considered favorable. Considering the subject's competitive advantage (as newly constructed units,) attracting this portion of available demand should be readily achievable. In addition, it is highly likely the project will draw from other areas of the city.

6. **Interview and/or survey neighborhood groups, grassroots organizations, local community development corporations, potential tenant populations, and local government officials to determine support, interest and/or opposition to the proposed development, as well as identifying other proposed housing for the area. List all people interviewed, including phone numbers, and discuss the comments received below:**

**Interviewed/Surveyed Persons**

- Curtis Jones Jr. – Councilman  
City of Philadelphia  
215-686-3416
  
- Gerald Murphy, Director  
Wynnefield-Overbrook Revitalization Corporation  
610-660-1256
  
- Gary Jastzrab, Community Planning  
Philadelphia City Planning Commission  
215-683-4615
  
- Wanda Staples  
Wynnefield Residence Association  
215-878-0571

All of the above individuals or organizations were very supportive of the subject's proposed project, especially since the project proposes new units of more modern housing with good overall appeal. I am unaware of any opposition to the project.

7. **Analyze the suitability of the site for the subject development including accessibility to employment and services and its compatibility with surrounding uses, including economic benefits to the area and/or the proposed residents.**

**Analysis of Subject's Site**

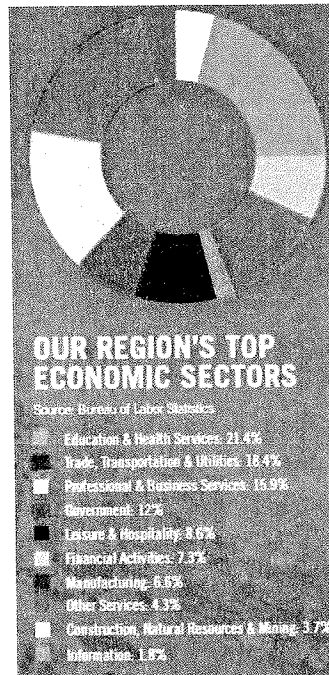


**Employment Data**

The entire region's economy is largely dependent upon City of Philadelphia and is part of the Philadelphia metropolitan area. The region offers many diversified employment opportunities for residents in services, high-tech, and other areas. The largest employers within the county are distributed as follows:

<b>Philadelphia County's Largest Employers</b>	
<b>Industry</b>	<b>Total Employed</b>
School District of Philadelphia	26,000+/-
Jefferson Health Systems	19,100+/-
University of Pennsylvania	16,160+/-
University of Pennsylvania Health System	14,941+/-
UPS	10,261+/-
Comcast/Spectacor	10,200+/-
Aramark Corp.	10,026+/-
Children's Hospital of Philadelphia	9,800+/-
SEPTA	8,800+/-
Temple University	7,804+/-
Temple University Health System	7,500+/-
U.S. Airways	6,247+/-
Independence Blue Cross	5,230+/-
Drexel University	5,122+/-

*Source: SelectGreaterPhiladelphia.com*



The largest industries in terms of employment are education, health care, and transportation. The Health Care and Social Assistance Industry includes the most significant employment in the region. The table below, from the DVRPC indicates that the County of Philadelphia should anticipate a 3% increase in employment from the year 2010 to 2020.

*Table 1: Employment Forecasts 2000 to 2030*

County	2000	2005	2010	2015	2020	2025	2030	Absolute Change 2000-2030	Percent Change 2000-2030
Bucks	267,124	274,603	292,453	307,075	320,280	335,973	362,772	95,648	32.1%
Chester	238,641	248,187	270,523	289,731	305,086	324,002	345,062	106,421	44.6%
Delaware	238,164	242,213	251,901	258,958	265,787	269,370	273,411	35,247	14.8%
Montgomery	492,677	504,009	531,225	547,162	563,029	579,920	597,300	104,623	21.2%
Philadelphia	741,397	726,569	726,205	733,468	748,136	755,621	763,176	21,779	2.9%
<b>5-County PA Total</b>	<b>1,978,003</b>	<b>1,995,581</b>	<b>2,072,307</b>	<b>2,136,394</b>	<b>2,202,310</b>	<b>2,264,886</b>	<b>2,331,721</b>	<b>353,718</b>	<b>17.9%</b>
Burlington	202,535	207,598	216,940	223,882	230,375	240,051	249,653	47,118	23.3%
Camden	216,931	217,083	220,330	226,509	230,586	233,122	235,453	18,522	8.5%
Gloucester	99,467	104,142	114,452	119,124	123,485	129,168	135,627	36,160	36.4%
Mercer	209,758	214,833	226,991	237,743	244,876	253,066	258,818	49,060	23.4%
<b>4-County NJ Total</b>	<b>728,691</b>	<b>743,656</b>	<b>778,722</b>	<b>807,258</b>	<b>829,322</b>	<b>855,407</b>	<b>879,551</b>	<b>150,860</b>	<b>20.7%</b>
<b>9-County Region</b>	<b>2,706,694</b>	<b>2,739,237</b>	<b>2,851,029</b>	<b>2,943,652</b>	<b>3,031,640</b>	<b>3,120,293</b>	<b>3,211,272</b>	<b>504,578</b>	<b>18.6%</b>

Source: Delaware Valley Regional Planning Commission, March 2005.

The surrounding areas are projected to have a more significant employment growth than Philadelphia over the period of analysis 2005 to 2035. However, many of these surrounding areas have a greater potential for growth than the City, which is largely built out. As shown in the chart, Philadelphia has a much larger employment base to begin with. In addition, public transportation is available for residents for commuting as well as a strong highway network.

**Schools**

The primary market area is serviced by the Philadelphia School District. This district offers High Schools, Middle/Elementary Schools, and preschools. The District consists of 176 Elementary Schools, 29 Middle Schools and 62 High Schools as well as 17 Alternative Education Schools and 28 Privately Managed Schools. The following is a list of public schools within the area surrounding the project.

The following is a list of public schools within the area surrounding the project.

**Philadelphia School District**

School
Samuel Gompers Elem. School
William B. Mann Elem. School (Charter)
Dimner Beeber Middle School
Overbrook High School

Wynnefield Academy (Private)

Woodbine Academy (Private)

Saint Rose Lima Catholic School (Private)

### **Supporting Facilities**

There are various supporting uses within the area. The following table identifies the subject's proximity to other nearby positive land uses.

<b>Name</b>	<b>Facility</b>	<b>Address</b>	<b>Distance</b>
Playgrounds	Tustin Recreation Center	6006 W. Columbia Ave.	0.6 mi.
Parks	Fairmount Park	N. Parkside Ave.	0.4 mi.
Fitness Center	I Am Fitness	4950 Wynnefield Ave.	0.5 mi.
Supermarket	Acme	121 E. City Ave.	1.5 mi.
Shopping	Target	4000 Monument Rd.	1.7 mi.
Library	Free Library of Phila	N. 52 <sup>nd</sup> & Media St.	0.8 mi.
Library	Free Library of Phila	5325 Overbrook Ave.	0.6 mi.
Public Health Centers	Pcom Geriatric Center	4190 City Ave.	1.4 mi.
Senior Center	Philadelphia Senior Center (Main Branch)	509 South Broad Street	4.5 mi.
Senior Center	Golden Slipper Center for Seniors	3901 Conshohocken Ave.	1.7 mi.
University	Saint Joseph's	City Ave.	0.6 mi.
Public Schools (Major)	Overbrook High School	5898 Lancaster Ave.	0.5 mi.
Hospital	Christ Church Hospital	2100 N. 49 <sup>th</sup> St.	0.6 mi.
Hospital	Lankenau Hospital	100 E. Lancaster Ave.	1.5 mi.
Municipal Building	City Hall	Broad and Market Streets	4.4 mi.
Police Station	Wynnefield Neighborhood	2201 Belmont Ave.	0.9 mi.
Bus Stops		54 <sup>th</sup> & Berks Streets	0.1 mi
Train Station	SEPTA – Cynwyd Line	Wynnefield Avenue	0.4 mi.
400overbrooFood Store	Frank & Franks Grocery Store	1903 N. 54 <sup>th</sup> Street	0.4 mi.
Food Store	Produce Junction	2241 Bryn Mawr Ave.	0.4 mi.
Pharmacy	Wynnefield Pharmacy	1901 N. 54 <sup>th</sup> St.	0.1 mi
Pharmacy	Overbrook Pharmacy	5610 Lancaster Ave.	0.5 mi

## J. McHale & Associates, Inc.

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Religious (Church)	Pinn Memorial Baptist Church	5398 Wynnefield Ave.	0.3 mi
Religious (Church)	St. Barbara's Church	5359 Lebanon Ave.	0.1 mi.
Misc.	Bala Theater	157 Bala Ave.	1.2 mi.
Misc.	Dunkin Donuts	1501 N. 52 <sup>nd</sup> St.	0.7 mi.
Misc.	Family Dollar	5648 Lancaster Ave.	0.5 mi.
The Shoppes at 54 <sup>th</sup> St.	Pete's Pizza Hong Kong Restaurant Morgan's Fruits & Vegetables	54 <sup>th</sup> and Arlington Sts.	0.1 mi.

In addition to the aforementioned supporting uses within the area, seniors are provided additional support through the Philadelphia Corporation for Aging (PCA). The PCA contracts with other community organizations to provide a number of services for older people or people with disabilities including senior centers, care at home services, legal assistance, transportation and home delivered meals. The following table identifies some of the programs provided to seniors in the area:

### **Emergency Resources**

--- Programs available include crime victims assistance, providing financial and emotional support, food assistance including food cupboards, food banks and low income government assistance, homeless shelters and utility assistance.

### **Home Based Care**

--- Services to support a person's ability to remain at home include home delivered meals, personal care, nursing care, companionship, physical and occupational therapy, home modifications, transportation and adult day services.

### **Protective Services**

--- The Older Adult Protective Services Department provides resources to intervene in cases of abuse, abandonment, neglect or financial exploitation.

### **Behavioral and Mental Health Services**

--- Variety of services including an outreach and assessment program, outpatient counseling, in-home behavioral health care, and memory disorder assessment centers.

### **Adult Day Services**

--- Non-residential facilities for those who cannot remain safely at home or are isolated at home. Typically includes personal care, recreational activities, counseling and social services, medical support and transportation.

### **Legal Issues**

--- Three legal agencies are contracted through the Philadelphia Corporation for Aging to provide legal services for individuals over 60.

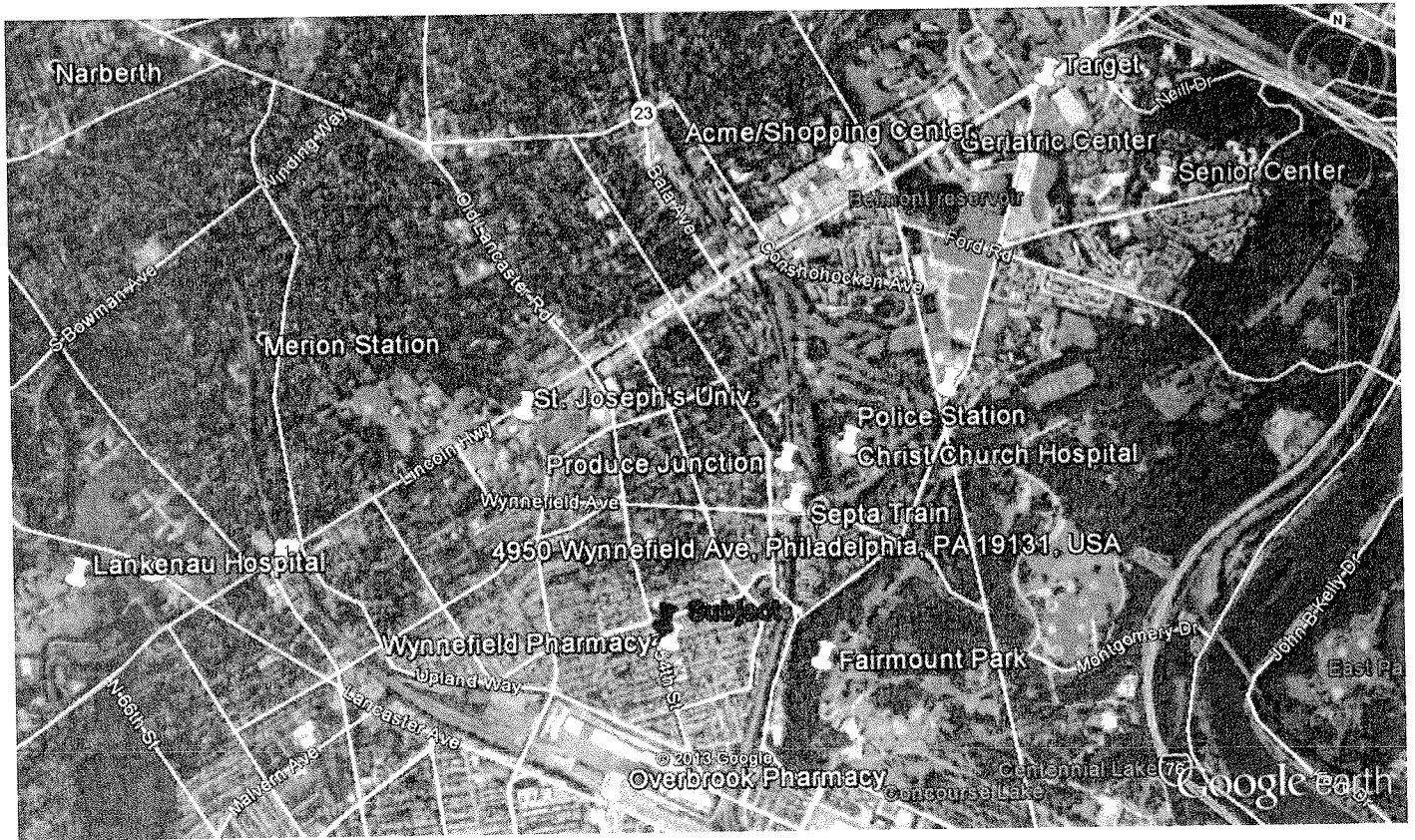
### **Insurance and Benefits**

--- Counseling is available through the APPRISE program to answer questions about insurance and benefits.

### **Transportation**

--- Various discount and benefit programs include free rides and fare discounts on public transportation, medical transportation, special services for those unable to use public transportation and insurance discounts.

The following maps illustrate local public schools, universities, hospitals, police offices, and fire stations.



## **Transportation Data**

The region is served by an extensive network of highways and bridges which provide good access to most portions of Pennsylvania, New Jersey and the eastern seaboard. Major highways throughout the County include Interstate 95, the Pennsylvania, Interstate 676 & 76 (*the Schuylkill Expressway*), US Route 1 (*Roosevelt Boulevard*) & 13, State Routes 30, 611, & 232.

Freight rail service has been available throughout the region since the last century and commuter train service is available via the Septa and PATCO High-Speed services. This commuter rail service is currently available throughout most portions of the County. Public bus service is available throughout the County and region. Major air service is available at the Philadelphia International Airport within a 10-minute drive of most portions of the County.

Overall, the subject is located in a reasonably desirable residential neighborhood in close proximity to the downtown Center City district of Philadelphia. The surrounding neighborhood offers a number of employment opportunities and commercial uses. Residences and commercial buildings in the neighborhood are typically in average condition. The city has demonstrated some signs of renewal, with positive factors include the following:

- ✦ Independence Mall revitalization (Liberty Bell and Independence Hall)
- ✦ SugarHouse Casino opened along the Delaware River in September 2010. The first phase of the project includes the casino floor, retail and dining space and a parking garage. Future phases of the project include a 500 room hotel, 30,000 SF event center and expanded retail and dining facilities.
- ✦ Foxwood Casino has partnered with Harrah's Entertainment to develop their long delayed casino project in the City.
- ✦ 10 Rittenhouse, a 135-unit luxury building opened in late 2009. The 33 story, \$300 million project features one, two and three bedroom homes with a fitness center, lap pool, outdoor terraces and gardens and a private parking garage and valet services.
- ✦ 1706 Rittenhouse opened May 2010. This luxury high-rise condominium building houses one residence priced beginning at \$4 million. The building was half sold out before construction was completed.
- ✦ A 54-unit, \$10.5 million renovation of an apartment building in the Tioga section of the City. The project was developed by Project HOME, a nonprofit group that caters to helping the homeless. Of the units, 15 will be set aside for homeless veterans, 14 for low income applicants, and 25 for homeless adults successfully managing mental illness or substance abuse problems.
- ✦ The City of Philadelphia's Neighborhood Stabilization Program tams the City with developers to acquire foreclosed properties, renovate them and sell them to new occupants.
- ✦ Construction of Dilworth Plaza, which sits above the intersection of SEPTA's Market-Frankford elevated line and Broad Street subway and Subway-Surface Trolley

lines. The project will create a pedestrian friendly public space, and will include a café, winter ice-skating and room for outdoor concerts and events. Construction is estimated to create more than 1,000 jobs.

- ✦ The Pennsylvania Convention Center expansion is completed and has increased the meeting and exhibit space by almost 60%.
- ✦ The Drexel Convenient Care Center opened in early 2010 in Center City. The walk in center provides basic medical care and is geared toward busy working professionals, residents and visitors.
- ✦ Employment districts within close proximity and easily accessible via public transportation.
- ✦ Thomas Jefferson University Hospital is undergoing a \$60 million expansion project including a new 11-story building on Walnut Street, the renovation of the adjacent building housing their outpatient neurological care and the construction of a bridge connecting the new building to their building across Walnut Street. They are also in the planning stages of a new 240,000 SF ambulatory-care center.
- ✦ The City is adding more tourist attractions with the planned openings of the National Museum of American Jewish History (November 2010), the President's House on Independence Mall (December 2010) and the Barnes Foundation on the Benjamin Franklin Parkway (2011).
- ✦ The Hotel Palomar opened in 2009 in Rittenhouse Square. The hotel features 235 rooms and received LEED (Leadership in Energy and Environmental Design) certification from the U.S. Green Building Council.
- ✦ Construction is underway in the Northern Liberties Section of the City on The Shops at Schmidts, a 100,000 SF, 2-story supermarket anchored retail structure with 160 parking spaces. The Residences at Schmidts is also planned, featuring three buildings with 600 new residential units surrounding a one acre park. These are the final phases of Town Investments project that includes the Piazza at Schmidts.
- ✦ Brandywine Realty Trust is planning the construction of Cira Center South. The property will include two towers featuring 23 floors of office space, a 250 unit hotel, 150 residential rental units, 50 residential condominiums, 20,000 SF of restaurant and retail space, and a 2,400 car parking garage. Phase the garage is under construction while the office and residential towers are planned for 2012.
- ✦ \$118 million conversion of Terminal B & C at the Philadelphia International Airport. It includes 45,000 SF retail gallery, 5,000 foot commuter runway, 500 foot ticket pavilion and 750 foot baggage claim facility.



Therefore, it is anticipated that the new housing will be a positive influence to the neighborhood and its residences, as well as to the City.

- 8. Complete the first section of the attached Housing Providers Needs Assessment Form and forward it to the Executive Director of the appropriate County and/or Local Housing Authority and/or Public Housing Agency serving the market area. The response must be incorporated into your evaluation and attached to this final report. If no response, document the date sent to the Housing Authority.**

### **Local Housing Response**

The Housing Providers Needs Assessment Form was sent to Mr. Kelvin A. Jeremiah, Executive Director of Housing for the City of Philadelphia. Due to time constraints; it has been indicated the authority indicated that the form would not be completed by the application date. However, documentation that the housing authority is aware of the impending project is attached to this report.

- 9. List the name and address of all subsidized housing developments within the primary market area, including current occupancy levels and number of persons on the waiting list. If you are aware of any deviations in the occupancy levels and size of the waiting list in the past 2 or 3 years, please describe.**

### **Subsidized Housing within Market Area**

The supply of subsidized rental housing in the primary market area was determined based upon information provided by the Pennsylvania Housing Finance Agency, which is exhibited within the addenda of this report. Additionally, conversations with knowledgeable individuals revealed occupancy levels and number of persons on waiting lists. The following chart lists the assisted rental housing developments, their occupancy level, and the number of people on their waiting list (if available.)

## J. McHale & Associates, Inc.

Development	Assisted Housing Rental Developments							Zip Code
	Total # of Units	# of 1-bedrm Units	# of 2-bedrm Units	# of 3-bedrm Units	# of 4-bedrm Units	# of 5-bedrm Units	# of 6-bedrm Units	
Woodcrest Housing	11	0	0	8	3	0	0	19131
Neighborhood Restorations XIX	20	1	10	8	1	0	0	19131
Monument Mews	60	27	8	20	5	0	0	19131
Park Tower	157	156	1	0	0	0	0	19131
Kaearsley Care Housing	60	0	0	0	0	0	0	19131
Belmont Specialty Housing	40	0	0	0	0	0	0	19131
Wynnefield Place	48	0	0	0	0	0	0	19131
1670 N. 56th St.	1	0	0	1	0	0	0	19131
Rollie Associates IV	1	0	0	1	0	0	0	19131
Hestonville	24	2	11	11	0	0	0	19131
5414 W. Oxford St.	1	0	0	0	0	0	0	19131
1456 N. 56th St.	1	0	0	1	0	0	0	19131
1521 N. 57th St.	1	0	0	1	0	0	0	19131
Marsco Partnership	4	0	0	3	1	0	0	19131
1437 N. 55th St.	1	0	0	1	0	0	0	19131
1400N. 54th St. Apts.	3	1	2	0	0	0	0	19131
5513 Poplar St.	1	0	0	1	0	0	0	19131
Brooks School Apartments	33	33	0	0	0	0	0	19131
627 N. 57th St.	1	0	0	1	0	0	0	19131
5711 Poplar St.	1	0	0	1	0	0	0	19131
540 N. Allison St.	1	0	0	1	0	0	0	19131
Westminster Apartments	43	6	26	5	0	0	0	19131
Westminster Senior Apartment	41	24	5	0	0	0	0	19131
Help Philadelphia I	40	0	0	40	0	0	0	19131
Help Philadelphia II	50	50	0	0	0	0	0	19131
Pavillion	296	82	0	0	0	0	0	19131

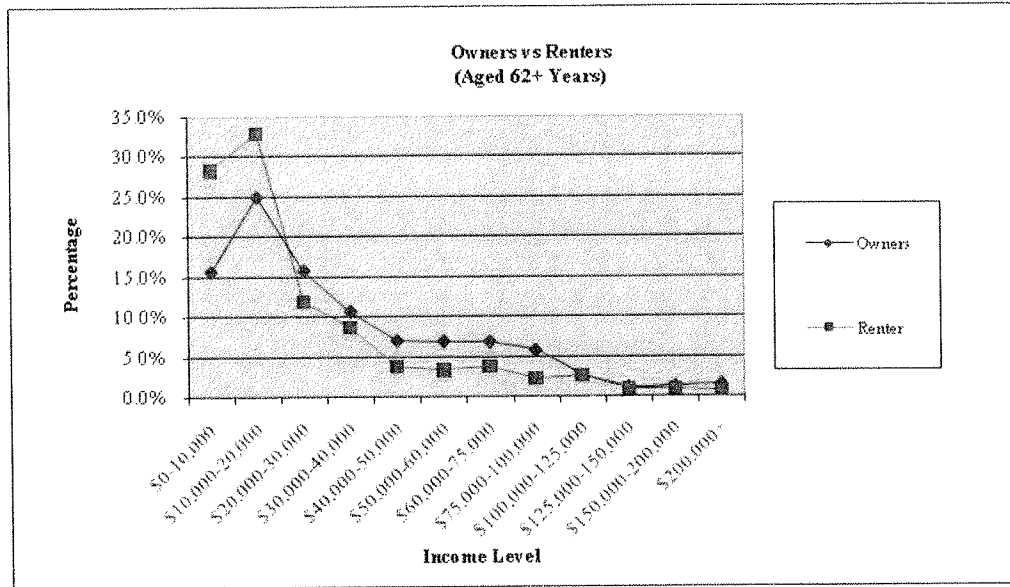
Reportedly, there were not any significant deviations in the occupancy levels and size of the waiting list in the past 2 to 3 years. It appears that all of the subsidized developments for seniors in the Primary Market Area are 100% occupied except for times of turnover. According to the PHFA, there are a total of 5,530 subsidized units throughout primary market area; however there is only (1,853) one-bedroom and (1,182) two-bedroom within the primary market. In addition, there are only 675 subsidized units available to seniors within the subject areas zip code of 19131 of which (88) are currently proposed. The senior units only represent 12% of all the subsidized units within the primary market area.

10. Discuss the availability of affordable housing options including home ownership opportunities for the target population. Describe the age, condition, etc, of housing, and the extent of abandoned housing and other buildings within the primary market area. If possible identify any substandard housing in the primary market area.

### Home Ownership Vs. Rental

Housing options within the area for the target population include mostly older single-family attached housing, circa early 1930's along with mid-rise structures. There are a number of substandard, abandoned, and vacant properties within the primary market area. I am unable to adequately quantify the total number of these substandard units; however, it is likely that due to the age of the dwellings many may have lead base paint and inadequate wiring. Below is a graph

developed from data provided by Ribbon Demographics. This graph demonstrate how home ownership vs renting significantly coincides with the level of income of the age group.



Homeownership is another option for the target population. The existing housing that is available for sale has been analyzed as well as recent transactions of residential dwellings. The following is a five-year trend of residential dwelling sales in the most comparable municipality of the City of Philadelphia.

<b>Trend MLS – Market Statistics</b>			
<b>Average Sale Prices</b>			
	<b>19131 Zip Code</b>		<b>Entire City</b>
	<u>Minimum</u>	<u>Average</u>	<u>Average</u>
10/2013 Thru 9/2014	\$5,000	\$97,238	\$207,764
10/2012 Thru 9/2013	\$7,900	\$96,695	\$199,964
10/2011 Thru 9/2012	\$9,000	\$97,783	\$180,020
10/2010 Thru 9/2011	\$5,500	\$102,306	\$179,971
10/2009 Thru 9/2010	\$6,500	\$101,064	\$180,162
10/2008 Thru 9/2009	\$11,000	\$104,091	\$179,177

The City Line Avenue area has a significant impact on the subject neighborhood due to its close proximity. For the target income population, it is likely that gathering the down payment for homeownership and the other cost burdens associated with homeownership would be financially onerous.

The subject will be a new product and will be far superior in condition and amenities to much of the existing housing stock. Therefore, it is considered a good alternative to homeownership, which could be financially burdensome due to the age of the housing stock.

11. Discuss the short and long-term impact that the subject development may have on existing and/or proposed affordable market rate, Tax Credit, and subsidized housing located within the primary market area including the information provided in the PHFA Housing Inventory Request Form. Identify the current occupancy and number of persons on the waiting list for these properties.

### **Impact on Existing Market**

After analysis of the proposed project, I do not anticipate that this project will have any adverse impact on existing affordable, market-rate, tax credit, or subsidized housing in the primary market area. The Inventory of Assisted Rental Housing from the Pennsylvania Housing Authority for the subject's zip code is listed on page 35. However, there are a total of 5,530 subsidized units throughout primary market area; (1,853) one-bedroom and (1,182) two-bedroom within the primary market. In addition, there are only 675 subsidized units available to seniors within the subject areas zip code of 19131 of which (88) are currently proposed. The senior units only represent 12% of all the subsidized units within the primary market area.

12. List market rental comparables (no income restrictions) within the Primary Market Area. Do not use rent subsidized developments. Attach a color photo of each comparable. A minimum of three comparables should be submitted. If comparables cannot be located, a thorough explanation must be provided and report what type of rental housing is available in the market.

### **Market Rent Comparables within Primary Area**

**COMPARABLE HOUSING SURVEY FORM**

Date: 11/14/2014  
 Name of Property: Comparable Rental #1 – Penn Wynn House  
 Address: 2201 Bryn Mawr Ave., Philadelphia, PA, 19131  
 Distance From Subject Property: 2,030 Ft.  
 Is it within Primary Market Area: X Yes        No  
 Building Type:        Walk-up        Row/Townhouse X Elevator  
 Age of the property: 50 years +/-  
 Contact: Property manager  
 Telephone No. of Contact: (215) 878-8950

	Type (gas, elec., etc.)	Incl. in Rent	
		Yes	No
Heat	Electric	X	
Water	Public	X	
Hot water	Gas	X	
Sewer	Public	X	
Cooking	Gas	X	
A/C	Yes		X
Unit lighting	Electric		X

**List the appliances provided within the unit:**

Refrigerator, stove, and dishwasher are provided.

Central laundry facilities

<u>Number of Units</u>	<u>Number of Bdrm/Bath</u>	<u>Square Feet</u>	<u>Rent</u>	<u>Occupancy %</u>	<u>Number on Waiting List</u>
	Studio	350-375 +/-	\$550-\$600	N/A	
	1/1	700-750 +/-	\$750-\$850	N/A	
	2/1-2	870-980 +/-	\$950-\$1,050	N/A	
232				92%	

**Identify any special characteristics or amenities of the comparables:** Elevator served building with some garage parking. Some units include balconies.



**COMPARABLE HOUSING SURVEY FORM**

Date: 11/14/2014  
 Name of Property: Comparable Rental #2 – Westfield Apartments  
 Address: 2237 Bryn Mawr Ave., Philadelphia, PA, 19131  
 Distance From Subject Property: 2,080 Ft.  
 Is it within Primary Market Area: X Yes        No  
 Building Type:        Walk-up        Row/Townhouse X Elevator  
 Age of the property: 53 years +/-  
 Contact: Galman Group  
 Telephone No. of Contact: (215) 879-3571

	Type (gas, elec.,etc.)	Incl. in Rent	
		Yes	No
Heat	Gas		X
Water	Public	X	
Hot water	Gas		X
Sewer	Public	X	
Cooking	Gas		X
A/C	Yes		X
Unit lighting	Electric		X

**List the appliances provided within the unit:**  
Refrigerator, stove, garbage disposal and dishwasher are provided.  
On-site laundry facilities  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

	<u>Number of Units</u>	<u>Number of Bdrm/Bath</u>	<u>Square Feet</u>	<u>Rent</u>	<u>Occupancy %</u>	<u>Number on Waiting List</u>
14		Studio	400 +/-	\$760	N/A	
26		1/1	665 +/-	\$900	N/A	
13		2/2	945 +/-	\$1,000	N/A	
53					96%	

**Identify any special characteristics or amenities of the comparables:** Elevator served building with some assigned cover parking. Some units include balconies.



**COMPARABLE HOUSING SURVEY FORM**

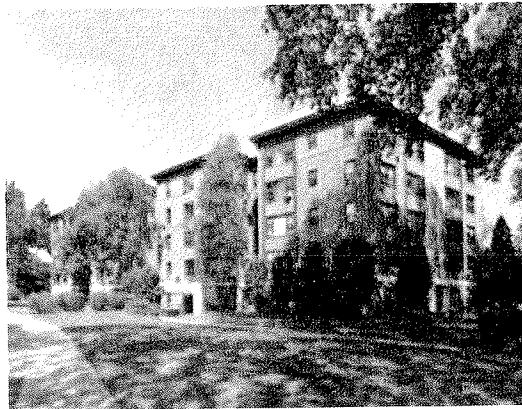
Date: 11/14/2014  
 Name of Property: Comparable Rental #3 – Fairview Arms  
 Address: 5201-5219 Wynnefield Ave., Philadelphia, PA, 19131  
 Distance From Subject Property: 2,100 Ft.  
 Is it within Primary Market Area: X Yes        No  
 Building Type:        Walk-up        Row/Townhouse   X   Elevator  
 Age of the property: 85 years +/-  
 Contact: Woodward Properties  
 Telephone No. of Contact: (215) 473-4803

	Type (gas, elec.,etc.)	Incl. in Rent	
		Yes	No
Heat	Electric	X	
Water	Public	X	
Hot water	Electric	X	
Sewer	Public	X	
Cooking	Electric	X	
A/C	Yes		X
Unit lighting	Electric		X

**List the appliances provided within the unit:**  
Stove, microwave, and refrigerator.  
On-site laundry facility  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

<u>Number of Units</u>	<u>Number of Bdrm/Bath</u>	<u>Square Feet</u>	<u>Rent</u>	<u>Occupancy %</u>	<u>Number on Waiting List</u>
47	1/1	600+/-	\$795	96%	

**Identify any special characteristics or amenities of the comparables:** Elevator served building with some on-site parking.



**COMPARABLE HOUSING SURVEY FORM**

Date: 11/14/2014  
 Name of Property: Comparable Rental #4 – Wynmawr Court Apartments  
 Address: 5001-5019 Gainor Rd., Philadelphia, PA, 19131  
 Distance From Subject Property: 1,850 Ft.  
 Is it within Primary Market Area: X Yes        No  
 Building Type: X Walk-up        Row/Townhouse        Elevator  
 Age of the property: 63 years +/-  
 Contact: Woodward Properties  
 Telephone No. of Contact: (215) 473-4803

	Type (gas, elec.,etc.)	Incl. in Rent	
		Yes	No
Heat	Bsbd.	X	
Water	Public	X	
Hot water	Gas	X	
Sewer	Public	X	
Cooking	Electric	X	
A/C	Yes		X
Unit lighting	Electric		X

**List the appliances provided within the unit:**  
Stove, microwave, and refrigerator.  
On-site laundry facility  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

<u>Number of Units</u>	<u>Number of Bdrm/Bath</u>	<u>Square Feet</u>	<u>Rent</u>	<u>Occupancy %</u>	<u>Number on Waiting List</u>
12	Studio	350 +/-	\$575	N/A	
12	1/1	550 +/-	\$725	N/A	
<u>11</u>	2/2	850 +/-	\$825-\$895	N/A	
35				94%	

**Identify any special characteristics or amenities of the comparables:** Garden-style apartments with on-site parking.





**COMPARABLE HOUSING SURVEY FORM**

Date: 11/14/2014  
 Name of Property: Comparable Rental #5 – Overbrook Garden Apartments  
 Address: 900 N. 63<sup>rd</sup> St., Philadelphia, PA, 19131  
 Distance From Subject Property: 5,000 Ft.  
 Is it within Primary Market Area: X Yes        No  
 Building Type: X Walk-up        Row/Townhouse        Elevator  
 Age of the property: 85 years +/-  
 Contact: Property Manager  
 Telephone No. of Contact: (215) 771-1036

	Type (gas, elec., etc.)	Incl. in Rent	
		Yes	No
Heat	Bsbd.	X	
Water	Public	X	
Hot water	Gas	X	
Sewer	Public	X	
Cooking	Electric	X	
A/C	Yes		X
Unit lighting	Electric		X

**List the appliances provided within the unit:**

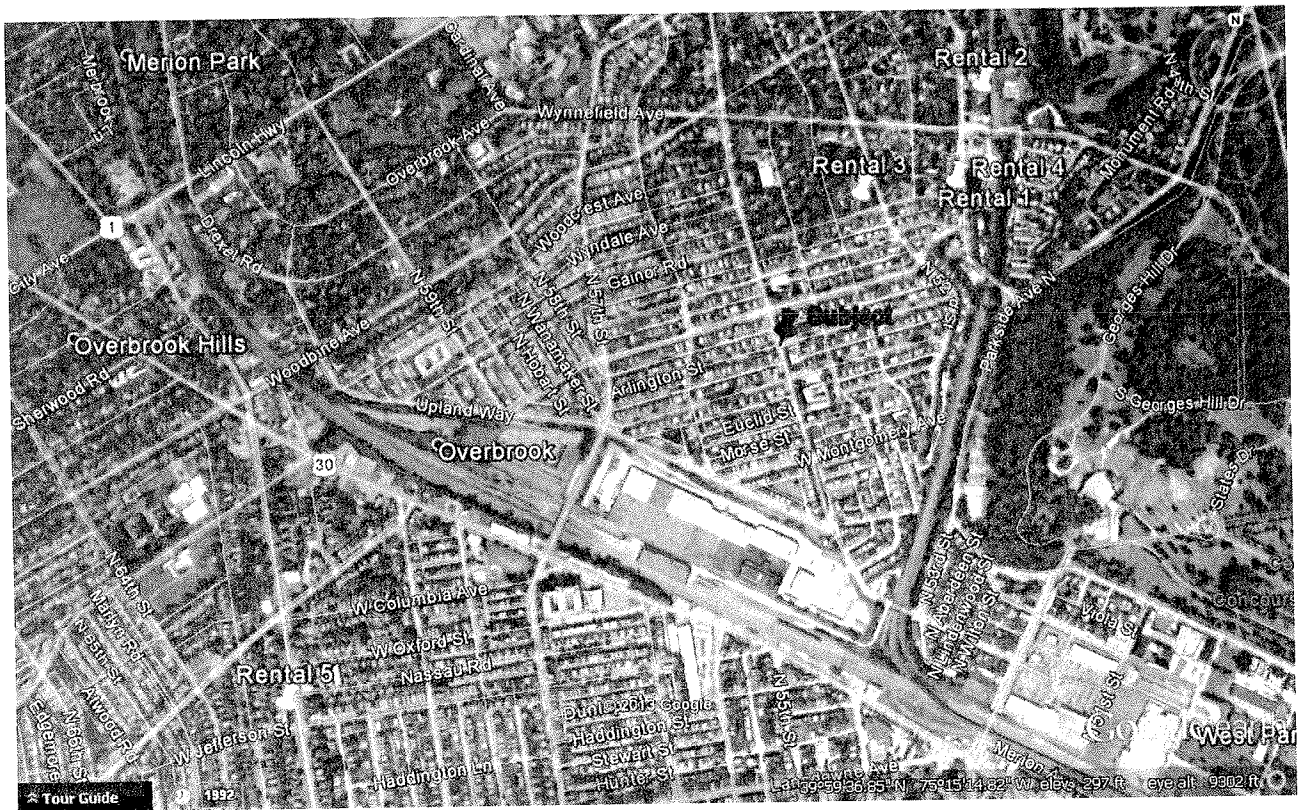
Stove and refrigerator.  
On-site laundry facility  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

<u>Number of Units</u>	<u>Number of Bdrm/Bath</u>	<u>Square Feet</u>	<u>Rent</u>	<u>Occupancy %</u>	<u>Number on Waiting List</u>
23	Studio	600+/-	\$725-\$795	N/A	
23	1/1	750 +/-	\$825-\$895	N/A	
<u>23</u>	2/2	850 +/-	\$1,050	N/A	
69				100%	

**Identify any special characteristics or amenities of the comparables:** Elevator served building.



Comparable Market Rentals Location Map



**Comparable Rentals Adjustment Grids**

<b>1 Bedroom Units</b>						
<b>Market Rate Competition</b>						
	<b>Subject</b>	<b>Rental 1</b>	<b>Rental 2</b>	<b>Rental 3</b>	<b>Rental 4</b>	<b>Rental 5</b>
Unadjusted Rent/Month	N/A	\$800	\$900	\$795	\$725	\$860
Location	Average	Superior	Superior	Superior	Superior	Superior
Adjustment	N/A	-10%	-10%	-10%	-10%	-15%
Eff. Age/Condition	New/Rehab	Inferior	Inferior	Inferior	Inferior	Inferior
Adjustment	N/A	15%	15%	15%	15%	15%
Tenant Paid Utilities	Elect/Heat	Electric	Elect/Heat	Electric	Electric	Electric
Adjustment	N/A	-5%	0%	-5%	-5%	-5%
Unit Size	688 SF Avg.	725 SF	665 SF	600 SF	550 SF	750 SF
Adjustment	N/A	0%	0%	5%	5%	0%
Bath Count	1 bath	Comp	Comp	Comp	Comp	Comp
Adjustment	N/A	0%	0%	0%	0%	0%
Unit Amenities	Avg/Good	Inferior	Inferior	Inferior	Inferior	Inferior
Adjustment	N/A	5%	5%	5%	10%	10%
Net- Other Adjustments	N/A	5%	10%	10%	15%	5%
<b>Adjusted Rent/Month</b>		<b>\$840</b>	<b>\$990</b>	<b>\$875</b>	<b>\$834</b>	<b>\$903</b>
<b>Summary of Market Rate Competition:</b>					Average	\$888
					Median	\$875
<b>Market Rent</b>		<b>\$ 875</b>				

2 Bedroom Units Market Rate Competition						
	Subject	Rental 1	Rental 2	Rental 3	Rental 4	Rental 5
Unadjusted Rent/Month	N/A	\$950	\$1,000	\$795	\$860	\$1,050
Location	Average	Superior	Superior	Superior	Superior	Superior
Adjustment	N/A	-10%	-10%	-10%	-10%	-15%
Eff. Age/Condition	New/Rehab	Inferior	Inferior	Inferior	Inferior	Inferior
Adjustment	N/A	15%	15%	15%	15%	15%
Tenant Paid Utilities	Elect/Heat	Electric	Elect/Heat	Electric	Electric	Electric
Adjustment	N/A	-5%	0%	-5%	-5%	-5%
Unit Size	948 SF Avg.	870 SF	945 SF	600 SF/1-bed	850 SF	850 SF
Adjustment	N/A	0%	0%	15%	0%	0%
Bath Count	1 bath	1.5 Baths	2 Baths	Comp	2 Baths	2 Baths
Adjustment	N/A	-2%	-5%	0%	-5%	-5%
Unit Amenities	Avg/Good	Inferior	Inferior	Inferior	Inferior	Inferior
Adjustment	N/A	5%	5%	5%	10%	10%
Net- Other Adjustments	N/A	3%	5%	20%	5%	0%
<b>Adjusted Rent/Month</b>		<b>\$979</b>	<b>\$1,050</b>	<b>\$954</b>	<b>\$903</b>	<b>\$1,050</b>
<b>Summary of Market Rate Competition:</b>					Average	\$987
					Median	\$979
<b>Market Rent</b>		<b>\$</b>	<b>975</b>			

13. Summarize the comparable unassisted market rent for each unit size.

<u>Unit Size</u>	<u>Rent</u>		<u>Tenant Paid Utilities</u>		<u>Adjusted Market Rent</u>
One-bedroom	\$875	+	\$142	=	\$1,017
Two-bedroom	\$975	+	\$179	=	\$1,154
Three-bedroom		+		=	
Four-bedroom		+		=	

14. Compute the Pricing Advantage of the subject development's proposed rents to the Adjusted Market Rent.

Summary Of LIHTC Rent Analysis							
Unit Type	(A) Proposed LIHTC Rents @ GMFI	(B) LIHTC Maximum allowable rents	(C) Proposed Vs. Max  $((B-A)/B)$	(D) Reconciled Market Rate	(E) Utility Allowance	(F) Net Market Rental	(G) Proposed Vs. Market  $((F-A)/F)$
1 Bedroom @ 60%	\$745	\$1,189	-37%	\$875	\$142	\$1,017	-27%
2 Bedroom @ 60%	\$886	\$1,419	-38%	\$975	\$179	\$1,154	-23%

15. For existing facilities applying for preservation funding provide evidence indicating that the development is or is not a likely candidate for converting to a market rate rental development that may not be affordable to the existing residents. Factors to consider include, but are not limited to, demand for or waiting list of market rate units within the primary market area, significant increases in rents at other market rate properties, significant increases in median incomes and property values within the primary market area, and the development's location or proximity to new economic development which is creating higher than average new employment opportunities.

Not Applicable

16. Based on the aforementioned information, discuss your support for the proposed development or provide recommendations and/or suggest modifications. This should include your conclusion regarding the need and marketability of the proposed housing. Also, estimate the absorption period and ongoing vacancy rate for the proposed housing based upon comparables and/or housing experience.

Based upon my analysis of the subject and current market conditions, I anticipate that the subject will perform exceptionally well in its primary market area. There is a strong demand and limited supply for quality affordable housing in this area. The rehabilitated construction of the units will allow the subject to compete well with the existing and proposed stock of housing.

The subject site has average to good access to major routes of transportation, employment centers, shopping, and other services. Bus service is available in close proximity. The proposed rental rates are below market, which will attract potential renters. Based upon conversations with various parties involved in the community and housing within the primary market area, this type of quality housing is needed. There is substantial community support for this project.

Based on this information and other information researched during the analysis, the following conclusions have been made:

**Positive Factors of the Proposed Project:**

- As proposed, the units will offer large units with desirable modern features and amenities.
- The public housing waiting lists demonstrate a strong need for quality affordable housing within the primary market area.
- The project area is part of the Wynnefield-Overbrook Redevelopment Plan.
- The base rental rates for comparable market rent complexes were above the proposed LIHTC rates. The good overall condition of the subject would enable it to command rental rates near the high end of the typical market level.
- Vacancy within the market is minimal.
- Stable to slightly increasing rates are anticipated.
- The rehabilitated/new construction will make the subject attractive to the typical resident.
- There appears to be a sufficient market demand for subsidized complexes especially for the LIHTC product.
- With limited new construction coming online, a demand for newer quality housing continues to exist.
- There are an adequate number of income-qualified residents in the primary market area to support the proposed project.

- Capture rate is favorable with and without competition.
- The project is considered a good alternative to homeownership, which could be financially burdensome due to the age of the housing stock and the additional fallout from the collapse of the sub-prime mortgage market.
- Accessible via public transportation to the various employment areas within the city.
- Local shopping is within close proximity of the subject.

**Negative Factors of the Proposed Project:**

- Urban area with relatively poor economic conditions and high crime in surrounding area.
- The neighborhood is in need of rehabilitation of the existing housing stock, since most of it is older and in need of repairs.

**Absorption**

The prevailing reported rate of vacancy amongst the primary market rate competition is from 0% to 6% and has been steady during the past several years. Generally, turnover/absorption has been reported at 2 to 15 units per month for the larger market rate projects, while the many subsidized housing facilities report large waiting lists. The primary factor influencing absorption rates in the market appears to be the competitive rental rates being offered by the respective project under lease-up. From our survey, it has been observed that a lack of quality affordable housing exists in the market and that a significant supply of income eligible residents exists.

In light of this information and considering the new/rehabbed condition, large unit sizes, and modern amenities to be provided at the subject, the subject project could likely expect to achieve an absorption pattern of 10 to 14 units per month for the project. Therefore, the absorption period for the subject project is calculated as follows:

<b>Calculation of Absorption Period</b>				
<b>A</b>	<b>B</b>	<b>C</b>	<b>(A/C)</b>	<b>(A/B)</b>
<b># of Units Proposed</b>	<b>Min. Units Per Month</b>	<b>Max. Units Per Month</b>	<b>Calculated Min. Absorption Period (Months)</b>	<b>Calculated Max. Absorption Period (Months)</b>
50	10	14	3.6	5.0

**Conclusions of the Market Assessment**

In conclusion, the proposed project will enhance the appeal of the neighborhood. The proposed rehabilitation of the units will enable the project to compete with more modern units and command rental rates at the upper end of the market. Based upon supply and demand for such units and current market conditions, the subject should be absorbed quickly and maintain a high level of occupancy.

**Submitted by:**

November 17, 2014  
**Date**

Jerome J. McHale, MAI  
**Name (type or print)**

President  
**Title**

J. McHale & Associates, Inc.  
**Firm**

693 Main Street,  
Building C; 2<sup>nd</sup> Floor  
Lumberton, NJ 08048  
**Address**

609-914-4679  
**Phone Number**

609-914-0079  
**FAX Number**

jmchale@jmchaleassoc.com  
**Email**



## Certification

I certify that, to the best of my knowledge and belief:

- ◆ The statements of fact contained in this report are true and correct.
- ◆ The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, unbiased professional analyses, opinions, and conclusions.
- ◆ I have no present or prospective interest in the property that is the subject of this report, and I have no personal interest or bias with respect to the parties involved.
- ◆ My compensation is not contingent on an action or event resulting from the analyses, opinions, or conclusions in, or the use of, this report.
- ◆ My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice (USPAP)*.
- ◆ The use of this report is subject to the requirements of the Appraisal Institute, with which I am affiliated, relating to review by its duly authorized representatives.
- ◆ Kevin McConnell provided data research assistance in the development of this report and accompanied the appraiser during the inspection of the property.
- ◆ I have personally inspected the property that is the subject of this report along with all comparable properties used in the report.
- ◆ I certify that, to the best of my knowledge and belief, the reported analyses, opinions, and conclusions were developed, and this report has been prepared in conformity with the *Uniform Standards of Professional Appraisal Practice (USPAP)* as promulgated by the Appraisal Standards Board of the Appraisal Foundation. In addition, the report is in conformity with the requirements of the *Code of Professional Ethics and Standards of Professional Appraisal Practice* of the Appraisal Institute, with which I am affiliated.
- ◆ As of the date of this report, I have completed the requirements of the Continuing Education Program of the Appraisal Institute and Council of Affordable Housing Market Association.
- ◆ The study is prepared by a certified market analyst and is in compliance with the market study requirements of the National Council of Affordable Housing Market Association.

November 17, 2014  
DATE OF REPORT



Jerome J. McHale, MAI  
Certified General Appraiser  
PA Certified General GA-001359-R  
Certified Member of the National  
Council of Housing Market Analysts

## **Assumptions & Limiting Conditions**

The study is subject to the following assumptions and limiting conditions set forth as follows. Additional assumptions and limiting conditions may be cited elsewhere in the report.

1. To the best of my knowledge, the statements of facts contained in the study, upon which the analysis, opinions and conclusions expressed are based, are true and correct. Information, estimates, and opinions furnished to us and contained in the report or utilized in the formation of the conclusions were obtained from sources considered reliable and believed to be true and correct. However, no representation, liability or warranty for the accuracy of such items is assumed by or imposed on us, and is subject to corrections, errors, omissions and withdrawal without notice.
2. Title is assumed to be good and marketable. The consultant assumes no responsibility for legal matters affecting the property or title, nor does the consultant render any opinion as to the title.
3. The legal description, areas, and dimensions shown within the report are assumed to be correct.
4. No survey of the property has been made by the consultant. Exhibits such as site plans and floor plans are included to assist the reader in visualizing the property, and the consultant assumes no responsibility.
5. Management and ownership are assumed to be competent.
6. Public, industry and statistical information are from sources that I deem to be reliable. However, no representation as to the accuracy or completeness of such information is being made.
7. It is assumed that there is full compliance with all applicable federal, state, and local environmental regulations and laws unless non-compliance is stated, defined, and considered in the study.
8. It is assumed that any mechanical and electrical equipment, which is considered part of the real estate, will be in proper operating condition except when noted herein. These include items such as the heating, air conditioning, plumbing, sprinkler, and electrical systems.
9. It is assumed that all applicable zoning and use regulations and restrictions will be complied with, unless a nonconformity has been stated, defined, and considered in the study.
10. It is assumed that all required licenses, consents or other legislative or administrative authority from any local, state or federal governmental or private entity have been or can be obtained or renewed for the use on which the study is based.
11. The study is to be used in whole and not in part. No part of it shall be used in conjunction with any other study or appraisal unless prepared by J. McHale & Associates, Inc. Furthermore, this report and all conclusions are for the exclusive use of the client and the Pennsylvania Housing & Finance Agency for the sole and specific purpose(s) stated herein.
12. I am not required to give testimony or be in attendance at any court or administrative proceeding with reference to the property, unless arrangements have been previously made.
13. No change of any item of the study shall be made by anyone other than myself, and I shall have no responsibility for any such unauthorized change.

14. Information and estimates provided to me and contained in the report, including but not limited to Site & Construction Plans, Income & Expense Statements, capital expenditures, and repair/remediation estimates, were from sources considered reliable and are believed to be true and accurate.
15. I have not made a specific compliance survey and analysis of this property to determine whether or not it is in conformity with the various detailed requirements of the American with Disabilities Act (*ADA*), which became effective on January 26, 1992. It is possible that a compliance survey of the property along with a detailed analysis of the requirements of the Act could reveal that the property is not in compliance with one or more of the Act's requirements. I consider it imperative that the services of a qualified architect and/or engineer be retained to make such a determination.

### **Hypothetical Conditions/Extraordinary Assumptions**

A Hypothetical Condition is defined as, "*a condition, directly related to a specific assignment, which is contrary to what is known by the appraiser to exist on the effective date of the assignment results, but is used for the purpose of analysis*"<sup>1</sup>

An Extraordinary Assumption is defined as, "*an assumption, directly related to a specific assignment, which, as of the effective date of the assignment results, which if found to be false, could alter the appraiser's opinions or conclusions.*"<sup>2</sup>

The appraised market value is based upon the following Conditions/Assumptions:

1. *The consultant specifically cautions that certain assumptions regarding supply, demand, and achievable rent expectations reflect current market conditions from which the forecasts are made. The consultant cannot be held responsible for unforeseeable events that alter future market conditions.*
2. *The market study assumes that the demographic information utilized from Ribbon Demographics is accurate for the subject's market area. The consultant reserves the right to modify the conclusions if it is found the demographics are found to be incorrect.*

---

<sup>1</sup> *Uniform Standards of Professional Appraisal Practice* as promulgated by the Appraisal Standards Board of the Appraisal Foundation, 2014-2015 Edition.

<sup>2</sup> *Uniform Standards of Professional Appraisal Practice* as promulgated by the Appraisal Standards Board of the Appraisal Foundation, 2014-2015 Edition.

## **Addenda**

-A1-

## Subject Photographs



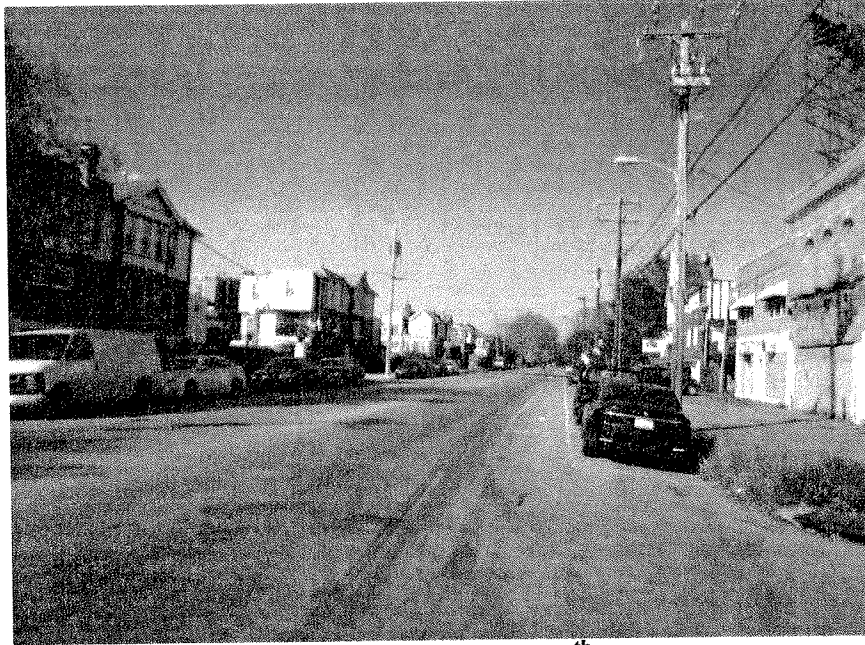
Side View



View of Neighboring Shoppes along N. 54<sup>th</sup> Street

-A2-

**Subject Photographs**



**Northerly View along N. 54<sup>th</sup> Street**



**Easterly View along Arlington Street**

## **Zoning Documentation**

<b>ZONING/USE PERMIT</b>		CITY OF PHILADELPHIA DEPARTMENT OF LICENSES & INSPECTIONS 1401 JOHN F KENNEDY BLVD PHILADELPHIA, PA 19102-1667		PERMIT NUMBER 512247	
SUBJECT TO REVOCATION IF FULL INFORMATION IS MISREPRESENTED OR NOT PROVIDED		FEE \$350.00	DATE 02/11/14		
LOCATION OF WORK: 02001 N 54TH ST PHILADELPHIA, PA 19131-0000 SITE		ZONING CLASSIFICATION CMX-3			
OWNER CITY OF PHILADELPHIA 15TH FLOOR PHILADELPHIA PA, 19102		APPLICANT BALLARD SPAHR ANDREWS INGERSOLL LL 1735 MARKET ST 51ST FLOOR PHILADELPHIA, PA 19103-7501		PLAN EXAMINER PAULOSE ISSAC	
		ZONING BOARD OF ADJUSTMENT DECISION CALENDAR # DATE			
<b>THIS PERMIT DOES NOT AUTHORIZE ANY CONSTRUCTION UNTIL RELATED CONSTRUCTION PERMITS ARE ISSUED</b>					
UNDER REGULATIONS OF THE PHILADELPHIA ZONING ORDINANCE FOR <b>ZONING APPROVAL</b> COMPLETE DEMOLITION OF ALL EXISTING STRUCTURES AND ERECTION OF AN ATTACHED STRUCTURE. SIZE AND LOCATION AS SHOWN ON THE APPLICATION.					
<b>USE REGISTRATION</b> FOR USES, VACANT RETAIL SPACES ON GROUND FLOOR (USES AS PERMITTED IN CMX-3 DISTRICT, USE PERMIT REQUIRED PRIOR TO OCCUPANCY) AND FIFTY-FOUR (54) DWELLING UNITS FOR SENIOR CITIZEN (AT LEAST 80% OF THE UNITS IS RESTRICTED FOR USE BY THOSE 60 YEARS OF AGE OR OLDER) AND ELEVEN (11) OFF STREET INTERIOR PARKING SPACES INCLUDING 2 H/C ACCESSIBLE SPACES AND 18 BICYCLE PARKING.					
SUBJECT TO THE FOLLOWING PROVISOS AS ESTABLISHED BY THE ZONING BOARD OF ADJUSTMENT:					
<b>ANY PERSON AGGRIEVED BY THE ISSUANCE OF THIS PERMIT MAY APPEAL TO THE ZONING BOARD OF ADJUSTMENT (ZBA). FOR INSTRUCTIONS ON FILING AN APPEAL, PLEASE CONTACT THE ZBA AT 215-686-2429 OR 215-686-2430.</b>					
IT SHALL BE THE OWNER'S RESPONSIBILITY TO SECURE THE APPROVAL OF THE PHILADELPHIA HISTORICAL COMMISSION PRIOR TO ANY ALTERATION TO A HISTORIC PROPERTY. TO CHECK THE HISTORIC STATUS OF A PROPERTY, CALL THE PHILADELPHIA HISTORICAL COMMISSION AT 215-686-7660.					
FOR ESTABLISHMENTS THAT PREPARE AND SERVE FOOD: APPLICANTS MUST OBTAIN ALL NECESSARY APPROVALS FROM THE HEALTH DEPARTMENT. SEPARATE PLAN REVIEWS AND FEES MAY BE REQUIRED. CONTACT THE PHILADELPHIA DEPARTMENT OF PUBLIC HEALTH - ENVIRONMENTAL HEALTH SERVICES / OFFICE OF FOOD PROTECTION: 321 UNIVERSITY AVE. - 2ND Floor, PHILADELPHIA, PA 19104 TELEPHONE NUMBER: (215) 686-7495					
<b>LIMITATIONS:</b> IN CASES WHERE CONSTRUCTION OR INTERIOR ALTERATIONS ARE INVOLVED, A BUILDING PERMIT MUST BE OBTAINED WITHIN THREE (3) YEARS FROM THE DATE OF ISSUANCE OF THIS ZONING PERMIT.  IN CASES WHERE NO CONSTRUCTION OR INTERIOR ALTERATIONS ARE INVOLVED, THIS PERMIT BECOMES INVALID AFTER SIX (6) MONTHS UNLESS AN APPLICATION FOR A CERTIFICATE OF OCCUPANCY IS SUBMITTED AND SUBSEQUENTLY APPROVED.					
<b>THIS PERMIT IS NOT A CERTIFICATE OF OCCUPANCY OR A LICENSE.</b>					
ALL PROVISIONS OF THE CODE AND OTHER CITY ORDINANCES MUST BE COMPLIED WITH, WHETHER SPECIFIED HEREIN OR NOT. THIS PERMIT CONSTITUTE APPROVAL FROM ANY STATE OR FEDERAL AGENCY, IF REQUIRED.					
<b><u>WITHIN 5 DAYS OF RECEIPT OF THIS PERMIT A TRUE COPY OF THIS PERMIT MUST BE POSTED IN A CONSPICUOUS LOCATION ON THE PREMISES FOR 30 DAYS</u></b>					



## City of Philadelphia



(Bill No. 130695)

### AN ORDINANCE

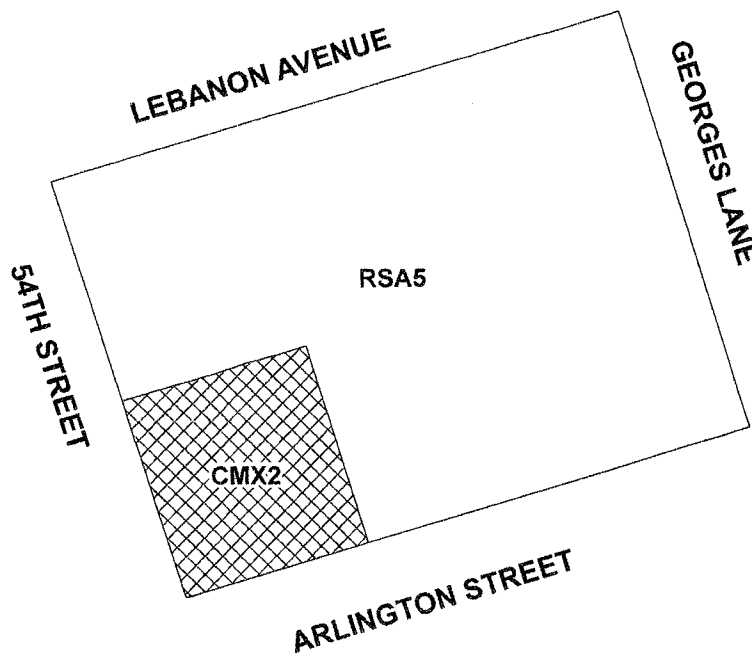
To amend the Philadelphia Zoning Maps by changing the zoning designations of certain areas of land located within an area bounded by 54th Street, Lebanon Avenue, Georges Lane, and Arlington Street.

#### *THE COUNCIL OF THE CITY OF PHILADELPHIA HEREBY ORDAINS:*



SECTION 1. Pursuant to Section 14-106 of The Philadelphia Code, the Philadelphia Zoning Maps are hereby amended by changing the zoning designations of certain areas of land within an area bounded by 54th Street, Lebanon Avenue, Georges Lane, and Arlington Street, from the existing zoning designations indicated on Map "A" set forth below to the zoning designations indicated on Map "B" set forth below.

SECTION 2. This Ordinance shall become effective immediately.

# MAP A - EXISTING ZONING

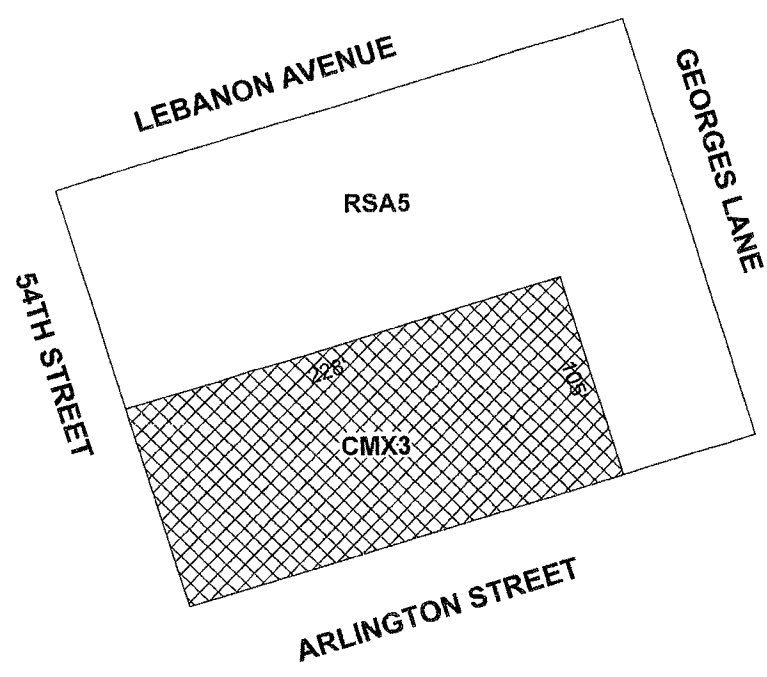


## Legend

-  CMX2 Commercial Mixed-Use
-  RSA5 Residential Single Attached



# MAP B - PROPOSED ZONING



### Legend



-  CMX3 Commercial Mixed Use
-  RSA5 Residential Single Attached



Exhibit C

**City of Philadelphia**  
**Wynne Theatre Senior Residences**  
**Economic Opportunity Plan**

**I. PROJECT AND PLAN INTRODUCTION**

The project consists of **Wynne Theatre Senior Residences** (referred to hereafter as the "Project") for **Wynne Theatre Associates, LLC** (referred to hereafter as the "Owner") to Provide the new Construction of 54 affordable senior rental units, (provide location) 2001-11 64<sup>th</sup> St. Philadelphia, Pa 19131, within the city of Philadelphia, Pennsylvania. The purpose, standards and procedures of this Economic Opportunity Plan (referred to hereafter as the "Plan") are the expressed wishes of the Owner as set forth herein. Participants shall include consultants, management, prime contractors, sub-contractors and vendors of supplies, equipment and materials. All participants will be obligated to fully comply with the requirements of the Plan.

The Owner is committed to provide meaningful and representative opportunities for minority-owned, women-owned and disabled-owned business enterprises, and economically disadvantaged-owned business enterprises (collectively referred to hereafter as "M/W/DS-BEs" and "DBEs"), and individuals that are locally based in all phases of the Project. It is expected all Participants make the same commitment. Each Participant shall not, and furthermore, shall ensure that their associates, partners or representatives shall not, discriminate on the basis of race, color, religion, sex or natural origin in the award and performance of contracts pertaining to the Project or with respect to any and all related employment practices.

For all contracting efforts, each prime consultant and contractor shall use its good faith and nondiscriminatory efforts to provide joint venture partnerships, sub-consulting and subcontracting opportunities for minority, women, disabled, and/or disadvantaged business enterprises (collectively, M/W/DS-BE and/or DBE) registered in the City of Philadelphia's Office of Economic Opportunity ("OEO") and/or any agency that the City of Philadelphia recognizes as having *bona fide* certifying program. All participants in the Project shall observe and be subject to the enforcement of all relevant City of Philadelphia, Commonwealth of Pennsylvania and federal laws, ordinances, orders, rules and/or regulations regarding M/W/DS-BE and/or DBE firms and locally-based business enterprises. Furthermore, affirmative action will be taken, consistent with sound procurement policies and applicable laws to ensure that M/W/DS-BE and/or DBE firms are afforded a meaningful and representative opportunity to participate in contracts relating to the Project.

For the purposes of this Plan, the term "minority" shall refer to the following: black (all persons having origins in any of the Black African racial groups); Hispanic/Latino (all persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin); Asian and Pacific Islander (all persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent or the Pacific Islands); and American Indians (all persons having origins in any of the original peoples of North America and maintaining identifiable tribal affiliations through membership and participation or community identification).

Agencies and representatives of the City of Philadelphia and/or Commonwealth of Pennsylvania may be consulted regarding the appropriate inclusion of M/W/DS-BE and/or DBE firms and socially/economically disadvantaged professionals in this Project as outlined in this Plan and with regard to its implementation.

EOP - Affordable Rental Housing

1

Exhibit C

**II. PROCEDURES FOR DETERMINATION**

**A. Project Scope.**

**B. Duration.** This Plan shall apply to contracts awarded and procurements by the Owner and all Participants throughout the entire length of the Project.

**C. Statement of Objectives.** The Objectives set forth in the Plan shall be incorporated in all requests for proposals, bid packages and solicitations for the Projects and communicated to all Participant levels.

**D. Goals**

**1. MW/DBE Participation Ranges**

As a benchmark for the Bidder's/Respondent's expression of its Best and Good Faith Efforts to provide meaningful and representative opportunities for MW/DBEs in the contract, the following participation ranges have been developed. These participation ranges represent, in the absence of discrimination in the solicitation and selection of MW/DBEs, the percentage of MBE, WBE and DBE participation that is reasonably attainable on this contract through the exercise of Bidder's/Respondent's Best and Good Faith Efforts. In order to maximize opportunities for as many businesses as possible, a firm that is certified in two or more categories (e.g. MBE and WBE and DBE or WBE and DBE) will only be credited toward one participation range as either an MBE or WBE or DBE. The firm will not be credited toward more than one category. These ranges are based upon an analysis of factors such as the size and scope of the contract and the availability of MBEs, WBEs and DBEs to perform various elements of the contract.

Contract	MBE	WBE	DBE
Professional Services	3-5%	3-5%	2%
Construction Contracts	15-20%	10-15%	
Services			
Supplies And Equipment	2%	1%	

**2. Employment Goals**

The Bidder's/Respondent's agree to exhaust Best and Good Faith Efforts to employ minority persons and females in its workforce of apprentices and journeymen at the following levels:

- Minority Apprentices - 50% of all hours worked by all apprentices
- Minority Journeymen - 32% of all journey hours worked across all trades
- Female Apprentices - 7% of all hours worked by all apprentices
- Female Journeypersons - 7% of all hours worked across all trades

**III. BIDDER/RESPONDENT RESPONSIVENESS AND RESPONSIBILITY**

**A.** Bidder/Respondent shall identify all its MW/DBE commitments and evidence its agreement to employ minority persons and females at the levels stated herein on the

<sup>1</sup> These goals, which have been adopted by the Economic Opportunity Cabinet, are the recommendations of the Mayor's Commission on Construction Industry Diversity.

## Exhibit C

form entitled, "M/W/DSBE Participation and Workforce Commitments." The Bidder's/Respondent identified commitment to use an M/W/DSBE on this form constitutes a representation by Bidder/Respondent, that the M/W/DSBE is capable of completing the subcontract with its own workforce, and that the Bidder/Respondent has made a legally binding commitment with the firm. The listing of the M/W/DSBE firm by Bidder/Respondent further represents that if Bidder/Respondent is awarded the contract, Bidder/Respondent will subcontract with the listed firm(s) for the work or supply effort described and the dollar/percentage amount(s) set forth on the form. In calculating the percentage of M/W/DSBE participation, Bidder/Respondent shall apply the standard mathematical rules in rounding off numbers. In the event of inconsistency between the dollar and percentage amounts listed on the form, the percentage will govern. Bidder/Respondent is to maintain the M/W/DSBE percentage commitments throughout the term of the contract which shall apply to the total amount of the contract and any additional increases. In the event the Successful Bidder's/Respondent's contract is increased by change order and/or modification, or amendment, it shall be the responsibility of the Successful Bidder/Respondent to apply its Best and Good Faith Efforts to the amended amount in order to maintain any participation ranges committed to on the total dollar amount of the contract at the time of contract completion.

**1. Commercially Acceptable Function**

A Bidder/Respondent that enters into a subcontract with an M/W/DSBE shall be considered to have made a Best and Good Faith Effort in that regard only if its M/W/DSBE subcontractor performs a commercially acceptable function ("CAF"). An M/W/DSBE is considered to perform a CAF when it engages in meaningful work or supply effort that provides for a distinct element of the subcontract (as required by the work to be performed in accordance with Bid specifications), where the distinct element is worthy of the dollar amount of the subcontract and where the M/W/DSBE carries out its responsibilities by actually performing, managing and supervising the work involved; M/W/DSBE subcontractors must perform at least twenty percent (20%) of the cost of the subcontract (not including the cost of materials, equipment or supplies incident to the performance of the subcontract) with their own employees.

For example, a Bidder/Respondent using an M/W/DSBE non-stocking supplier (i.e., a firm that does not manufacture or warehouse the materials or equipment of the general character described by the Bid/RFP specifications and required under the contract) to furnish equipment or materials will only receive credit towards the participation ranges for the fees or commissions charged, not the entire value of the equipment or materials furnished.

B. Upon award, letters of intent, quotations, and any other accompanying documents regarding commitments with M/W/DSBEs, including the M/W/DSBE Participation and Workforce Commitments Form, become part of the contract. M/W/DSBE commitments are to be memorialized in a written subcontract agreement and are to be maintained throughout the term of the contract and shall apply to the total contract value (including approved change orders and amendments). Throughout the term of the contract, Bidder/Respondent is required to continue its Best and Good Faith Efforts.

C. In the event Bidder/Respondent does not identify on the M/W/DSBE Participation and Workforce Commitments Form that it has made M/W/DSBE commitments within the participation ranges established for this Bid and/or does not agree to the employment goals described herein, Bidder/Respondent must complete and submit a *Documentation of Best and Good Faith Efforts Form* ("BGFE Form"), documenting its solicitations and any commitments with M/W/DSBEs, and detailing any efforts made to include M/W/DSBEs in the contract and to employ a diverse workforce. The submission of the

## Exhibit C

BGFE Form is an element of bid/RFP responsiveness. The BGFE Form must include at a minimum, certification and documentary evidence that the following actions were taken:

1. Solicitation directed to both qualified M/W/DBEs registered with OEO and qualified M/W/DBEs certified by agencies approved by OEO. Bidder/Respondent must provide a list of all certification directories used for soliciting participation for this Bid/RFP. Bidder/Respondent must determine with reasonable certainty if the M/W/DBEs are interested by taking appropriate steps to follow up on initial solicitations; one time contact, without follow up, is not acceptable; and
2. Bidder/Respondent provided interested M/W/DBEs with adequate information about the plans, specifications, and requirements of the contract in a timely manner to assist them in responding to a solicitation; and
3. Bidder/Respondent negotiated in good faith with interested M/W/DBEs. A Bidder/Respondent using good business judgment would consider a number of factors in negotiating with subcontractors, including M/W/DBE subcontractors, and would take a firm's price and capabilities as well as the objectives of the Plan into consideration; and
4. Documentation of the following:
  - i. Any commitments to use M/W/DBEs in its Bid/RFP for subcontracted services and materials supply even when Bidder/Respondent would otherwise prefer to self-perform/supply these items; and
  - ii. Correspondence between the Bidder/Respondent and any M/W/DBE(s) related to this Bid/RFP; and
  - iii. Attendance logs and/or records of any scheduled pre-bid/pre-proposal meeting; and
5. Certification and evidence that the following actions were taken or documentation of the following, or an explanation why these actions were not taken or why documentation does not exist:
  - i. Any arms length business assistance provided to interested M/W/DBEs which may include access/introduction to major manufacturer/suppliers, lines of credit and union halls; and
  - ii. Solicitation through job fairs, newspapers, periodicals, advertisements and other organizations or media that are owned by M/W/DBEs and/or focus on M/W/DBEs; and
  - iii. Telephone logs of communications related to this Bid/RFP; and
  - iv. Notification of and access to Bid/RFP documents at the Bidder/Respondent's office or other office locations for open and timely review; and
  - v. Bidder/Respondent sought assistance from the Urban Affairs Coalition, Careerslink Philadelphia, Opportunity Industrial Center and the Philadelphia Workforce Development Corporation to perform employment outreach; and

Exhibit C

- vi. Bidder/Respondent published its policy of nondiscrimination in the hiring, retention and promotion of employees; and
- vii. Any agreement with an apprenticeship or training program that targets the employment of minority persons, disabled persons and women.

**D. Good Faith Efforts.**

Participants shall reasonably exhaust the use of best and good faith efforts as defined hereunder to provide appropriate participation and utilization opportunities for M/W/DS-BE and/or DBE firms. All Project contractors and vendors will be required to do likewise, consistent with best and sound procurement practices, and with applicable law. *Best and good faith efforts* will be deemed adhering to when a Participant meets the criteria set forth in this section and demonstrates and documents its efforts throughout the length of the Project. If the established ranges for inclusion of M/W/DS-BE and/or DBE firms are not met, a Participant must submit a Subcontracting/Vendor Plan showing how *best and good faith efforts* were made to achieve said ranges. This plan must include, but not be limited to, the following:

- Written request for assistance to the Owner three (3) business days prior to the Bid/RFP due date.
- Solicitation through newspapers, periodicals advertisements, and job fairs, etc.
- Telephone logs.
- Evidence of solicitation to qualified OEO and/or PAUCP registered/certified M/W/DS-BE and/or DBE firms.
- Bid/RFP results and reasons as to why no awards were made to M/W/DS-BE and/or DBE firms.
- Use of City/OEO-registered business firms via their directory at <http://oao.phila.gov/directory.asp>
- Use of PAUCP certified business firms via their directory at [www.paucp.com](http://www.paucp.com)
- Correspondence between contracting firm and any M/W/DS-BE and/or DBE firms.
- Attendance logs and/or records of any scheduled pre-bid or pre-proposal meeting
- Specific, general and technical assistance offered and provided to M/W/DS-BE and/or DBE firms related to their portion of the project.
- Proof there was notification of and access to Bid/RFP documents at company or other office locations for open and timely review.

E. Owner requirements relative to monitoring of *best and good faith efforts* of Participants engaged in the Project shall be established by the Owner in consultation with appropriate city, state and federal agencies and/or private professional entities to include (in addition to further measures as may be required) the following:

- 1) Participants shall submit copies of signed contracts and purchase orders with M/W/DS-BE and/or DBE subcontractors.
- 2) Participants shall be ready to provide evidence of payments to their subcontractors, sub-consultants and supply vendors for participation verification. This documentation should be provided monthly or included with every request for payment to Contractors.
- 3) At the conclusion of work, the Subcontractor shall provide a statement or other evidence of the actual dollar amounts paid to M/W/DS-BE and/or DBE subcontractors.



Exhibit C

4) All On-site Contractors shall be prepared to submit "certified" payrolls listing the following items for all on-site employees:

1. Full name
2. Social Security number
3. Full address
4. Trade classification (e.g., laborer, carpenter, apprentice, electrician, plumber, and foreman)
5. Gender
6. Race
7. Hours worked
8. All withholding (e.g., laborer, local, state, FICA, etc.)
9. Name of Contractor and Indication of Prime for Subcontractors
10. Name of Project

5) Certified payroll reports shall be signed by an authorized company officer.

6) The Participant shall comply with all applicable requirements of any federal, state or local law ordinance or regulation relating to contract and payroll compliance.

**F. Documentation of Best and Good Faith Efforts and Compliance.**

Two components have been established to facilitate the inclusion of M/W/D/S-BE and/or DBE firms as contractors and vendors, and minority /female/local residents as Project site workforce participants:

1) M/W/D/S-BE and/or DBE contracting and vending participation levels: the basis for each determination will be the total dollar amount of the bid/contract OR the total dollar amount of the bid/contract for the Identified Project task.

2) Minority/Female/Local Resident Employment Participation Levels: the basis for each determination will be the projected total on-site field employee hours divided by the number of minority, female and local residents' employee hours anticipated to be performed on the Contractor's payroll, and each of the Contractor's on-site subcontractors payrolls.

**G. Oversight Committee**

The Owner and/or at the discretion of the City of Philadelphia, in consultation with the appropriate agencies and entities, will establish and identify the members of a Project Oversight Committee, including representatives from the Owner, the Developer and/or the General Contractor, The Office of Economic Opportunity, City Council, and community organizations. Participants will engage in monitoring, reporting and problem solving activities which are to include regular meetings to address all matters relevant to further development of the Plan, carrying out its implementation and the successful completion of the Project.

A meeting of the Oversight Committee shall be called by the Owner or the City of Philadelphia within one (1) month of the initiation of this Project and shall meet on a regular basis during all phases of the Project. Participants will engage in monitoring, reporting and problem solving activities which are to include regular meetings to address all matters relevant to further development of the Plan, carrying out its implementation and the successful completion of the Project.

**H. Reporting**

The Owner, will agree to file an annual report with the City of Philadelphia and City Council concerning the performance of the Economic Opportunity Plan within the Project. Snapshot reporting will include: (i) utilization of M/W/D/SBEs and/or DBEs; (ii) the hiring and employment of minorities and females; (iii) the hiring and employment of Philadelphia residents and; (iv) training programs utilized and the placement rates.

Exhibit C

All reports (quarterly & annually) to the City under this section will be provided to the Office of Economic Opportunity and to the members of the Oversight Committee.

#### IV. CERTIFIED M/W/DS-BE AND/OR DBE FIRMS

- A. Only businesses that are owned, managed and controlled, in both form and substance, as M/W/DS-BE and/or DBE firms shall participate in this Project's Economic Opportunity Plan. To ensure this standard, all businesses, including joint ventures, must be registered with the City of Philadelphia's Office of Economic Opportunity (OEO) or members of the Pennsylvania Unified Certification Program (PAUCP).
- B. M/W/DS-BE and/or DBE certification should not be the sole determination of a Bidder/Respondent's or Contractor's financial or technical ability to perform specified work. The Owner reserves the right to evaluate the Contractor's or Subcontractor's ability to satisfy financial, technical, or other criteria separate and apart from said certifications before bid opening. Pre-qualification conditions and requirements shall be conveyed in a fair, open and non-discriminatory manner to all.
- C. The Owner recognizes that M/W/DS-BE and/or DBE certifications may expire or the firm may experience de-certification by an authorized governmental entity. Certifications that expire during a firm's participation on a particular phase of the Project may be counted toward overall goals for participation ranges. However, said firm MUST become re-certified prior to consideration for future goal credit in the Project's Plan. If a firm has been de-certified, said firm would not be eligible to participate.

#### V. NON-COMPLIANCE

- A. In cases where the Owner has cause to believe that a Participant, acting in good faith, has failed to comply with the provisions of the Plan, the Owner and/or the Oversight Committee, with the assistance and consultation of the appropriate agencies and professional entities, shall attempt to resolve the noncompliance through conciliation and persuasion.
- B. In conciliation, the Participant must satisfy the Owner and the Oversight Committee that they have made their *best and good faith efforts* to achieve the agreed upon participation goals by certified M/W/DS-BE and/or DBE firms. *Best and good faith efforts* on the part of the Participant/Contractor include:
- 1) Entering into a contractual relationship with the designated M/W/DS-BE and/or DBE firm in a timely, responsive and responsible manner, and fulfilling all contractual requirements, including payments, in said manner.
  - 2) Notifying all parties, including the Owner, the M/W/DS-BE and/or DBE firm, the Oversight Committee and all relevant Participants, of any problems in a timely manner.
  - 3) Requesting assistance from the Owner and/or the Oversight Committee in resolving any problems with any M/W/DS-BE and/or DBE firm.
  - 4) Making every reasonable effort to appropriately facilitate successful performance of contractual duties by an M/W/DS-BE and/or DBE firm through timely, clear and direct communications.

EOP - Affordable Rental Housing

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Exhibit C

C. In cases where the Owner and/or the Oversight Committee have cause to believe that any Participant has failed to comply with the provisions of the Plan, they shall conduct an investigation.

D. After affording the Participant notice and an opportunity to be heard, the Owner and/or the Oversight Committee are authorized to take corrective, remedial and/or punitive action. Such actions may include, but are not limited to:

- 1) Declaring the Participant as non-responsible and/or non-responsive, with a determination as ineligible to receive the award of a contract, continue a contract and/or ineligible for any other future contracts affiliated with this Plan;
- 2) Suspending the violating Participant from doing business with the Owner;
- 3) Withholding payments to the violating Participant; and/or
- 4) Pursuing and securing any relief which the Owner and/or the Oversight Committee may deem to be necessary, proper, and in the best interest of the Owner and the Project, consistent with applicable policy and law.

E. A Participant may appeal a determination of non-compliance with this Plan by filing a written grievance with the Owner and/or its Oversight Committee.

F. Within five (5) working days the Owner and/or the Oversight Committee shall issue and serve a written notice/determination, together with a copy of the grievance as filed, to all persons named in the grievance.

VI. GUIDELINES FOR JOINT VENTURING

Joint Venture relationships with certified MW/DS-BE and/or DBE firms must meet the following criteria in order to receive credit towards participation goals:

- 1) The MW/DS-BE and/or DBE partner(s) must be certified by OEO, PAUCP or a qualified governmental agency authorized by law to certify such enterprises prior to proposal/bid submission.
- 2) The MW/DS-BE and/or DBE partner(s) must be substantially involved in significant phases of the contract including, but not limited to, the performance (with its own work force) of a portion of the on-site work, and of administrative responsibilities, such as bidding, planning, staffing and daily management.
- 3) The business arrangements must be customary (i.e., each partner shares in the risk and profits of the joint venture commensurate with their respective ownership interests).
- 4) If a certified partner is a MBE, WBE, DSBE, and/or DBE the participation will be credited only to the extent of the partner's ownership interest in the joint venture; there will remain a requirement to meet MW/DS-BE and/or DBE goals.

[Signature]  
Owner Representative

9/16/13  
Date

Angela Ford-Burton  
Office of Economic Opportunity

10/28/2013  
Date

## City of Philadelphia

BILL NO. 130695 continued

Certified Copy

CERTIFICATION: This is a true and correct copy of the original Bill, Passed by the City Council on November 14, 2013. The Bill was Signed by the Mayor on December 4, 2013.



Michael A. Decker  
Chief Clerk of the City Council



CITY OF PHILADELPHIA

Philadelphia City Planning Commission  
1515 Arch Street, 13th Floor  
Philadelphia, PA 19102  
(215) 683-4602  
FAX (215) 683-4675

GARY J. JASTRZAB  
Executive Director

EVA GLADSTEIN  
Deputy Executive Director

October 16, 2013

The Honorable Michael A. Nutter  
Mayor, City of Philadelphia  
City Hall, Room 215  
Philadelphia, PA 19107

RE: Bill No. 130695 - An Ordinance to amend the Philadelphia Zoning Maps by changing the zoning designations of certain areas of land located within an area bounded by 54th Street, Lebanon Avenue, Georges Lane, and Arlington Street.

Dear Mayor Nutter:

Pursuant to Section 4-604 of the Philadelphia Home Rule Charter, the City Planning Commission has reviewed Bill No. 130695 introduced by Councilmember Jones on October 3, 2013.

Bill No. 130695 proposes to rezone the former Wynne Theater property from a "split zoning" designation of "CMX-2" Commercial Mixed-Use and "RSA-5" Residential Single-Family Attached to "CMX-3" Commercial Mixed-Use. This new designation will permit Penrose Properties to demolish the existing structure and construct a new 60,000 square foot building containing 54 senior apartments, 1,200 square feet of ground floor commercial space, and 11 accessory parking spaces.

At its meeting of October 15, 2013, the City Planning Commission recommended that Bill No. 130695 be approved.

Sincerely,

Gary J. Jastrzab  
Executive Director

## **Inventory Request Form & Response**

## PHFA HOUSING INVENTORY REQUEST FORM

Date: 11/11/2014

**Person Requesting Information**

Kevin McConnell

Company Name J. McHale & Associates

Address 693 Main Street Building C; 2<sup>nd</sup> Floor

City Lumberton

State NJ Zip Code 08048

Telephone 609-914-4679 FAX 609-914-0079

E-mail Address kmccconnell@jmchaleassoc.com

How would you like your request returned? FAX  E-MAIL

**Development Name (if known)** Wynne Theater Senior Project

*Exact Site Location/Address* 54<sup>th</sup> & Arlington Streets Philadelphia Pennsylvania

**Requesting Information For**

Exact Site Municipality City of Philadelphia

County Philadelphia County, PA

Zip Code(s)

19104

19131

19139

19151

Census Tract(s)

\* See attached sheet.

Additional Information and/or Comments

Proposed 50-unit, senior project consisting of one & two bedroom units.

Submit your request by fax 717-780-1811 or by e-mail [llutz@phfa.org](mailto:llutz@phfa.org).

The above information describes the location of the proposed site and additional details to be utilized by the Agency in response to the PHFA Housing Inventory request. The inventory is for information purposes only.

## **Housing Providers Needs Assessment**



# **PENROSE**

We Bring It All Together

October 8, 2013

Mr. Kelvin A. Jeremiah  
President and CEO  
Philadelphia Housing Authority  
12 South 23rd Street  
Philadelphia, PA 19103

Re: **Wynne Senior Residences**

Dear Mr. Jeremiah:

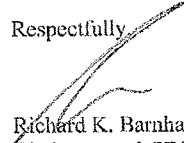
Pennrose Properties in partnership with Wynnefiled-Overbrook Revitalization Corporation is submitting an application to PHFA for Tax Credits for the Wynne Senior Residences Project (WSR). The WSR will be a newly constructed, 54 unit senior residence located in the Wynnefield section of Philadelphia. It will be affordable to applicants up to 60% of area median income and restricted to those seniors that are at least 62 years of age. There will be 47 one bedroom units and 7 two bedroom units with a host of amenities including on-site management and maintenance, laundry facilities, lounges and a community room to mention a few.

I am writing to notify PHA of this impending development and to indicate that we would like to cooperate with the PHA with regards to the assisting in providing quality affordable housing to qualified residents on your public housing waiting list.

All of our units will be open to the public upon commencement of leasing activities and we are sure that many of the applicants on your public housing waiting list, many who have probably been waiting for some time to obtain housing, will certainly qualify for housing at Wynne Senior Residences.

We look forward to working with your management staff in providing this housing opportunity upon completion of our facility. If you have any questions, please contact our Developer for this project, Harry D. Moody at 267-386-8664 or [hmoody@penrose.com](mailto:hmoody@penrose.com).

Respectfully,

  
Richard K. Barnhart  
Chairman and CEO

One Brewery Park | 1301 North 23rd Street | Philadelphia, PA 19121-4493 | P: 267.386.8800 | E: 267.386.8850

Pennrose.com



## **HISTA Report (Ribbon Demographics)**

Renter Households						
Age 15 to 54 Years						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	3,586	1,340	1,105	609	701	7,341
\$10,000-20,000	1,587	1,704	686	437	407	4,321
\$20,000-30,000	1,086	958	485	391	510	3,430
\$30,000-40,000	1,385	822	367	408	239	3,221
\$40,000-50,000	945	517	372	96	93	2,023
\$50,000-60,000	518	349	300	261	106	1,534
\$60,000-75,000	307	507	279	127	239	1,459
\$75,000-100,000	320	654	193	124	102	1,393
\$100,000-125,000	93	251	229	37	68	678
\$125,000-150,000	34	31	60	55	16	196
\$150,000-200,000	105	52	62	26	37	282
\$200,000+	28	22	22	7	12	201
<b>Total</b>	<b>10,044</b>	<b>6,762</b>	<b>4,160</b>	<b>2,578</b>	<b>2,535</b>	<b>26,079</b>

Renter Households						
Aged 55+ Years						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	2,250	332	100	42	48	2,772
\$10,000-20,000	1,636	480	136	82	60	2,394
\$20,000-30,000	621	277	135	35	39	1,107
\$30,000-40,000	508	204	52	55	61	880
\$40,000-50,000	302	158	38	39	35	572
\$50,000-60,000	202	115	31	33	17	398
\$60,000-75,000	239	72	26	29	22	368
\$75,000-100,000	163	99	39	25	23	349
\$100,000-125,000	156	128	32	18	18	352
\$125,000-150,000	77	34	10	16	6	143
\$150,000-200,000	79	45	16	7	19	166
\$200,000+	54	43	10	7	11	125
<b>Total</b>	<b>6,287</b>	<b>1,987</b>	<b>625</b>	<b>388</b>	<b>359</b>	<b>9,646</b>

Renter Households						
Aged 62+ Years						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,411	212	67	33	37	1,760
\$10,000-20,000	1,384	316	78	38	52	1,868
\$20,000-30,000	393	156	78	32	26	685
\$30,000-40,000	333	141	37	24	26	561
\$40,000-50,000	167	52	35	20	18	292
\$50,000-60,000	116	59	23	26	11	235
\$60,000-75,000	125	51	20	13	12	221
\$75,000-100,000	84	43	30	21	15	193
\$100,000-125,000	104	71	24	14	15	228
\$125,000-150,000	43	20	5	9	3	80
\$150,000-200,000	48	16	13	5	10	92
\$200,000+	38	22	7	7	6	87
<b>Total</b>	<b>4,246</b>	<b>1,166</b>	<b>417</b>	<b>242</b>	<b>231</b>	<b>6,302</b>

Renter Households						
All Age Groups						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	5,836	1,672	1,205	651	749	10,113
\$10,000-20,000	3,223	1,684	822	519	467	6,715
\$20,000-30,000	1,707	1,235	620	426	549	4,537
\$30,000-40,000	1,893	1,026	419	463	300	4,101
\$40,000-50,000	1,247	675	410	135	128	2,595
\$50,000-60,000	720	464	331	294	123	1,932
\$60,000-75,000	546	579	305	156	261	1,847
\$75,000-100,000	483	753	232	149	125	1,742
\$100,000-125,000	249	379	261	55	86	1,030
\$125,000-150,000	111	65	70	71	22	339
\$150,000-200,000	184	97	78	33	56	448
\$200,000+	132	120	32	14	28	326
<b>Total</b>	<b>16,331</b>	<b>8,749</b>	<b>4,785</b>	<b>2,966</b>	<b>2,894</b>	<b>35,725</b>

**Percent Renter Households**  
Age 15 to 54 Years  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	13.8%	5.1%	4.2%	2.3%	2.7%	28.1%
\$10,000-20,000	6.1%	4.6%	2.6%	1.7%	1.6%	16.6%
\$20,000-30,000	4.2%	3.7%	1.9%	1.5%	2.0%	13.2%
\$30,000-40,000	5.3%	3.2%	1.4%	1.6%	0.9%	12.4%
\$40,000-50,000	3.6%	2.0%	1.4%	0.4%	0.4%	7.8%
\$50,000-60,000	2.0%	1.3%	1.2%	1.0%	0.4%	5.9%
\$60,000-75,000	1.2%	1.0%	1.1%	0.5%	0.5%	5.6%
\$75,000-100,000	1.2%	2.5%	0.7%	0.3%	0.4%	5.3%
\$100,000-125,000	0.4%	1.0%	0.9%	0.1%	0.3%	2.6%
\$125,000-150,000	0.1%	0.1%	0.2%	0.2%	0.1%	0.8%
\$150,000-200,000	0.4%	0.2%	0.2%	0.1%	0.1%	1.1%
\$200,000+	0.3%	0.3%	0.1%	0.6%	0.1%	0.9%
<b>Total</b>	<b>38.5%</b>	<b>25.9%</b>	<b>16.0%</b>	<b>9.9%</b>	<b>9.7%</b>	<b>100.0%</b>

**Percent Renter Households**  
Aged 55+ Years  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	23.3%	3.4%	1.0%	0.4%	0.5%	28.7%
\$10,000-20,000	17.0%	5.0%	1.4%	0.9%	0.6%	24.8%
\$20,000-30,000	6.4%	2.9%	1.4%	0.4%	0.4%	11.5%
\$30,000-40,000	3.3%	2.1%	0.5%	0.6%	0.6%	9.1%
\$40,000-50,000	1.1%	1.6%	0.4%	0.4%	0.4%	5.9%
\$50,000-60,000	2.1%	1.2%	0.3%	0.3%	0.2%	4.1%
\$60,000-75,000	2.5%	0.7%	0.3%	0.3%	0.2%	4.0%
\$75,000-100,000	1.7%	1.0%	0.4%	0.3%	0.2%	3.6%
\$100,000-125,000	1.6%	1.3%	0.3%	0.2%	0.2%	3.6%
\$125,000-150,000	0.8%	0.4%	0.1%	0.2%	0.1%	1.5%
\$150,000-200,000	0.8%	0.5%	0.2%	0.1%	0.2%	1.7%
\$200,000+	0.6%	0.4%	0.1%	0.1%	0.1%	1.3%
<b>Total</b>	<b>65.2%</b>	<b>20.6%</b>	<b>6.5%</b>	<b>4.0%</b>	<b>3.7%</b>	<b>100.0%</b>

**Percent Renter Households**  
Aged 62+ Years  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	22.4%	3.4%	1.1%	0.5%	0.6%	27.9%
\$10,000-20,000	22.0%	5.0%	1.2%	0.6%	0.8%	29.6%
\$20,000-30,000	6.2%	2.5%	1.2%	0.5%	0.4%	10.9%
\$30,000-40,000	5.3%	2.2%	0.6%	0.4%	0.4%	8.9%
\$40,000-50,000	2.6%	0.8%	0.6%	0.3%	0.3%	4.6%
\$50,000-60,000	1.8%	0.9%	0.4%	0.4%	0.2%	3.7%
\$60,000-75,000	2.0%	0.8%	0.3%	0.2%	0.2%	3.5%
\$75,000-100,000	1.3%	0.7%	0.5%	0.3%	0.2%	3.1%
\$100,000-125,000	1.7%	1.1%	0.4%	0.2%	0.2%	3.6%
\$125,000-150,000	0.7%	0.3%	0.1%	0.1%	0.0%	1.3%
\$150,000-200,000	0.8%	0.3%	0.2%	0.1%	0.2%	1.5%
\$200,000+	0.6%	0.3%	0.1%	0.1%	0.1%	1.4%
<b>Total</b>	<b>67.4%</b>	<b>18.5%</b>	<b>6.6%</b>	<b>3.8%</b>	<b>3.7%</b>	<b>100.0%</b>

**Percent Renter Households**  
All Age Groups  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	16.3%	4.7%	3.4%	1.8%	2.1%	28.3%
\$10,000-20,000	9.0%	4.7%	2.3%	1.5%	1.3%	18.8%
\$20,000-30,000	4.8%	3.5%	1.7%	1.2%	1.5%	12.7%
\$30,000-40,000	5.3%	2.9%	1.2%	1.3%	0.8%	11.5%
\$40,000-50,000	3.5%	1.9%	1.1%	0.4%	0.4%	7.3%
\$50,000-60,000	2.0%	1.3%	0.9%	0.8%	0.3%	5.4%
\$60,000-75,000	1.5%	1.6%	0.9%	0.4%	0.3%	4.9%
\$75,000-100,000	1.4%	2.1%	0.6%	0.4%	0.3%	2.9%
\$100,000-125,000	0.7%	1.1%	0.7%	0.2%	0.3%	0.9%
\$125,000-150,000	0.3%	0.2%	0.2%	0.2%	0.1%	0.9%
\$150,000-200,000	0.5%	0.3%	0.2%	0.1%	0.2%	1.3%
\$200,000+	0.4%	0.3%	0.1%	0.0%	0.1%	0.9%
<b>Total</b>	<b>45.7%</b>	<b>24.5%</b>	<b>13.1%</b>	<b>8.3%</b>	<b>8.1%</b>	<b>100.0%</b>

Owner Households						
Age 15 to 54 Years						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	442	241	434	138	85	1,340
\$10,000-20,000	327	287	458	100	113	985
\$20,000-30,000	265	293	208	343	220	1,329
\$30,000-40,000	468	357	421	110	245	1,601
\$40,000-50,000	269	463	202	224	287	1,445
\$50,000-60,000	306	396	361	117	127	1,307
\$60,000-75,000	285	500	480	229	289	1,783
\$75,000-100,000	197	355	256	350	456	1,614
\$100,000-125,000	12	202	216	238	160	828
\$125,000-150,000	21	62	141	157	45	426
\$150,000-200,000	13	164	95	51	76	399
\$200,000+	32	44	45	82	52	255
<b>Total</b>	<b>2,637</b>	<b>3,364</b>	<b>3,017</b>	<b>2,139</b>	<b>2,155</b>	<b>13,312</b>

Owner Households						
Aged 55+ Years						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,496	361	114	54	108	2,133
\$10,000-20,000	1,814	730	290	115	61	3,010
\$20,000-30,000	756	713	144	104	90	1,807
\$30,000-40,000	573	477	244	149	120	1,563
\$40,000-50,000	434	568	162	106	46	1,316
\$50,000-60,000	347	461	173	81	100	1,162
\$60,000-75,000	320	361	223	107	59	1,070
\$75,000-100,000	215	483	185	82	87	1,052
\$100,000-125,000	144	232	131	57	31	595
\$125,000-150,000	40	59	34	29	55	217
\$150,000-200,000	48	114	72	32	32	298
\$200,000+	69	88	32	15	12	222
<b>Total</b>	<b>6,256</b>	<b>4,647</b>	<b>1,811</b>	<b>931</b>	<b>801</b>	<b>14,446</b>

Owner Households						
Aged 62+ Years						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,165	278	95	36	65	1,639
\$10,000-20,000	1,574	598	171	77	45	2,465
\$20,000-30,000	567	568	128	81	83	1,427
\$30,000-40,000	419	378	139	110	103	1,149
\$40,000-50,000	211	404	116	77	32	840
\$50,000-60,000	174	361	94	65	83	777
\$60,000-75,000	164	195	118	78	42	597
\$75,000-100,000	127	252	99	47	64	589
\$100,000-125,000	113	135	81	29	15	373
\$125,000-150,000	25	33	17	13	15	103
\$150,000-200,000	29	54	30	23	14	150
\$200,000+	22	66	13	12	4	122
<b>Total</b>	<b>4,595</b>	<b>3,322</b>	<b>1,101</b>	<b>648</b>	<b>565</b>	<b>10,231</b>

Owner Households						
All Age Groups						
Base Year: 2006 - 2010 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,938	602	548	192	193	3,473
\$10,000-20,000	2,141	1,017	448	215	174	3,995
\$20,000-30,000	1,021	1,006	352	447	310	3,136
\$30,000-40,000	1,041	834	665	259	365	3,164
\$40,000-50,000	703	1,031	364	330	333	2,761
\$50,000-60,000	653	857	534	198	227	2,469
\$60,000-75,000	605	861	703	336	348	2,853
\$75,000-100,000	412	338	441	432	543	2,666
\$100,000-125,000	136	434	347	295	191	1,423
\$125,000-150,000	61	121	175	186	100	643
\$150,000-200,000	61	278	167	83	108	697
\$200,000+	101	132	84	27	64	478
<b>Total</b>	<b>8,893</b>	<b>8,011</b>	<b>4,828</b>	<b>3,070</b>	<b>2,956</b>	<b>27,758</b>

HISTA 2.2 Summary Data Philadelphia, PA PMA nielsen

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**Percent Owner Households**  
Age 15 to 54 Years  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	3.3%	1.8%	3.3%	1.0%	0.6%	10.1%
\$10,000-20,000	2.5%	2.2%	1.2%	0.8%	0.8%	7.4%
\$20,000-30,000	2.0%	2.2%	1.6%	2.6%	1.7%	10.0%
\$30,000-40,000	3.5%	2.7%	3.2%	0.8%	1.8%	12.0%
\$40,000-50,000	2.0%	3.5%	1.5%	1.7%	2.2%	10.9%
\$50,000-60,000	2.3%	3.0%	2.7%	0.9%	1.0%	9.8%
\$60,000-75,000	2.1%	3.8%	3.6%	1.7%	2.2%	13.4%
\$75,000-100,000	1.5%	2.7%	1.9%	2.6%	3.4%	12.1%
\$100,000-125,000	0.1%	1.5%	1.6%	1.8%	1.2%	6.2%
\$125,000-150,000	0.2%	0.5%	1.1%	1.2%	0.3%	3.2%
\$150,000-200,000	0.1%	1.2%	0.7%	0.4%	0.6%	3.0%
\$200,000+	0.2%	0.3%	0.3%	0.6%	0.4%	1.9%
<b>Total</b>	<b>19.8%</b>	<b>25.3%</b>	<b>22.7%</b>	<b>16.1%</b>	<b>16.2%</b>	<b>100.0%</b>

**Percent Owner Households**  
Aged 55+ Years  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	10.4%	2.5%	0.8%	0.4%	0.7%	14.8%
\$10,000-20,000	12.6%	5.1%	2.0%	0.8%	0.4%	20.8%
\$20,000-30,000	5.2%	4.9%	1.0%	0.7%	0.6%	12.5%
\$30,000-40,000	4.0%	3.3%	1.7%	1.0%	0.8%	10.8%
\$40,000-50,000	3.0%	3.5%	1.1%	0.7%	0.3%	9.1%
\$50,000-60,000	2.4%	3.2%	1.2%	0.6%	0.7%	8.0%
\$60,000-75,000	2.2%	2.5%	1.5%	0.7%	0.4%	7.4%
\$75,000-100,000	1.5%	3.3%	1.3%	0.6%	0.6%	7.3%
\$100,000-125,000	1.0%	1.6%	0.9%	0.4%	0.2%	4.1%
\$125,000-150,000	0.3%	0.4%	0.2%	0.2%	0.4%	1.5%
\$150,000-200,000	0.3%	0.8%	0.5%	0.2%	0.2%	2.1%
\$200,000+	0.5%	0.6%	0.3%	0.1%	0.1%	1.5%
<b>Total</b>	<b>43.3%</b>	<b>32.2%</b>	<b>12.5%</b>	<b>6.4%</b>	<b>5.5%</b>	<b>100.0%</b>

**Percent Owner Households**  
Aged 62+ Years  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	11.4%	2.7%	0.9%	0.4%	0.6%	16.0%
\$10,000-20,000	15.4%	5.8%	1.7%	0.8%	0.4%	24.1%
\$20,000-30,000	5.5%	5.6%	1.3%	0.8%	0.8%	13.9%
\$30,000-40,000	4.1%	3.7%	1.4%	1.1%	1.0%	11.2%
\$40,000-50,000	2.1%	3.9%	1.1%	0.8%	0.3%	8.2%
\$50,000-60,000	1.7%	3.5%	0.9%	0.6%	0.8%	7.6%
\$60,000-75,000	1.6%	1.9%	1.2%	0.8%	0.4%	5.8%
\$75,000-100,000	1.2%	2.5%	1.0%	0.5%	0.6%	5.8%
\$100,000-125,000	1.1%	1.3%	0.8%	0.3%	0.1%	3.6%
\$125,000-150,000	0.2%	0.3%	0.2%	0.1%	0.1%	1.0%
\$150,000-200,000	0.3%	0.5%	0.3%	0.2%	0.1%	1.5%
\$200,000+	0.3%	0.6%	0.1%	0.1%	0.0%	1.2%
<b>Total</b>	<b>44.9%</b>	<b>32.5%</b>	<b>10.8%</b>	<b>6.3%</b>	<b>5.5%</b>	<b>100.0%</b>

**Percent Owner Households**  
All Age Groups  
Base Year: 2006 - 2010 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	7.0%	2.2%	2.0%	0.7%	0.7%	12.5%
\$10,000-20,000	7.7%	3.7%	1.6%	0.8%	0.6%	14.4%
\$20,000-30,000	3.7%	3.6%	1.3%	1.6%	1.1%	11.3%
\$30,000-40,000	3.8%	3.0%	2.6%	0.9%	1.3%	11.4%
\$40,000-50,000	2.5%	3.7%	1.3%	1.2%	1.2%	9.9%
\$50,000-60,000	2.4%	3.1%	1.9%	0.7%	0.8%	8.9%
\$60,000-75,000	2.2%	3.1%	2.5%	1.2%	1.3%	10.3%
\$75,000-100,000	1.5%	3.0%	1.6%	1.6%	2.0%	9.6%
\$100,000-125,000	0.6%	1.6%	1.3%	1.1%	0.7%	5.1%
\$125,000-150,000	0.2%	0.4%	0.6%	0.7%	0.4%	2.3%
\$150,000-200,000	0.2%	1.0%	0.6%	0.3%	0.4%	2.5%
\$200,000+	0.4%	0.5%	0.3%	0.3%	0.2%	1.7%
<b>Total</b>	<b>32.0%</b>	<b>28.9%</b>	<b>17.4%</b>	<b>11.1%</b>	<b>10.6%</b>	<b>100.0%</b>

Renter Households						
Age 15 to 54 Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	4,050	1,695	1,361	698	817	8,621
\$10,000-20,000	1,508	1,281	699	485	347	4,320
\$20,000-30,000	1,152	973	442	394	465	3,426
\$30,000-40,000	1,382	774	390	441	261	3,248
\$40,000-50,000	990	515	346	109	162	2,122
\$50,000-60,000	419	382	340	235	118	1,494
\$60,000-75,000	272	468	220	122	239	1,321
\$75,000-100,000	360	700	198	109	147	1,514
\$100,000-125,000	73	289	212	45	80	699
\$125,000-150,000	55	81	103	67	38	344
\$150,000-200,000	93	52	63	20	16	244
\$200,000+	101	87	25	16	19	248
<b>Total</b>	<b>10,455</b>	<b>7,297</b>	<b>4,399</b>	<b>2,741</b>	<b>2,709</b>	<b>27,601</b>

Renter Households						
Aged 55+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	2,560	359	129	37	35	3,120
\$10,000-20,000	2,072	517	153	91	45	2,878
\$20,000-30,000	773	313	160	37	38	1,321
\$30,000-40,000	553	206	57	48	58	922
\$40,000-50,000	254	153	42	33	37	519
\$50,000-60,000	186	92	29	22	25	354
\$60,000-75,000	243	85	25	28	25	406
\$75,000-100,000	130	69	34	24	23	280
\$100,000-125,000	130	81	39	18	17	285
\$125,000-150,000	64	23	6	13	10	116
\$150,000-200,000	45	36	10	10	11	112
\$200,000+	24	28	12	9	6	79
<b>Total</b>	<b>7,034</b>	<b>1,962</b>	<b>696</b>	<b>370</b>	<b>330</b>	<b>10,392</b>

Renter Households						
Aged 62+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,593	202	83	23	26	1,927
\$10,000-20,000	1,748	335	83	41	38	2,245
\$20,000-30,000	500	166	91	33	25	815
\$30,000-40,000	375	133	39	23	26	596
\$40,000-50,000	131	54	36	19	16	256
\$50,000-60,000	118	55	19	20	15	227
\$60,000-75,000	138	68	19	14	15	254
\$75,000-100,000	58	32	26	19	16	151
\$100,000-125,000	80	40	29	15	13	177
\$125,000-150,000	30	15	2	10	4	61
\$150,000-200,000	25	17	8	8	8	66
\$200,000+	17	15	7	7	6	52
<b>Total</b>	<b>4,813</b>	<b>1,132</b>	<b>442</b>	<b>232</b>	<b>208</b>	<b>6,827</b>

Renter Households						
All Age Groups						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	6,610	2,054	1,490	735	852	11,741
\$10,000-20,000	3,580	1,798	852	576	392	7,198
\$20,000-30,000	1,925	1,286	602	431	503	4,747
\$30,000-40,000	1,955	980	447	489	319	4,170
\$40,000-50,000	1,244	668	388	142	199	2,641
\$50,000-60,000	605	474	369	257	143	1,848
\$60,000-75,000	515	553	245	150	264	1,727
\$75,000-100,000	490	769	232	133	170	1,794
\$100,000-125,000	203	370	251	63	97	984
\$125,000-150,000	119	104	109	80	48	460
\$150,000-200,000	138	88	73	30	27	356
\$200,000+	125	115	57	25	25	327
<b>Total</b>	<b>17,489</b>	<b>9,259</b>	<b>5,095</b>	<b>3,111</b>	<b>3,039</b>	<b>37,993</b>

Percent Renter Households						
Age 15 to 54 Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	14.7%	6.1%	4.9%	2.5%	3.0%	31.2%
\$10,000-20,000	5.5%	4.6%	2.5%	1.8%	1.3%	15.7%
\$20,000-30,000	4.2%	3.5%	1.6%	1.4%	1.7%	12.4%
\$30,000-40,000	5.0%	2.8%	1.4%	1.6%	0.9%	11.8%
\$40,000-50,000	3.6%	1.9%	1.3%	0.4%	0.6%	7.7%
\$50,000-60,000	1.5%	1.4%	1.2%	0.9%	0.4%	5.4%
\$60,000-75,000	1.0%	1.7%	0.8%	0.4%	0.9%	4.8%
\$75,000-100,000	1.3%	2.5%	0.7%	0.4%	0.5%	5.5%
\$100,000-125,000	0.3%	1.0%	0.8%	0.2%	0.3%	2.5%
\$125,000-150,000	0.2%	0.3%	0.4%	0.2%	0.1%	1.2%
\$150,000-200,000	0.3%	0.2%	0.2%	0.1%	0.1%	0.9%
\$200,000+	0.4%	0.3%	0.1%	0.1%	0.1%	0.9%
<b>Total</b>	<b>37.9%</b>	<b>26.4%</b>	<b>15.9%</b>	<b>9.9%</b>	<b>9.8%</b>	<b>100.0%</b>

Percent Renter Households						
Aged 55+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	24.6%	3.5%	1.3%	0.4%	0.3%	30.0%
\$10,000-20,000	19.5%	5.0%	1.5%	0.5%	0.4%	27.7%
\$20,000-30,000	7.4%	3.0%	1.5%	0.4%	0.4%	12.7%
\$30,000-40,000	5.3%	2.0%	0.5%	0.5%	0.6%	8.9%
\$40,000-50,000	2.4%	1.5%	0.4%	0.3%	0.4%	5.0%
\$50,000-60,000	1.8%	0.9%	0.3%	0.2%	0.2%	3.4%
\$60,000-75,000	2.3%	0.8%	0.2%	0.3%	0.2%	3.9%
\$75,000-100,000	1.3%	0.7%	0.3%	0.2%	0.2%	2.7%
\$100,000-125,000	1.3%	0.8%	0.4%	0.2%	0.2%	2.7%
\$125,000-150,000	0.6%	0.2%	0.1%	0.1%	0.1%	1.1%
\$150,000-200,000	0.4%	0.3%	0.1%	0.1%	0.1%	1.1%
\$200,000+	0.2%	0.3%	0.1%	0.1%	0.1%	0.8%
<b>Total</b>	<b>67.7%</b>	<b>18.9%</b>	<b>6.7%</b>	<b>3.6%</b>	<b>3.2%</b>	<b>100.0%</b>

Percent Renter Households						
Aged 62+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	23.3%	3.0%	1.2%	0.3%	0.4%	28.2%
\$10,000-20,000	25.6%	4.9%	1.2%	0.6%	0.6%	32.9%
\$20,000-30,000	7.3%	2.4%	1.3%	0.5%	0.4%	11.9%
\$30,000-40,000	5.5%	1.9%	0.6%	0.3%	0.4%	8.7%
\$40,000-50,000	1.9%	0.8%	0.5%	0.3%	0.2%	3.7%
\$50,000-60,000	1.7%	0.8%	0.3%	0.3%	0.2%	3.3%
\$60,000-75,000	2.0%	1.0%	0.3%	0.2%	0.2%	3.7%
\$75,000-100,000	0.8%	0.5%	0.4%	0.3%	0.2%	2.2%
\$100,000-125,000	1.2%	0.6%	0.4%	0.2%	0.2%	2.6%
\$125,000-150,000	0.4%	0.2%	0.0%	0.1%	0.1%	0.9%
\$150,000-200,000	0.4%	0.2%	0.1%	0.1%	0.1%	1.0%
\$200,000+	0.2%	0.2%	0.1%	0.1%	0.1%	0.8%
<b>Total</b>	<b>70.5%</b>	<b>16.6%</b>	<b>6.5%</b>	<b>3.4%</b>	<b>3.0%</b>	<b>100.0%</b>

Percent Renter Households						
All Age Groups						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	17.4%	5.4%	3.9%	1.9%	2.2%	30.9%
\$10,000-20,000	9.4%	4.7%	2.2%	1.5%	1.0%	18.9%
\$20,000-30,000	5.1%	3.4%	1.6%	1.1%	1.3%	12.5%
\$30,000-40,000	5.1%	2.6%	1.2%	1.5%	0.8%	11.0%
\$40,000-50,000	3.3%	1.8%	1.0%	0.4%	0.5%	7.0%
\$50,000-60,000	1.6%	1.2%	1.0%	0.7%	0.4%	4.9%
\$60,000-75,000	1.4%	1.5%	0.6%	0.4%	0.4%	4.7%
\$75,000-100,000	1.3%	2.0%	0.6%	0.4%	0.4%	4.7%
\$100,000-125,000	0.5%	1.0%	0.7%	0.2%	0.3%	2.6%
\$125,000-150,000	0.3%	0.3%	0.3%	0.2%	0.1%	1.2%
\$150,000-200,000	0.4%	0.2%	0.2%	0.1%	0.1%	0.9%
\$200,000+	0.3%	0.3%	0.1%	0.1%	0.1%	0.9%
<b>Total</b>	<b>46.0%</b>	<b>24.4%</b>	<b>13.4%</b>	<b>8.2%</b>	<b>8.0%</b>	<b>100.0%</b>



Owner Households						
Age 15 to 54 Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	435	239	411	178	136	1,399
\$10,000-20,000	290	262	192	116	107	967
\$20,000-30,000	309	294	229	301	226	1,359
\$30,000-40,000	372	257	427	123	248	1,427
\$40,000-50,000	210	414	242	221	295	1,382
\$50,000-60,000	318	410	320	169	125	1,282
\$60,000-75,000	206	431	404	221	281	1,543
\$75,000-100,000	182	294	231	364	428	1,499
\$100,000-125,000	8	189	187	232	142	758
\$125,000-150,000	42	50	138	116	66	412
\$150,000-200,000	15	231	77	54	69	446
\$200,000+	48	40	51	52	52	245
<b>Total</b>	<b>2,435</b>	<b>3,111</b>	<b>2,909</b>	<b>2,088</b>	<b>2,176</b>	<b>12,719</b>

Owner Households						
Aged 55+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,642	411	121	84	110	2,368
\$10,000-20,000	1,932	838	372	141	58	3,341
\$20,000-30,000	880	897	200	136	82	2,195
\$30,000-40,000	598	468	278	169	103	1,616
\$40,000-50,000	457	514	162	111	46	1,290
\$50,000-60,000	293	465	185	74	118	1,135
\$60,000-75,000	322	400	236	115	68	1,141
\$75,000-100,000	222	512	216	88	87	1,125
\$100,000-125,000	131	194	89	48	32	494
\$125,000-150,000	44	78	31	28	48	229
\$150,000-200,000	49	93	69	34	18	263
\$200,000+	71	105	42	18	19	256
<b>Total</b>	<b>6,641</b>	<b>4,975</b>	<b>2,002</b>	<b>1,046</b>	<b>789</b>	<b>15,453</b>

Owner Households						
Aged 62+ Years						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	1,172	306	101	57	68	1,704
\$10,000-20,000	1,679	669	236	97	39	2,720
\$20,000-30,000	673	688	181	104	76	1,722
\$30,000-40,000	424	357	172	134	80	1,167
\$40,000-50,000	209	331	105	85	32	763
\$50,000-60,000	136	358	107	55	98	754
\$60,000-75,000	195	267	138	96	52	748
\$75,000-100,000	138	268	116	49	60	631
\$100,000-125,000	101	91	58	21	21	294
\$125,000-150,000	29	55	14	14	20	132
\$150,000-200,000	34	47	28	26	10	145
\$200,000+	45	87	23	13	2	170
<b>Total</b>	<b>4,835</b>	<b>3,526</b>	<b>1,280</b>	<b>751</b>	<b>558</b>	<b>10,950</b>

Owner Households						
All Age Groups						
Year 2014 Estimates						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	2,077	650	532	262	246	3,767
\$10,000-20,000	2,222	1,100	564	257	165	4,308
\$20,000-30,000	1,189	1,191	429	437	308	3,554
\$30,000-40,000	970	725	705	292	351	3,043
\$40,000-50,000	667	928	404	532	341	2,672
\$50,000-60,000	611	875	505	183	243	2,417
\$60,000-75,000	528	831	640	336	349	2,684
\$75,000-100,000	404	806	447	452	515	2,624
\$100,000-125,000	139	383	276	280	174	1,252
\$125,000-150,000	86	128	169	144	114	641
\$150,000-200,000	64	324	146	88	87	709
\$200,000+	112	145	91	71	72	591
<b>Total</b>	<b>9,076</b>	<b>8,086</b>	<b>4,911</b>	<b>3,134</b>	<b>2,965</b>	<b>28,172</b>

**Percent Owner Households**  
Age 15 to 54 Years  
Year 2014 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	3.4%	1.9%	1.2%	1.4%	1.1%	11.0%
\$10,000-20,000	2.3%	2.1%	1.5%	0.9%	0.8%	7.6%
\$20,000-30,000	2.4%	2.3%	1.8%	2.4%	1.8%	10.7%
\$30,000-40,000	2.9%	2.0%	3.4%	1.0%	1.9%	11.2%
\$40,000-50,000	1.7%	3.3%	1.9%	1.7%	2.3%	10.9%
\$50,000-60,000	2.5%	3.2%	2.5%	0.9%	1.0%	10.1%
\$60,000-75,000	1.6%	3.4%	3.2%	1.7%	2.2%	12.1%
\$75,000-100,000	1.4%	2.3%	1.8%	2.9%	3.4%	11.8%
\$100,000-125,000	0.1%	1.5%	1.5%	1.8%	1.1%	6.0%
\$125,000-150,000	0.3%	0.4%	1.1%	0.9%	0.5%	3.2%
\$150,000-200,000	0.1%	1.8%	0.6%	0.4%	0.5%	3.5%
\$200,000+	0.8%	0.3%	0.4%	0.4%	0.4%	1.9%
<b>Total</b>	<b>19.1%</b>	<b>24.5%</b>	<b>22.9%</b>	<b>16.4%</b>	<b>17.1%</b>	<b>100.0%</b>

**Percent Owner Households**  
Aged 55+ Years  
Year 2014 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	10.6%	2.7%	0.8%	0.5%	0.7%	15.3%
\$10,000-20,000	12.5%	5.4%	2.4%	0.9%	0.4%	21.6%
\$20,000-30,000	5.7%	5.8%	1.3%	0.9%	0.5%	14.2%
\$30,000-40,000	3.9%	3.0%	1.8%	1.1%	0.7%	10.5%
\$40,000-50,000	3.0%	3.3%	1.0%	0.7%	0.3%	8.3%
\$50,000-60,000	1.9%	3.0%	1.2%	0.5%	0.8%	7.3%
\$60,000-75,000	2.1%	2.6%	1.5%	0.7%	0.4%	7.4%
\$75,000-100,000	1.4%	3.3%	1.4%	0.6%	0.6%	7.3%
\$100,000-125,000	0.8%	1.3%	0.6%	0.3%	0.2%	3.2%
\$125,000-150,000	0.3%	0.5%	0.2%	0.2%	0.3%	1.5%
\$150,000-200,000	0.3%	0.6%	0.4%	0.2%	0.1%	1.7%
\$200,000+	0.5%	0.2%	0.3%	0.1%	0.1%	1.2%
<b>Total</b>	<b>43.0%</b>	<b>32.2%</b>	<b>13.0%</b>	<b>6.8%</b>	<b>5.1%</b>	<b>100.0%</b>

**Percent Owner Households**  
Aged 62+ Years  
Year 2014 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	10.7%	2.8%	0.9%	0.5%	0.6%	15.6%
\$10,000-20,000	15.3%	6.1%	2.2%	0.9%	0.4%	24.8%
\$20,000-30,000	6.1%	6.3%	1.7%	0.9%	0.7%	15.7%
\$30,000-40,000	3.5%	3.3%	1.6%	1.2%	0.7%	10.7%
\$40,000-50,000	1.9%	3.6%	1.0%	0.8%	0.3%	7.0%
\$50,000-60,000	1.2%	3.3%	1.0%	0.5%	0.9%	6.9%
\$60,000-75,000	1.8%	2.4%	1.3%	0.9%	0.5%	6.8%
\$75,000-100,000	1.3%	2.4%	1.1%	0.4%	0.5%	5.8%
\$100,000-125,000	0.9%	0.8%	0.5%	0.2%	0.2%	2.7%
\$125,000-150,000	0.3%	0.5%	0.1%	0.1%	0.2%	1.2%
\$150,000-200,000	0.3%	0.4%	0.3%	0.2%	0.1%	1.3%
\$200,000+	0.4%	0.8%	0.2%	0.1%	0.0%	1.6%
<b>Total</b>	<b>44.2%</b>	<b>32.2%</b>	<b>11.7%</b>	<b>6.9%</b>	<b>5.1%</b>	<b>100.0%</b>

**Percent Owner Households**  
All Age Groups  
Year 2014 Estimates

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	7.4%	2.3%	1.9%	0.9%	0.9%	13.4%
\$10,000-20,000	7.9%	3.9%	2.0%	0.9%	0.6%	15.3%
\$20,000-30,000	4.2%	4.2%	1.5%	1.6%	1.1%	12.6%
\$30,000-40,000	3.4%	2.6%	2.5%	1.0%	1.2%	10.8%
\$40,000-50,000	2.4%	3.3%	1.4%	1.2%	1.2%	9.5%
\$50,000-60,000	2.2%	3.1%	1.8%	0.6%	0.9%	8.6%
\$60,000-75,000	1.9%	2.9%	2.3%	1.2%	1.2%	9.5%
\$75,000-100,000	1.4%	2.9%	1.6%	1.6%	1.8%	9.3%
\$100,000-125,000	0.5%	1.4%	1.0%	1.0%	0.6%	4.4%
\$125,000-150,000	0.3%	0.5%	0.6%	0.5%	0.4%	2.3%
\$150,000-200,000	0.2%	1.2%	0.3%	0.3%	0.3%	2.5%
\$200,000+	0.4%	0.5%	0.3%	0.3%	0.3%	1.8%
<b>Total</b>	<b>32.2%</b>	<b>28.7%</b>	<b>17.4%</b>	<b>11.1%</b>	<b>10.5%</b>	<b>100.0%</b>

Renter Households						
Age 15 to 54 Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+Person Household	Total
\$0-10,000	3,735	1,544	1,271	651	785	7,986
\$10,000-20,000	1,498	1,167	645	476	341	4,127
\$20,000-30,000	1,136	896	428	379	430	3,269
\$30,000-40,000	1,371	737	378	455	277	3,218
\$40,000-50,000	1,165	570	387	110	161	2,393
\$50,000-60,000	438	383	334	237	128	1,520
\$60,000-75,000	335	544	233	140	244	1,496
\$75,000-100,000	384	806	227	126	171	1,714
\$100,000-125,000	100	346	291	56	104	897
\$125,000-150,000	74	111	136	74	47	442
\$150,000-200,000	115	77	94	35	32	353
\$200,000+	161	145	44	26	32	413
<b>Total</b>	<b>10,512</b>	<b>7,326</b>	<b>4,468</b>	<b>2,765</b>	<b>2,757</b>	<b>27,828</b>

Renter Households						
Aged 55+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+Person Household	Total
\$0-10,000	2,625	353	139	35	37	3,189
\$10,000-20,000	2,220	558	144	95	48	3,065
\$20,000-30,000	819	331	171	38	33	1,392
\$30,000-40,000	596	223	59	50	50	978
\$40,000-50,000	316	181	41	35	39	612
\$50,000-60,000	190	94	35	29	28	376
\$60,000-75,000	278	87	36	29	26	456
\$75,000-100,000	144	100	38	29	20	331
\$100,000-125,000	171	117	55	16	16	375
\$125,000-150,000	110	39	5	18	16	188
\$150,000-200,000	84	49	12	10	10	165
\$200,000+	42	44	18	11	11	133
<b>Total</b>	<b>7,602</b>	<b>2,176</b>	<b>753</b>	<b>395</b>	<b>334</b>	<b>11,260</b>

Renter Households						
Aged 62+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+Person Household	Total
\$0-10,000	1,690	197	95	23	30	2,035
\$10,000-20,000	1,900	373	89	39	41	2,442
\$20,000-30,000	546	187	92	30	21	876
\$30,000-40,000	415	147	42	20	19	643
\$40,000-50,000	182	73	37	20	16	328
\$50,000-60,000	124	55	26	24	16	245
\$60,000-75,000	175	67	27	13	14	296
\$75,000-100,000	73	45	31	26	14	189
\$100,000-125,000	116	61	43	12	11	243
\$125,000-150,000	66	27	4	12	11	120
\$150,000-200,000	49	26	7	7	3	92
\$200,000+	38	22	2	2	10	75
<b>Total</b>	<b>5,374</b>	<b>1,287</b>	<b>502</b>	<b>235</b>	<b>206</b>	<b>7,604</b>

Renter Households						
All Age Groups						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+Person Household	Total
\$0-10,000	6,360	1,897	1,410	686	822	11,175
\$10,000-20,000	3,718	1,725	789	571	389	7,192
\$20,000-30,000	1,955	1,227	599	417	463	4,661
\$30,000-40,000	1,967	960	437	505	327	4,196
\$40,000-50,000	1,481	751	428	145	200	3,005
\$50,000-60,000	628	477	369	266	156	1,896
\$60,000-75,000	613	631	269	169	270	1,952
\$75,000-100,000	528	906	265	155	191	2,045
\$100,000-125,000	271	463	346	72	120	1,272
\$125,000-150,000	184	150	141	92	63	630
\$150,000-200,000	199	126	106	45	42	518
\$200,000+	210	182	62	32	48	546
<b>Total</b>	<b>18,114</b>	<b>9,502</b>	<b>5,221</b>	<b>3,160</b>	<b>3,091</b>	<b>39,088</b>

Percent Renter Households						
Age 15 to 54 Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	13.4%	5.5%	4.6%	2.3%	2.8%	28.7%
\$10,000-20,000	5.4%	4.2%	2.3%	1.7%	1.2%	14.8%
\$20,000-30,000	4.1%	3.2%	1.5%	1.4%	1.5%	11.7%
\$30,000-40,000	4.9%	2.6%	1.4%	1.6%	1.0%	11.6%
\$40,000-50,000	4.2%	2.0%	1.4%	0.4%	0.6%	8.6%
\$50,000-60,000	1.6%	1.4%	1.2%	0.9%	0.5%	5.5%
\$60,000-75,000	1.2%	2.0%	0.8%	0.5%	0.9%	5.4%
\$75,000-100,000	1.4%	2.9%	0.8%	0.5%	0.6%	6.2%
\$100,000-125,000	0.4%	1.2%	1.0%	0.2%	0.4%	3.2%
\$125,000-150,000	0.3%	0.4%	0.5%	0.3%	0.2%	1.6%
\$150,000-200,000	0.4%	0.3%	0.3%	0.1%	0.1%	1.3%
\$200,000+	0.6%	0.5%	0.2%	0.1%	0.1%	1.5%
<b>Total</b>	<b>37.8%</b>	<b>26.3%</b>	<b>16.1%</b>	<b>9.9%</b>	<b>9.9%</b>	<b>100.0%</b>

Percent Renter Households						
Aged 55+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	23.3%	3.1%	1.2%	0.3%	0.3%	28.3%
\$10,000-20,000	19.7%	5.0%	1.3%	0.8%	0.4%	27.2%
\$20,000-30,000	7.3%	2.9%	1.5%	0.3%	0.3%	12.4%
\$30,000-40,000	5.3%	2.0%	0.5%	0.4%	0.4%	8.7%
\$40,000-50,000	2.8%	1.6%	0.4%	0.3%	0.3%	5.4%
\$50,000-60,000	1.7%	0.8%	0.3%	0.3%	0.2%	3.3%
\$60,000-75,000	2.5%	0.8%	0.3%	0.3%	0.2%	4.0%
\$75,000-100,000	1.3%	0.9%	0.3%	0.3%	0.2%	2.9%
\$100,000-125,000	1.5%	1.0%	0.5%	0.1%	0.1%	3.3%
\$125,000-150,000	1.0%	0.3%	0.0%	0.2%	0.1%	1.7%
\$150,000-200,000	0.7%	0.4%	0.1%	0.1%	0.1%	1.5%
\$200,000+	0.4%	0.4%	0.2%	0.1%	0.1%	1.2%
<b>Total</b>	<b>67.5%</b>	<b>19.3%</b>	<b>6.7%</b>	<b>3.5%</b>	<b>3.0%</b>	<b>100.0%</b>

Percent Renter Households						
Aged 62+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	22.2%	2.6%	1.2%	0.3%	0.4%	26.8%
\$10,000-20,000	25.0%	4.9%	1.2%	0.5%	0.5%	32.1%
\$20,000-30,000	7.2%	2.5%	1.2%	0.4%	0.3%	11.5%
\$30,000-40,000	5.5%	1.9%	0.6%	0.3%	0.2%	8.5%
\$40,000-50,000	2.4%	1.0%	0.5%	0.3%	0.2%	4.3%
\$50,000-60,000	1.6%	0.7%	0.3%	0.3%	0.2%	3.2%
\$60,000-75,000	2.3%	0.9%	0.4%	0.2%	0.2%	3.9%
\$75,000-100,000	1.0%	0.6%	0.4%	0.3%	0.2%	2.5%
\$100,000-125,000	1.5%	0.8%	0.6%	0.2%	0.1%	3.2%
\$125,000-150,000	0.9%	0.4%	0.1%	0.2%	0.1%	1.6%
\$150,000-200,000	0.6%	0.3%	0.1%	0.1%	0.0%	1.2%
\$200,000+	0.5%	0.4%	0.1%	0.1%	0.1%	1.2%
<b>Total</b>	<b>70.7%</b>	<b>16.9%</b>	<b>6.6%</b>	<b>3.1%</b>	<b>2.7%</b>	<b>100.0%</b>

Percent Renter Households						
All Age Groups						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+-Person Household	Total
\$0-10,000	16.3%	4.9%	3.6%	1.8%	2.1%	28.6%
\$10,000-20,000	9.5%	4.4%	2.0%	1.5%	1.0%	18.4%
\$20,000-30,000	5.0%	3.1%	1.5%	1.1%	1.2%	11.9%
\$30,000-40,000	5.6%	2.5%	1.1%	1.3%	0.8%	10.7%
\$40,000-50,000	3.8%	1.9%	1.1%	0.4%	0.5%	7.7%
\$50,000-60,000	1.6%	1.2%	0.9%	0.7%	0.4%	4.9%
\$60,000-75,000	1.6%	1.6%	0.7%	0.4%	0.7%	5.0%
\$75,000-100,000	1.4%	2.3%	0.7%	0.4%	0.5%	5.2%
\$100,000-125,000	0.7%	1.2%	0.9%	0.2%	0.3%	3.3%
\$125,000-150,000	0.5%	0.4%	0.4%	0.2%	0.2%	1.6%
\$150,000-200,000	0.3%	0.3%	0.3%	0.1%	0.1%	1.3%
\$200,000+	0.5%	0.5%	0.2%	0.1%	0.1%	1.4%
<b>Total</b>	<b>46.3%</b>	<b>24.3%</b>	<b>13.4%</b>	<b>8.1%</b>	<b>7.9%</b>	<b>100.0%</b>

Owner Households						
Age 15 to 54 Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	358	166	346	153	115	1,118
\$10,000-20,000	251	223	179	103	91	847
\$20,000-30,000	272	254	190	251	181	1,148
\$30,000-40,000	339	243	382	105	219	1,288
\$40,000-50,000	219	373	244	191	288	1,315
\$50,000-60,000	292	360	290	90	116	1,148
\$60,000-75,000	209	409	380	228	268	1,494
\$75,000-100,000	187	268	247	353	476	1,531
\$100,000-125,000	7	204	216	288	169	884
\$125,000-150,000	63	56	170	157	76	522
\$150,000-200,000	13	268	92	59	75	507
\$200,000+	81	37	68	78	67	331
<b>Total</b>	<b>2,271</b>	<b>2,861</b>	<b>2,804</b>	<b>2,056</b>	<b>2,141</b>	<b>12,133</b>

Owner Households						
Aged 55+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	1,663	417	118	70	98	2,366
\$10,000-20,000	1,958	813	354	141	48	3,314
\$20,000-30,000	898	895	211	153	77	2,234
\$30,000-40,000	638	505	304	190	103	1,740
\$40,000-50,000	475	606	184	114	58	1,437
\$50,000-60,000	300	490	189	74	125	1,178
\$60,000-75,000	388	442	272	128	73	1,303
\$75,000-100,000	264	617	250	104	97	1,332
\$100,000-125,000	178	249	129	63	43	662
\$125,000-150,000	55	96	40	29	56	276
\$150,000-200,000	54	124	71	36	26	311
\$200,000+	112	142	66	22	34	393
<b>Total</b>	<b>6,990</b>	<b>5,396</b>	<b>2,188</b>	<b>1,134</b>	<b>838</b>	<b>16,546</b>

Owner Households						
Aged 62+ Years						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	1,212	312	101	46	59	1,730
\$10,000-20,000	1,724	656	225	95	33	2,733
\$20,000-30,000	705	706	190	122	72	1,795
\$30,000-40,000	459	401	204	148	83	1,295
\$40,000-50,000	229	390	125	89	38	871
\$50,000-60,000	149	384	110	55	104	802
\$60,000-75,000	249	295	164	106	57	871
\$75,000-100,000	163	326	138	59	69	755
\$100,000-125,000	139	128	87	29	26	409
\$125,000-150,000	36	60	21	11	30	158
\$150,000-200,000	46	69	29	29	14	187
\$200,000+	78	119	32	28	2	267
<b>Total</b>	<b>5,189</b>	<b>3,846</b>	<b>1,433</b>	<b>817</b>	<b>588</b>	<b>11,873</b>

Owner Households						
All Age Groups						
Year 2019 Projections						
	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	2,001	583	464	223	213	3,484
\$10,000-20,000	2,209	1,036	533	244	139	4,161
\$20,000-30,000	1,170	1,149	401	404	258	3,382
\$30,000-40,000	977	748	686	295	322	3,028
\$40,000-50,000	694	979	428	305	346	2,752
\$50,000-60,000	592	850	479	164	241	2,326
\$60,000-75,000	597	851	652	356	341	2,797
\$75,000-100,000	451	885	497	457	573	2,863
\$100,000-125,000	185	453	345	351	212	1,546
\$125,000-150,000	118	157	210	186	132	799
\$150,000-200,000	67	392	163	95	101	818
\$200,000+	200	172	134	110	101	724
<b>Total</b>	<b>9,261</b>	<b>8,257</b>	<b>4,992</b>	<b>3,190</b>	<b>2,979</b>	<b>28,679</b>

**Percent Owner Households**  
Age 15 to 54 Years  
Year 2019 Projections

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	2.8%	1.4%	2.9%	1.3%	0.9%	9.2%
\$10,000-20,000	2.1%	1.8%	1.5%	0.8%	0.8%	7.0%
\$20,000-30,000	2.2%	2.1%	1.6%	2.1%	1.5%	9.5%
\$30,000-40,000	2.8%	2.0%	3.1%	0.9%	1.8%	10.6%
\$40,000-50,000	1.8%	3.1%	2.0%	1.6%	2.4%	10.8%
\$50,000-60,000	2.4%	3.0%	2.4%	0.7%	1.0%	9.5%
\$60,000-75,000	1.7%	3.4%	3.1%	1.9%	2.2%	12.3%
\$75,000-100,000	1.5%	2.2%	2.0%	2.9%	3.9%	12.6%
\$100,000-125,000	0.1%	1.7%	1.8%	2.4%	1.4%	7.3%
\$125,000-150,000	0.5%	0.5%	1.4%	1.3%	0.6%	4.3%
\$150,000-200,000	0.1%	2.2%	0.8%	0.5%	0.6%	4.2%
\$200,000+	0.7%	0.3%	0.6%	0.6%	0.6%	2.7%
<b>Total</b>	<b>18.7%</b>	<b>23.6%</b>	<b>23.1%</b>	<b>16.9%</b>	<b>17.6%</b>	<b>100.0%</b>

**Percent Owner Households**  
Aged 55+ Years  
Year 2019 Projections

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	10.1%	2.5%	0.7%	0.4%	0.6%	14.3%
\$10,000-20,000	11.8%	4.9%	2.1%	0.9%	0.3%	20.0%
\$20,000-30,000	5.4%	5.4%	1.3%	0.9%	0.5%	13.5%
\$30,000-40,000	3.9%	3.1%	1.8%	1.1%	0.6%	10.5%
\$40,000-50,000	2.9%	3.7%	1.1%	0.7%	0.4%	8.7%
\$50,000-60,000	1.8%	3.0%	1.1%	0.4%	0.8%	7.1%
\$60,000-75,000	2.3%	2.7%	1.6%	0.8%	0.4%	7.9%
\$75,000-100,000	1.6%	3.7%	1.5%	0.6%	0.6%	8.1%
\$100,000-125,000	1.1%	1.5%	0.8%	0.4%	0.3%	4.0%
\$125,000-150,000	0.3%	0.6%	0.2%	0.2%	0.3%	1.7%
\$150,000-200,000	0.3%	0.7%	0.4%	0.2%	0.2%	1.9%
\$200,000+	0.7%	0.2%	0.4%	0.2%	0.2%	2.4%
<b>Total</b>	<b>42.2%</b>	<b>32.6%</b>	<b>13.2%</b>	<b>6.9%</b>	<b>5.1%</b>	<b>100.0%</b>

**Percent Owner Households**  
Aged 62+ Years  
Year 2019 Projections

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	10.2%	2.6%	0.9%	0.4%	0.5%	14.6%
\$10,000-20,000	14.5%	3.5%	1.9%	0.8%	0.3%	23.0%
\$20,000-30,000	5.5%	3.9%	1.6%	1.0%	0.6%	15.1%
\$30,000-40,000	3.9%	3.4%	1.7%	1.2%	0.7%	10.9%
\$40,000-50,000	1.9%	3.3%	1.1%	0.7%	0.3%	7.3%
\$50,000-60,000	1.3%	3.2%	0.9%	0.5%	0.9%	6.8%
\$60,000-75,000	2.1%	2.5%	1.4%	0.9%	0.5%	7.3%
\$75,000-100,000	1.4%	2.7%	1.2%	0.5%	0.6%	6.4%
\$100,000-125,000	1.2%	1.1%	0.7%	0.2%	0.2%	3.4%
\$125,000-150,000	0.3%	0.5%	0.2%	0.1%	0.3%	1.3%
\$150,000-200,000	0.4%	0.6%	0.2%	0.2%	0.1%	1.6%
\$200,000+	0.7%	1.0%	0.3%	0.2%	0.0%	2.2%
<b>Total</b>	<b>43.7%</b>	<b>32.4%</b>	<b>12.1%</b>	<b>6.9%</b>	<b>5.0%</b>	<b>100.0%</b>

**Percent Owner Households**  
All Age Groups  
Year 2019 Projections

	1-Person Household	2-Person Household	3-Person Household	4-Person Household	5+ Person Household	Total
\$0-10,000	7.0%	2.0%	1.6%	0.8%	0.7%	12.1%
\$10,000-20,000	7.7%	3.6%	1.9%	0.9%	0.5%	14.5%
\$20,000-30,000	4.1%	4.0%	1.4%	1.4%	0.9%	11.8%
\$30,000-40,000	3.4%	2.6%	2.4%	1.0%	1.1%	10.6%
\$40,000-50,000	2.4%	3.4%	1.5%	1.1%	1.2%	9.6%
\$50,000-60,000	2.1%	3.0%	1.7%	0.6%	0.8%	8.1%
\$60,000-75,000	2.1%	3.0%	2.3%	1.2%	1.2%	9.8%
\$75,000-100,000	1.6%	3.1%	1.7%	1.0%	2.0%	10.0%
\$100,000-125,000	0.6%	1.6%	1.2%	1.2%	0.7%	5.4%
\$125,000-150,000	0.4%	0.5%	0.7%	0.6%	0.5%	2.8%
\$150,000-200,000	0.2%	1.4%	0.6%	0.3%	0.4%	2.9%
\$200,000+	0.7%	0.6%	0.5%	0.4%	0.4%	2.5%
<b>Total</b>	<b>32.3%</b>	<b>28.8%</b>	<b>17.4%</b>	<b>11.1%</b>	<b>10.4%</b>	<b>100.0%</b>



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Geographies Selected:

<u>Geocode/ID</u>	<u>State</u>	<u>County</u>	<u>ZIP Code Name</u>
19104	Pennsylvania	Philadelphia County	Philadelphia
19131	Pennsylvania	Philadelphia County	Philadelphia
19139	Pennsylvania	Philadelphia County	Philadelphia
19151	Pennsylvania	Philadelphia County	Philadelphia

## Building Designs





**Kitchen & Associates**  
 ARCHITECT  
 1000 Locust Street  
 Philadelphia, PA 19107  
 (215) 562-1000  
 www.kitchenandassociates.com

**PRINCEPHON**  
 Wymne Senior Residence  
 54th & Arlington Street  
 Philadelphia, PA 19131

**2**  
 FIRST FLOOR PLAN

**SECTION 04.00**  
**DEVELOPMENT / LUMBER / ROOFING**  
 (to be completed by the contractor)

Development Name: Wymne Senior Residence Date: 11/08/11  
 PIPA No.: 112 City: PHILADELPHIA

- Number of Quarters: 1
- Building Investigator: 2222
- Building Code: 10 Construction Type: 13
- Structural System: Reinforced Concrete
- Exterior Finish: Brick
- Roofing: Asphalt/Flt Shingles
- Other: None
- Number of Occupants: 120
- Number of Stories: 10
- Applicable Accessibility Regulations: ICC A117.1, ADA, ADAAG, Section 504, DHS, Public Law 108-189

Item	Qty	Unit	Description	Material	Notes
1	1	EA	Roofing	Asphalt/Flt Shingles	
2	1	EA	Roofing	Asphalt/Flt Shingles	
3	1	EA	Roofing	Asphalt/Flt Shingles	
4	1	EA	Roofing	Asphalt/Flt Shingles	
5	1	EA	Roofing	Asphalt/Flt Shingles	
6	1	EA	Roofing	Asphalt/Flt Shingles	
7	1	EA	Roofing	Asphalt/Flt Shingles	
8	1	EA	Roofing	Asphalt/Flt Shingles	
9	1	EA	Roofing	Asphalt/Flt Shingles	
10	1	EA	Roofing	Asphalt/Flt Shingles	
11	1	EA	Roofing	Asphalt/Flt Shingles	
12	1	EA	Roofing	Asphalt/Flt Shingles	
13	1	EA	Roofing	Asphalt/Flt Shingles	
14	1	EA	Roofing	Asphalt/Flt Shingles	
15	1	EA	Roofing	Asphalt/Flt Shingles	
16	1	EA	Roofing	Asphalt/Flt Shingles	
17	1	EA	Roofing	Asphalt/Flt Shingles	
18	1	EA	Roofing	Asphalt/Flt Shingles	
19	1	EA	Roofing	Asphalt/Flt Shingles	
20	1	EA	Roofing	Asphalt/Flt Shingles	
21	1	EA	Roofing	Asphalt/Flt Shingles	
22	1	EA	Roofing	Asphalt/Flt Shingles	
23	1	EA	Roofing	Asphalt/Flt Shingles	
24	1	EA	Roofing	Asphalt/Flt Shingles	
25	1	EA	Roofing	Asphalt/Flt Shingles	
26	1	EA	Roofing	Asphalt/Flt Shingles	
27	1	EA	Roofing	Asphalt/Flt Shingles	
28	1	EA	Roofing	Asphalt/Flt Shingles	
29	1	EA	Roofing	Asphalt/Flt Shingles	
30	1	EA	Roofing	Asphalt/Flt Shingles	

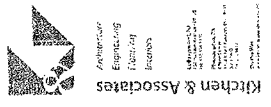
1. This drawing is prepared in accordance with the requirements of the International Building Code (IBC) and the International Residential Code (IRC) as adopted by the City of Philadelphia. It is intended to be used in conjunction with the other drawings in this set. 2. The contractor shall be responsible for obtaining all necessary permits and approvals from the appropriate authorities. 3. The contractor shall be responsible for ensuring that all work is completed in accordance with the specifications and requirements of the applicable codes and standards. 4. The contractor shall be responsible for ensuring that all work is completed in a timely and efficient manner. 5. The contractor shall be responsible for ensuring that all work is completed in a safe and sound manner. 6. The contractor shall be responsible for ensuring that all work is completed in a professional and courteous manner. 7. The contractor shall be responsible for ensuring that all work is completed in a clean and organized manner. 8. The contractor shall be responsible for ensuring that all work is completed in a cost-effective manner. 9. The contractor shall be responsible for ensuring that all work is completed in a manner that meets the needs and expectations of the client. 10. The contractor shall be responsible for ensuring that all work is completed in a manner that is consistent with the highest standards of quality and craftsmanship.

**1**  
 1ST FLOOR PLAN  
 1/8" = 1'-0"  
 1/4" = 3'-0"  
 1/2" = 6'-0"  
 3/4" = 9'-0"  
 1" = 12'-0"

**DRAWING LEGEND**  
 1. AGGREGATE  
 2. FINISH  
 3. PLASTER  
 4. CONCRETE

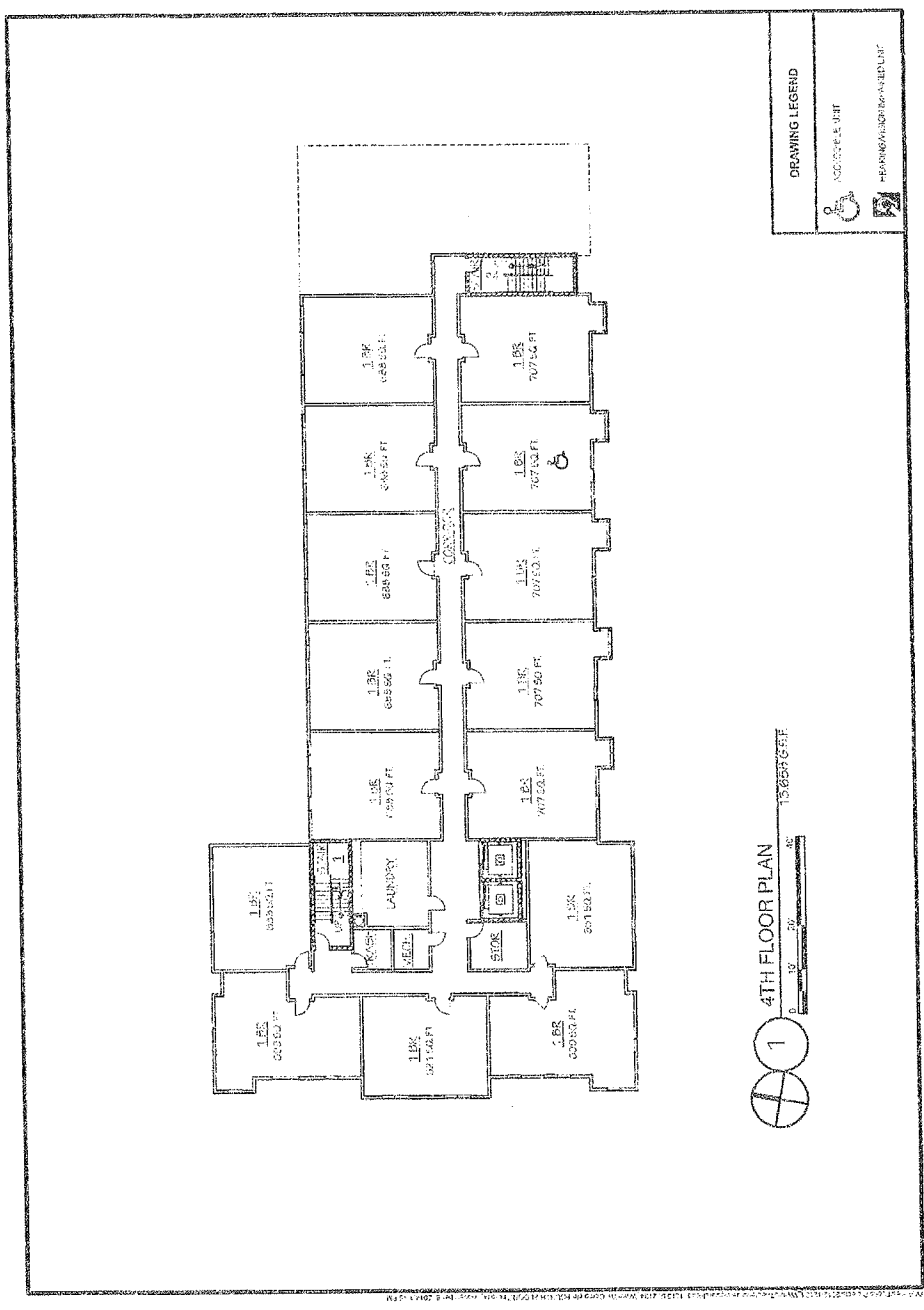






Project	1318 Locust Street, Philadelphia, PA 19104
Client	Wynne Senior Residence
Architect	Kitchen & Associates
Engineer	Kitchen & Associates
Planner	Kitchen & Associates
Interior Designer	Kitchen & Associates
Date	10/20/11
Scale	AS SHOWN
Sheet No.	5
Sheet Title	FLOOR PLAN

5  
FOURTH FLOOR



1 4TH FLOOR PLAN 1318LOCUST

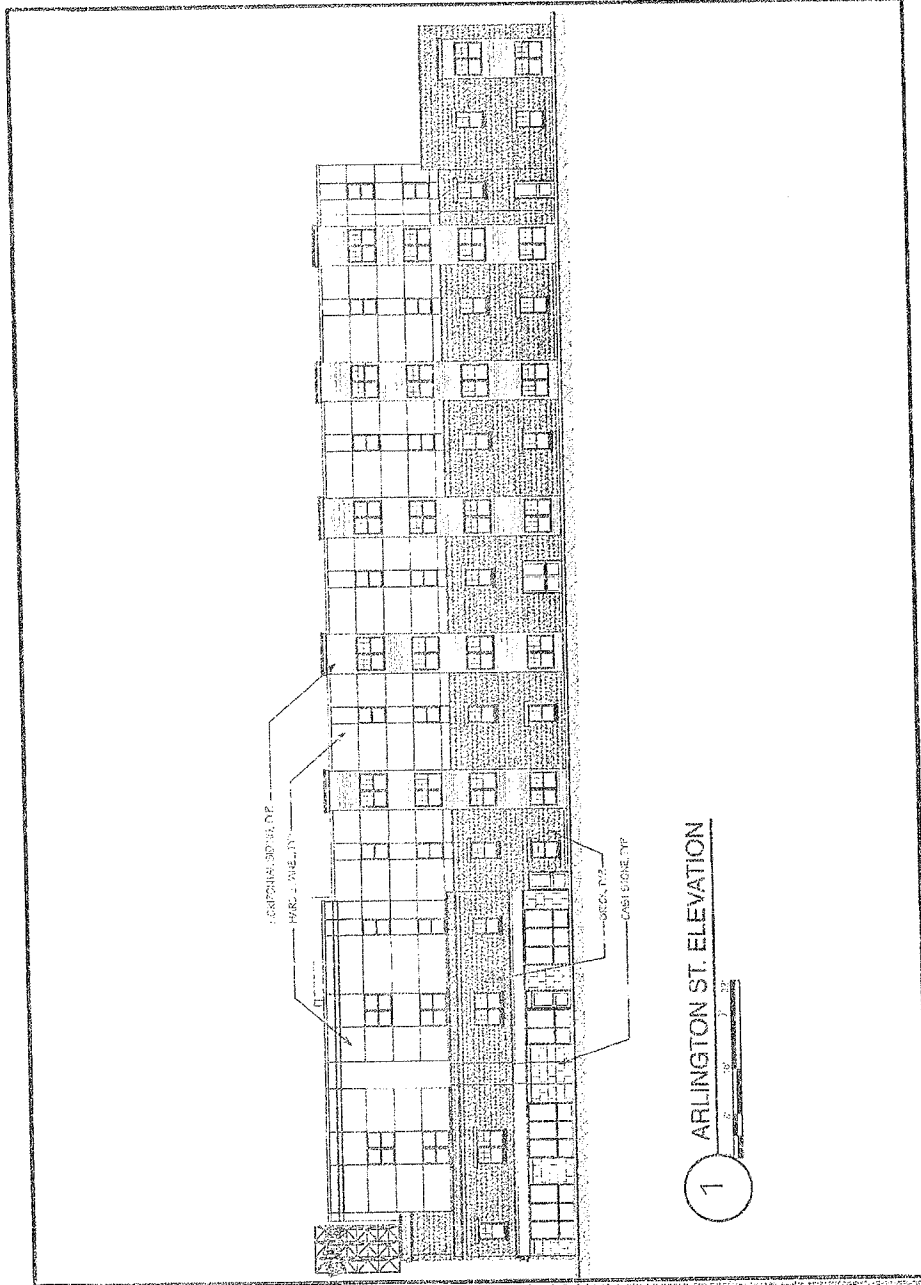
DRAWING LEGEND  
 ACCESSIBLE UNIT  
 REPAIRS/REWORK/REPLACE



**Kitchen & Associates**  
 ARCHITECTS  
 500 N. 10TH ST.  
 PHILADELPHIA, PA 19107  
 TEL: 215-592-1234  
 FAX: 215-592-1235  
 WWW: WWW.KITCHENANDASSOCIATES.COM

Wynne Senior Residence		54th & Arlington Streets Philadelphia, PA 19131	
<b>PENNINO 68</b>			
DATE	12/20/11	SCALE	AS SHOWN
PROJECT	Wynne Senior Residence	NO.	68
CLIENT	Wynne Senior Residence	DATE	12/20/11
DESIGNER	Kitchen & Associates	DATE	12/20/11

8  
 ARLINGTON ST.  
 ELEVATION



## Qualifications

## Qualifications of Jerome J. McHale, MAI

---

### Professional Position (1995-Present)

Principal in the firm of J. McHale & Associates, Inc. specializing in real estate appraisal and consulting services for all property types for a variety of purposes including financing, condemnation, ad valorem, matrimonial, and estate planning. The firm concentrates throughout the State of New Jersey and in the Philadelphia Metropolitan Area.

### Professional Certifications & Licenses

Member, *MAI*, Appraisal Institute, Certificate No. 10,302  
Certified General Appraiser (*# RC-0022*), State of New Jersey  
General Appraiser (*# G1-001359-B1*), Commonwealth of Pennsylvania  
Licensed Real Estate Sales Agent (*# SP-8735737*), State of New Jersey  
Certified Member, National Council of Affordable Housing Market Analysts

### Professional Experience

- 1988 - 1995 Staff Appraiser with the firm of Hurskowitz, Rosen & Walton with offices in Cherry Hill, New Jersey; Atlantic City, New Jersey; and Conshohocken, Pennsylvania. Specialized in appraisal services for financing, condemnation, ad valorem, and estate purposes.
- Real Estate Salesperson with the firm of Kingsway Realty, Inc. with offices in Cherry Hill, New Jersey and Woodbury Heights, New Jersey; specialized in the sale and leasing of residential and commercial property.
- 1986 - 1988 Staff Appraiser with the firm of F.P. Pietroski & Company with offices in Cherry Hill, New Jersey; Hingham, Massachusetts; and Portland, Maine. Specialized in appraisal services for financing, condemnation, ad valorem, and estate purposes.
- Real Estate Salesperson with the firm of Kruckner Real Estate, Inc., Medford, New Jersey; Specialized in the sale and leasing of residential property and vacant land.
- 1984 - 1986 Manager and Cost Analyst with the National Exchange Carrier Association located in Whippany, New Jersey. The company developed computer generated billing rate structures for the telephone industry.

### Scope Of Appraisal Activity

Actively engaged in real estate appraising and consulting services since 1986 with assignments including a variety of property types such as multi-family, farmland for preservation programs, banks, condominium developments, hotels and motor inns, industrial buildings, land office buildings, LIHTC & market rate rent & demand studies, residential developments, recreational facilities, restaurants, retail stores, shopping centers, and various special purpose properties including major petrochemical and oil refineries.

### Education

B.A., Economics & Business Administration, Fort Lewis College, Durango, Colorado

## Profession Related Courses & Seminars Attended

### Current – 2008

- "Uniform Appraisal Standards for Federal Land Acquisitions (Yellow Book)," September 2013
- "Complex Litigation Appraisal Case Studies", Appraisal Institute, March 2013
- "Marketability Studies: The Six-Step Process and Basic Applications", Appraisal Institute, March 2013
- "The State of the U.S. Real Estate Market", Appraisal Institute, September 2012
- "IRS Valuation", Appraisal Institute, July 2012
- "State Agriculture Development Committee, Farmland Preservation Program Annual Appraisal Conference", NJ Department of Agriculture, State Agriculture Development Committee, June 2012
- "Federal Agencies and Appraisal: Program Updates", Appraisal Institute, June 2012
- "Assessors & Appraisers in Today's Market", Appraisal Institute, April 2012
- "Fundamentals of Separating Real Property, Personal Property, and Intangible Assets", Appraisal Institute, March 2012
- "USPAP 2010-2011", Appraisal Institute, December 2011
- "Valuation for Financial Reporting", Appraisal Institute, November 2011
- "Solar Energy: A RE Appraiser's Overview", Appraisal Institute, September 2011
- "Green Acres Appraisal Conference", NJDEP, September 2011
- "PA Appraisal Statutes, Regulations and Board Policies", Appraisal Institute, June 2011
- "State Agriculture Development Committee Annual Appraisal Conference", NJSADC, June 2011
- "Income Capitalization in Today's Market", Appraisal Institute, May 2011
- "Marketability Analysis", Appraisal Institute, May 2011
- "Bones of Contention", Appraisal Institute, May 2011
- "NCAHMA '09 Public Policy & Market Study Forum", NCAHMA, April 2011
- "2011 Affordable Housing Policy & Underwriting Forum", National Housing & Rehabilitation Association, April 2011
- "New Jersey Pinelands", Appraisal Institute, November 2010
- "State Agriculture Development Committee Annual Appraisal Conference", NJSADC, June 2010
- "Farmland Assessment & Agriculture" Appraisal Institute, June 2010
- "Real Estate Market Overview", Appraisal Institute, April 2010
- "Business Practice & Ethics", Appraisal Institute, December 2009
- "SJ Redevelopment and Growth", Appraisal Institute, September 2009
- "National USPAP Equivalent Course", Appraisal Institute, July 2009
- "Appraising the Appraisal Business", Appraisal Institute, June 2009
- "Appraisal Tools Tune Up", Appraisal Institute, June 2009
- "Professional's Guide to the Fannie Mae 2-4 Unit Form 1025" Appraisal Institute, December 2007
- "Appraising For The New Jersey Farmland Preservation Program" - NJ Dept. of Agriculture, June 2007
- "Real Estate Finance, Value & Investment Performance" - Appraisal Institute, May 2007
- "USPAP Update" - Appraisal Institute, , October 2007
- "PA Appraisal Statutes, Regulations and Board Policies" - Appraisal Institute, June 2005
- "USPAP 7-Hour Update" - Appraisal Institute, June 2005
- "The Essentials: What every Appraiser should know" - Appraisal Institute, May 2005
- "Current Issues: Misconceptions in Appraisal" - Appraisal Institute, May 2005
- "Attacking & Defending an Appraisal" - Appraisal Institute, May 2005
- "Latest Trends in Hotel Valuation" - Appraisal Institute, May 2005
- "Maximizing the Value of an Appraisal Practice" - Appraisal Institute, May 2005
- "Appraisal Review" - Appraisal Institute, October 2003
- "Tax Appeals in Pennsylvania" -Philadelphia Bar Association, March 2003
- "Uniform Standards of Professional Appraisal Practice, Part C" - Appraisal Institute, December 2001
- "Attacking & Defending An Appraisal In Litigation" - Appraisal Institute, September 2001
- "Appraisal Review" - Appraisal Institute, July 2001
- "Appraising For The New Jersey Farmland Preservation Program" - NJ Dept. of Agriculture, June 2001
- "Section 8/ HUD Rent Comparability Studies & Standards" - Appraisal Institute, April 2001



"Overview of the New Jersey Green Acres Program" - NJDEP, January 2001

"Federal Land Exchanges & Acquisitions: Appraisal Issues & Applications" - Appraisal Institute & ASFMR, September 2000

#### **1999 - 1989**

"Appraisal of Nursing Facilities" - Appraisal Institute, December 1999

"Standards Of Professional Practice - Part B" - Appraisal Institute, Nov. 1999

"New Jersey Farmland Preservation Program" - State of New Jersey, June 1999

"Appraisal of Non-Conforming Uses" - Appraisal Institute, April 1999

"Valuation of Special Purpose Properties" - Appraisal Institute, November 1998

"Eminent Domain" - Appraisal Institute, November 1998

"Standards Of Professional Practice - Part A" - Appraisal Institute, August 1997

"Appraisal of Farmland" Trenton, NJ, June 1998

"Affordable Housing Valuation" - Appraisal Institute, January 1997

"First Annual Survey Of Property Tax Developments", January 1997

"Appraisal Of Retail Properties" - Appraisal Institute, March 1996

"New Jersey Farmland Preservation Program", May 1996

"Introduction to Lead Based Paint and Lead Inspection Training", December 1995

"The Dynamics of Office Building Valuation" - Appraisal Institute, December 1995

"New Jersey Tax Court Cases" Cherry Hill, NJ, May 1995

"The Appraisers Complete Review" - Appraisal Institute, July 1993

"Litigation Valuation" - Appraisal Institute, April 1992

"Report Writing & Valuation Analysis" - Appraisal Institute San Jose State University, July 1991

"Case Studies in Real Estate Valuation" - Appraisal Institute, Rutgers University, April 1990

"Capitalization Theory & Techniques, Part B" - Appraisal Institute, Rutgers University, October 1989

"Capitalization Theory & Techniques, Part A" - Appraisal Institute, Rutgers University, June 1989

### **Professional Speaking Engagements**

Loriman Education Services "Eminent Domain Practices"  
Cherry Hill, New Jersey, January 2008

Law Seminars International/PA Planning Association "Eminent Domain Practice & Procedure/Redevelopment After Kelo" Philadelphia, PA, November 2005

Loriman Education Services "NJ Tax Appeals – The Lawyer & Appraiser Relationship"  
Mount Laurel, New Jersey, March 2003

### **Positions Held with the Appraisal Institute (Southern New Jersey Chapter)**

- Past President – 2012 & 2001
- All Officer Positions
- 2013 Board Member

### **Expert Testimony**

Mr. McHale has qualified as an expert witness and has appeared before the United States Federal Bankruptcy Court, New Jersey Tax Court, New Jersey Superior Court, numerous New Jersey County Boards of Taxation, the Pennsylvania Court of Common Pleas, various Pennsylvania Boards of Appeal, and various Commissioner Panels for condemnation matters.

Tab 5. Site/Layout

Included in the section is:

- Site Map of the city and the Project location
- Building description
- Site plan and Drawings



TACOMT  
WISSINOM

FRANKFORD  
BRIDESBURG

JUNIATA PARK/  
FELTONVILLE

HARROWGATE  
FAIRHILL

PORT RICHMOND  
WEST KENSINGTON  
KENSINGTON

FISHTOWN  
LUDLOW

STANTON  
CECIL B. MOORE  
FAIRMOUNT  
POPLAR  
GALLOWHILL

Adventure Aquarium  
LANNING SQUARE  
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OGONTZ/  
FERN ROCK

HUNTING PARK  
NORTH PHILADELPHIA

ALLEGHENY WEST  
WYNNEFIELD

WYNNEFIELD HEIGHTS

Wynne Senior Residences  
The Mann Center

WEST PHILADELPHIA

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WISSAHICKON  
EAST FALLS

Bala Cynwyd

WYNNEFIELD HEIGHTS

WYNNEFIELD

Wynne Senior Residences  
The Mann Center

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Penn Valley

Narberth

Wynnewood

PENN WYNE

OVERBROOK

HIGHLAND PARK

DUNLAP

SPRUCE HILL

SQUIRREL HILL

ANGORA

KINGSSESSING

East Lansdowne

Lansdowne

Darby

Collingdale

Colwyn

Sharon Hill

den

more

Wynnewood

PENN WYNE

HIGHLAND PARK

DUNLAP

SPRUCE HILL

SQUIRREL HILL

ANGORA

KINGSSESSING

East Lansdowne

Lansdowne

Darby

Collingdale

Colwyn

Sharon Hill

den

den

den



## **5.b Building Description**

### **Construction and Systems**

The construction of this new senior residence will consist of concrete footings and CMU foundations, concrete slab-on-grade, 2x6 wood stud exterior walls and prefabricated open-web wood floor trusses and roof trusses. The exterior walls will be finished with a face brick that varies in height, and fiber cement siding above the brick. The roofing will be an EPDM membrane at the flat porch areas with architectural grade roof shingles on the pitched roofs. Aluminum sliding doors at the main entrance and energy-efficient, vinyl single-hung windows are specified. The exterior walls will contain R-19 batt insulation, with R-10 rigid insulation at the foundation/slab and R-38 insulation in the attic spaces, and the building envelope will be sealed per the Energy & Environmental Building Association's (EEBA) details to achieve a minimum HERS rating of 86 and meet Energy Star standards. The building will have Energy Star labeled residential appliances, light fixtures and equipment wherever possible, with low-flow plumbing fixtures to conserve water.

### **Project Amenities**

The new residence will contain approximately 56,530 GSF of area on four floors. There will be forty-five (45), one-bed/one-bath rental apartments, comprising of approximately 700 s.f. of living space and five (5), two-bed/one-bath rental apartments, comprising of approximately 950 s.f. of living space. Various common areas throughout the building create opportunities for social, wellness, and recreational activities. First floor amenities will include a large community room with kitchenette, lounge and retail space. Common laundry facilities will be on the second floor, a wellness center will occupy the third floor, and a library/computer lounge will be on the top floor. Two elevators service each floor, with a spacious Elevator Lobby/Lounge. Outdoor amenities include a generous patio and private yard that are directly accessible from the first floor lounge.

### **Apartments**

Each apartment will have full bedrooms, a living/dining room, full-size kitchen and bathroom, and ample closet space (coat, linen, hallway and bedroom). Two large windows will offer ventilation and natural light in each living and bedroom. The bedrooms are sized to accommodate resident furnishings, with adequate space for circulation and storage. The kitchens are designed with a top-mount refrigerator, self-cleaning electric range with front controls, vented range hood with wall switch, stainless steel sink with single lever faucet, dishwasher and a wide pass-through shelf that is open to the dining area. The bathrooms will have a full-size bathtub or shower, cultured marble lavatories with vanity base cabinets, medicine cabinets and



toilets. All units will be intentionally designed with special consideration for functionality and usability for senior residents. These include lower wall cabinets in the kitchens, wire pulls on all cabinet doors and drawers, full grab bars at all toilets and bathtubs/showers, higher toilets, and hand-held shower sprayers.

Electric service to each unit will be individually metered and controlled with wall-mounted thermostats with large, easy to read numbers. The heating and cooling system will employ electric heat pumps and individual gas water heaters. Appliances, HVAC equipment and light fixtures will be Energy Star labeled whenever possible. Each unit will have CAT5e wiring for telephone, data, and digital cable television service. All units will contain an emergency-call pull cord in the bedrooms and bathroom to “alert” the management if a resident is in need of assistance.

### **Accessibility and Visitability**

Five(5), (or 10% of the units), will be fully wheelchair accessible, and all remaining apartments will be handicap *adaptable* with many accessible features. In addition to the standard features listed above, all fully accessible-units will include a lowered work and sink counter with open knee-space in the kitchens, a full-size roll-in shower with portable shower seat, cultured marble wheelchair-accessible lavatory, and a wall-mounted skirt in the bathrooms. Two (2) apartments will be equipped with devices for hearing and visually impaired residents. All apartments and common areas in the new residence and the outdoor amenity spaces will be fully *Visitable* by friends, family and staff.

### **Energy Conservation & Green Building Criteria**

The Wynne Senior Residences project team, with its extensive experience in providing the highest industry standard, has implemented goals to achieve sustainable needs as well as urban design concepts without compromising the ability of future generations to meet their own needs. The green building measures that reduce energy needs that The Wynne Senior Residences will reference are as follows:

The overall U-value of the exterior building envelope will exceed the requirements of the 2009 International Energy Conservation Code for residential buildings (regardless of the number of stories) by at least 10%, as verified by a REScheck certificate. Air sealing of the exterior building envelope and attic plane shall be included. (Trade-offs available in the REScheck software for mechanical equipment will not be allowed.)

All appliances, mechanical equipment, windows, ceiling and exhaust fans, and exit signs, will be Energy Star® labeled when such equipment and appliances exist. (Exception: programmable thermostats do not need to be provided.) In addition, 100% of the permanent room light fixtures in the dwelling units will be equipped with compact fluorescent or LED bulbs and 100% of the

community room and common area corridor and stair lighting will be fluorescent with electronic ballasts or will utilize compact fluorescent or LED bulbs.

The development will meet Energy Star® Standards by achieving a Home Energy Rating System (HERS) index necessary to achieve an Energy Star® rating. This will include computing a HERS score based on a review of the drawings and specifications prior to construction; blower door testing, a thermal bypass checklist inspection during construction; and HVAC design in accordance with ACCA Manuals D, J, N, Q, and S. The referenced development will promote energy efficiency and conservation, operational savings and sustainable building practices by conforming to the “Threshold Green Building Criteria” which follows.

### **Green Building Criteria**

1. Water saving plumbing fixtures in compliance with the EPA WaterSense program shall be installed throughout the development with the following maximum flow rates: Showerheads: 2.0 gpm, Bathroom Faucets: 1.5 gpm, Toilets: 1.28 gpf. In addition, kitchen faucets shall be 2.0 gpm maximum.
2. Landscape plantings shall be drought-tolerant and will not need irrigation.
3. Provisions for a development wide recycling program shall be provided.
4. Photocells shall be provided to control all site lighting.
5. All paints, primers and clear finishes used shall be low volatile organic compound (VOC) type in accordance with Green Seal Standard GS-11 for interior paint, GC-03 for anti-corrosive paint, and South Coast Air Quality Management District (SCAQMD) Rule #1113 for clear wood finishes and stains.
6. All caulking, sealants and adhesives shall be low VOC type in accordance with SCAQMD Rule #1168.
7. Composite woods used indoors shall be free of urea formaldehyde or shall be sealed with a durable low VOC sealer that complies with SCAQMD Rule #1113. Cabinetry with KCMA Environmental Stewardship Program (ESP) certification shall be deemed to satisfy this requirement.
8. Carpets shall bear the Carpet and Rug Institute “Green Label” or shall be manufactured from at least 25% recycled materials. Bathroom fans shall be Energy Star® labeled and in accordance with ASHRAE 62.2. (For preservation developments, the installation of switch-mounted timers will satisfy these criteria.)
9. Bathroom and Kitchen fans and clothes dryers shall be vented directly to the outdoors.
10. Mechanical ventilation in accordance with ASHRAE 62.2 shall be provided.
11. Heating, ventilation and air-conditioning systems shall be engineered and properly sized for the space covered in accordance with ACCA Manuals J and N, as applicable. A mechanical engineer will certify to the design by sealing the construction documents.
12. No piping shall be located outside of the interior finish of the insulated building envelope. All domestic water pipes except for PEX piping shall be insulated.

13. No mold-propagating materials shall be used in damp areas. Only moisture resistant materials shall be used in bathrooms and at tub-shower surrounds.
14. Vapor barriers shall be provided for all interior slabs on grade.
15. All below grade spaces shall be waterproofed and have foundation drainage.
16. Passive radon mitigation systems shall be installed in areas designated as EPA Radon Zone 1 and 2. The lowest level containing dwelling units or community space must be tested for radon in all buildings prior to occupancy. Test results above the action level will require that an active radon mitigation system be installed that result in satisfactory test results.
17. Grading at perimeter of the building shall provide positive drainage away from the building.
18. Units with garages shall have a carbon monoxide sensor controlled exhaust fan and the demising wall between the garage and living space shall be a continuous air barrier.
19. Termite shields or borate based wood treatment shall be provided with low VOC caulking at all floor joints and penetrations to prevent insect infestation. Chemical soil treatment or bait stations shall not be used.
20. Lead safe work practices shall be used in all properties built before 1978.
21. The Owner shall be provided with a maintenance & operations manual and training including all materials, systems and equipment used in the construction, explaining the Green Building components and amenities, how they benefit the property, and how to properly maintain them.
22. A Green Building Guide and orientation shall be provided to the residents explaining the Green Building components and amenities and how they benefit from them.



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54TH STREET

ALLEY

LINE OF BUILDING ABOVE

11 PARKING SPACES

MAIN ENTRY

PROPOSED 4-STORY SENIOR RESIDENCE  
(50 UNITS)

EXISTING HOUSE

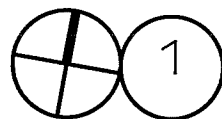
EXISTING GAS LINE

PATIO

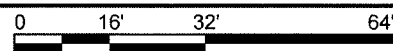
PROPERTY LINE  
FENCE LINE

ARLINGTON STREET

UTILITY LEGEND	
—SS—	SANITARY SEWER
—W—	WATER
—E—	ELECTRIC
—G—	GAS



SITE PLAN



23,940 S.F. / 0.5496 AC.



**Kitchen & Associates**  
Architecture  
Engineering  
Planning  
Interiors

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Tel: 856.854.1880

Philadelphia, PA  
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1628 John F Kennedy Blvd - 19103  
Suite 1600  
Tel: 215.985.0111

On the Web  
www.kitchenandassociates.com

Date:	11/06/14
Job #:	12134
Drawn:	-
Mngr:	RR
Revision	Date
12134_WynTh_Comp.pln	

Wynne Senior Residence

54th & Arlington Streets  
Philadelphia, PA 19131

**PENNROSE**  
Properties, L.L.C.

1

SITE PLAN

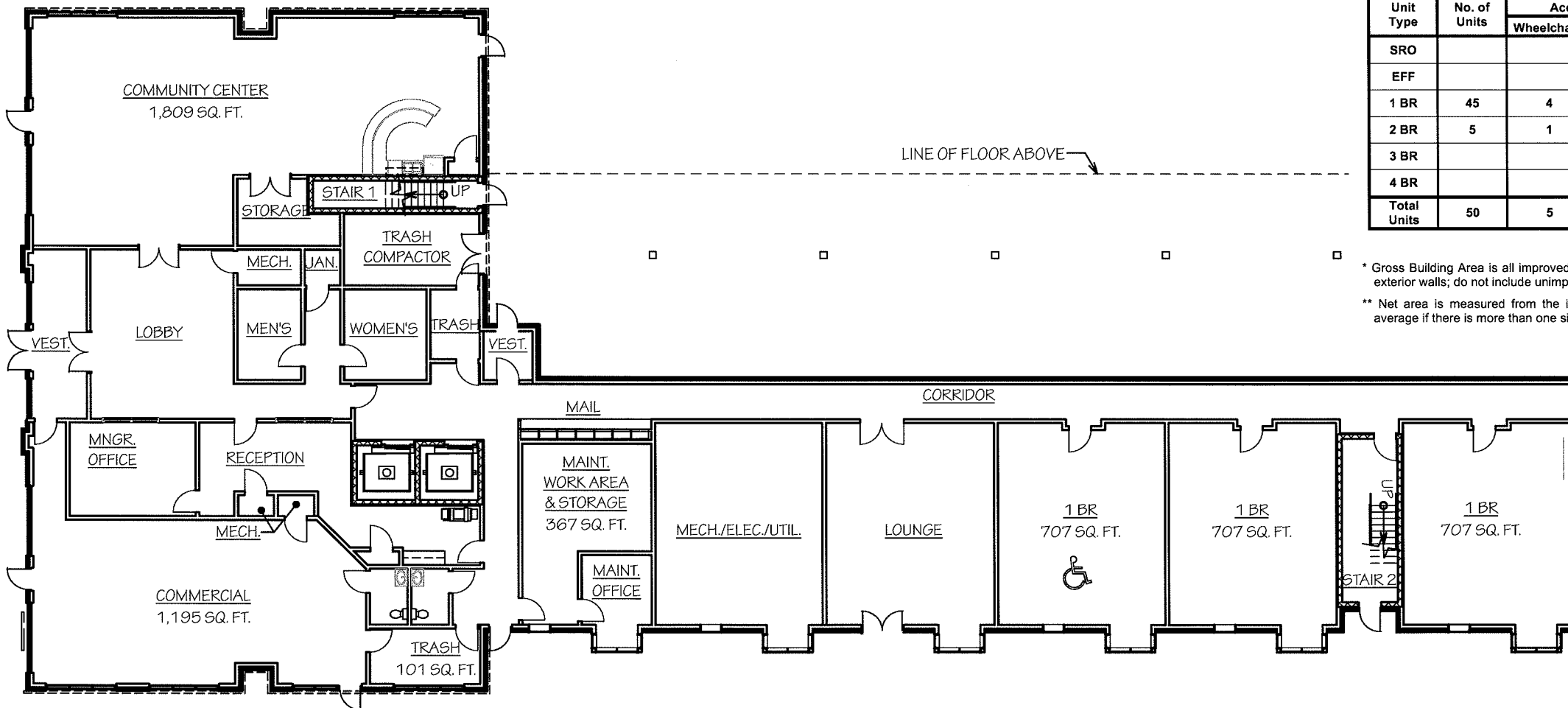
**SECTION 2.02.D**  
**DEVELOPMENT TABULAR SCHEDULE**  
*(To be completed by the Architect)*

Development Name: Wynne Senior Residence  
 PHFA No. TBD Date 11/06/14

- Number of Buildings: 1
- Building Height (Stories): 4 Stories
- Building Code: X IBC     IRC Construction Type: 5A
- Structural System: Wood Frame Walls, Floor Trusses and Roof Trusses
- Exterior Finish: Brick and Cement Board Siding, EPDM Roofing
- Gross Building Area\*: 56,530 GSF
- Gross Commercial Area: 1200 SF 2 % of Gross Bldg. Area
- Number of On-Site Parking Spaces: 11
- Required Variances: TBD
- Applicable Accessibility Regulations:  
 Sec. 504 X UFAS X PA UCC X FHAA X ADA X

Unit Type	No. of Units	Accessible Units		Adaptable Units		Net Square Footage**
		Wheelchair	Hearing/Vision	Wheelchair	Hearing/Vision	
SRO						
EFF						
1 BR	45	4	1	41	-	688
2 BR	5	1	1	4	-	948
3 BR						
4 BR						
Total Units	50	5	2	45	-	

\* Gross Building Area is all improved areas including commercial space measured from the outside of the exterior walls; do not include unimproved basements or abandoned, unused space.  
 \*\* Net area is measured from the interior face of the unit separation and/or exterior walls. Show the average if there is more than one size in each type.



**1 1ST FLOOR PLAN**  
 0 10' 20' 40' 12,272 G.S.F.

**DRAWING LEGEND**

ACCESSIBLE UNIT

HEARING/VISION IMPAIRED UNIT



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Date:	10/29/13
Job #:	12134
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Revision	Date

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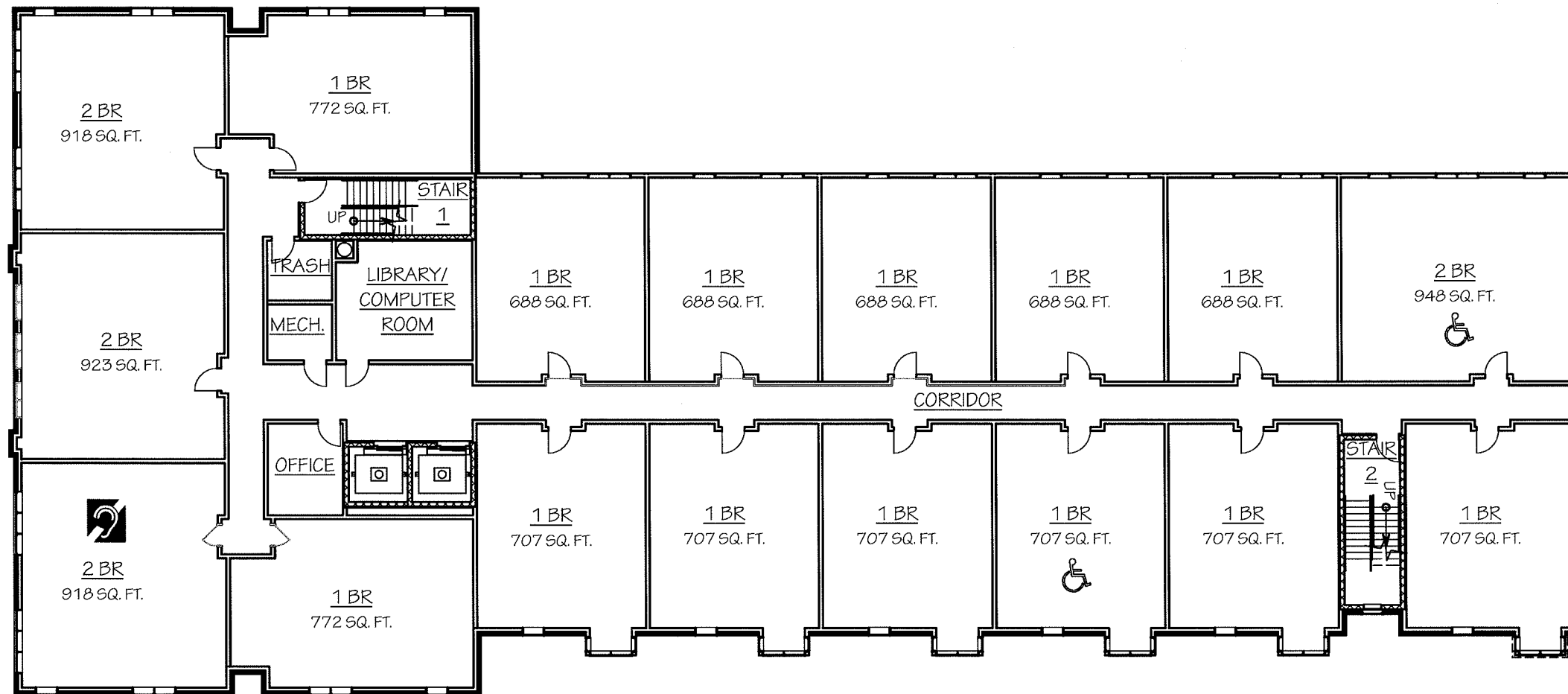
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 PROPERTIES, L.L.C.

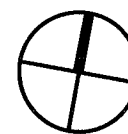
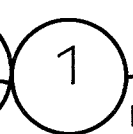
Wynne Senior Residence  
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 Philadelphia, PA 19131



**2**  
 FIRST FLOOR PLAN

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**2ND FLOOR PLAN**  
 0 10' 20' 40' 16,734 G.S.F.

DRAWING LEGEND	
	ACCESSIBLE UNIT
	HEARING/VISION IMPAIRED UNIT



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Collingswood, NJ  
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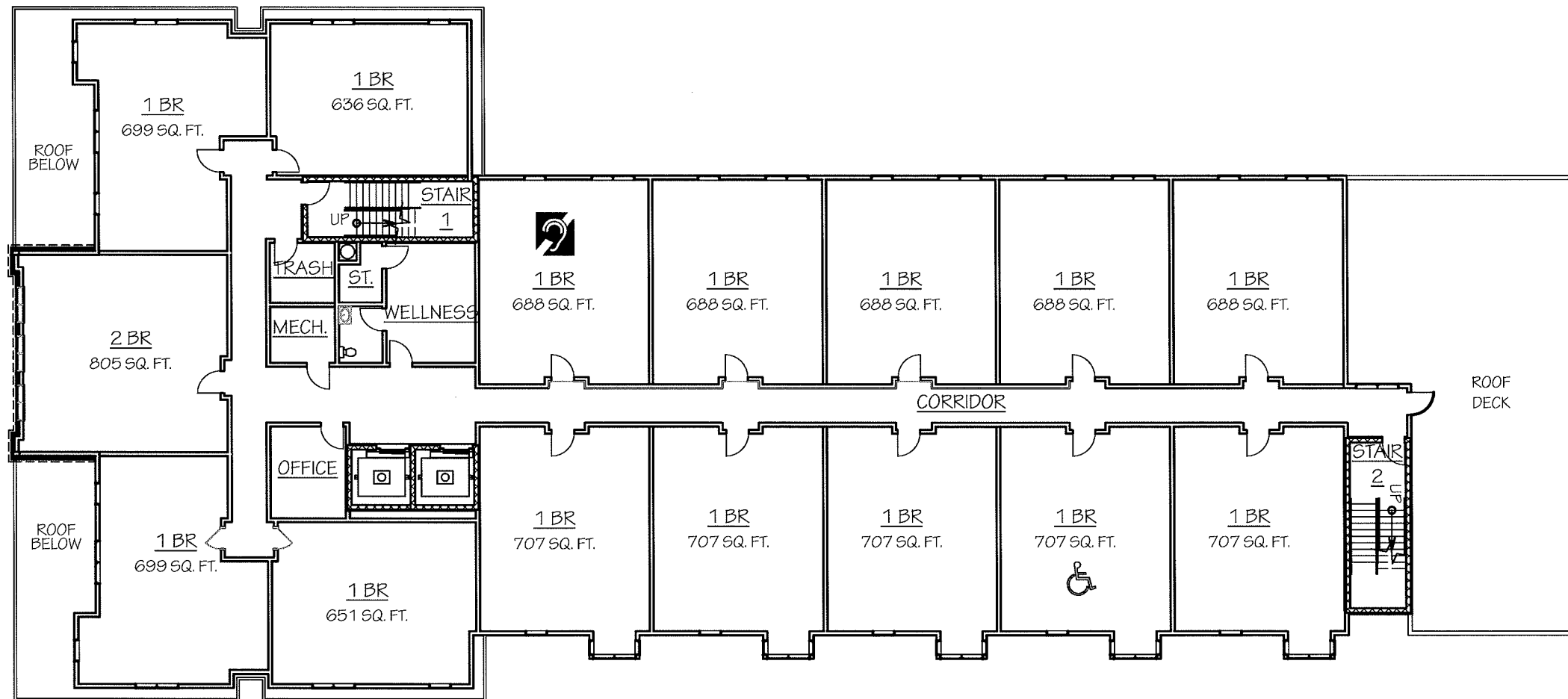
Wynne Senior Residence

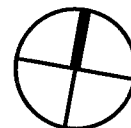
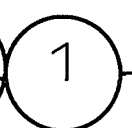
54th & Arlington Streets  
 Philadelphia, PA 19131



**PENNROSE**  
 Properties, L.L.C.

3  
 SECOND FLOOR  
 PLAN

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**3RD FLOOR PLAN**  
 0 10' 20' 40' 13,866 G.S.F.

DRAWING LEGEND	
	ACCESSIBLE UNIT
	HEARING/VISION IMPAIRED UNIT



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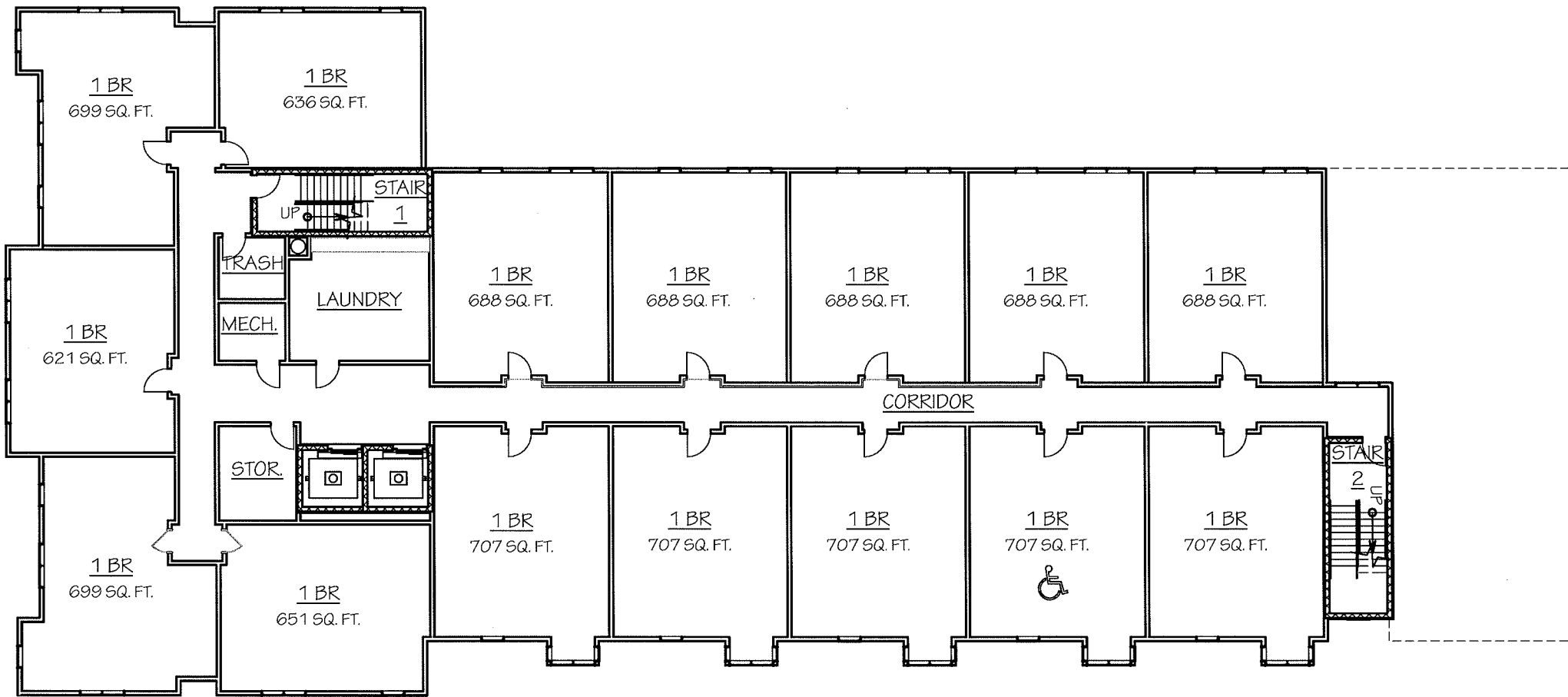
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Job #:	12134
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Mngr:	RR
Revision	Date

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**PENNROSE**  
 Properties, LLC



Wynne Senior Residence  
 54th & Arlington Streets  
 Philadelphia, PA 19131

4  
 THIRD FLOOR PLAN

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**4TH FLOOR PLAN**  
 0 10' 20' 40' 13,658 G.S.F.

DRAWING LEGEND	
	ACCESSIBLE UNIT
	HEARING/VISION IMPAIRED UNIT



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 Architecture  
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 Planning  
 Interiors

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 736 Madison Avenue - 08108  
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 Philadelphia, PA  
 8 Penn Center  
 1628 John F Kennedy Blvd - 19103  
 Suite 1600  
 Tel: 215.985.0111  
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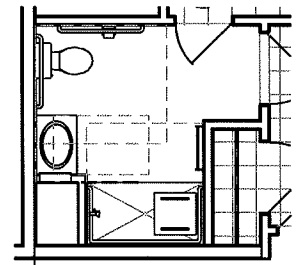
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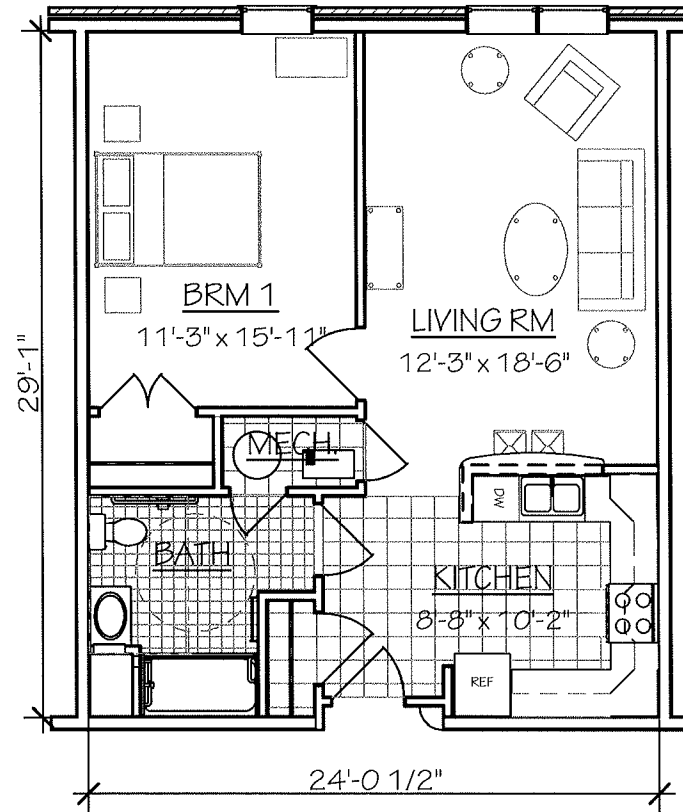
Wynne Senior Residence  
 54th & Arlington Streets  
 Philadelphia, PA 19131  
**PENNROSE**  
 Properties, L.L.C.

5  
 FOURTH FLOOR

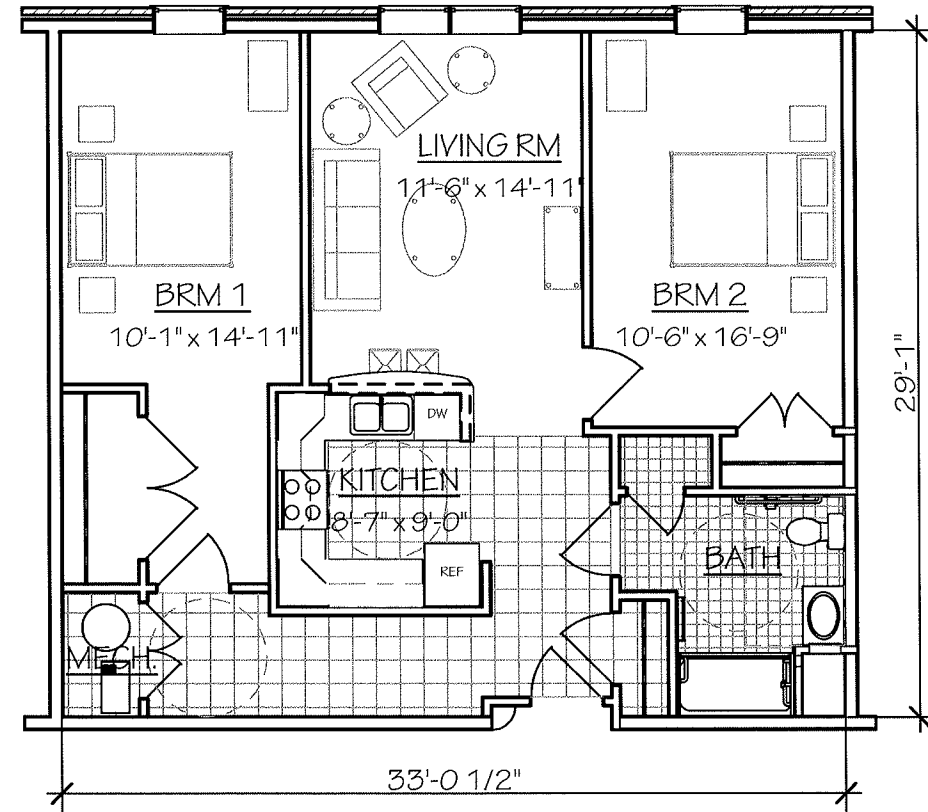
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**ACCESSIBLE BATH**



**1** **TYPICAL ONE BEDROOM UNIT**  
 Scale: 0 5' 10' 20'  
 GSF: 688  
 NSF: 658



**2** **TYPICAL TWO BEDROOM UNIT**  
 Scale: 0 5' 10' 20'  
 GSF: 949  
 NSF: 896



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 Planning  
 Interiors

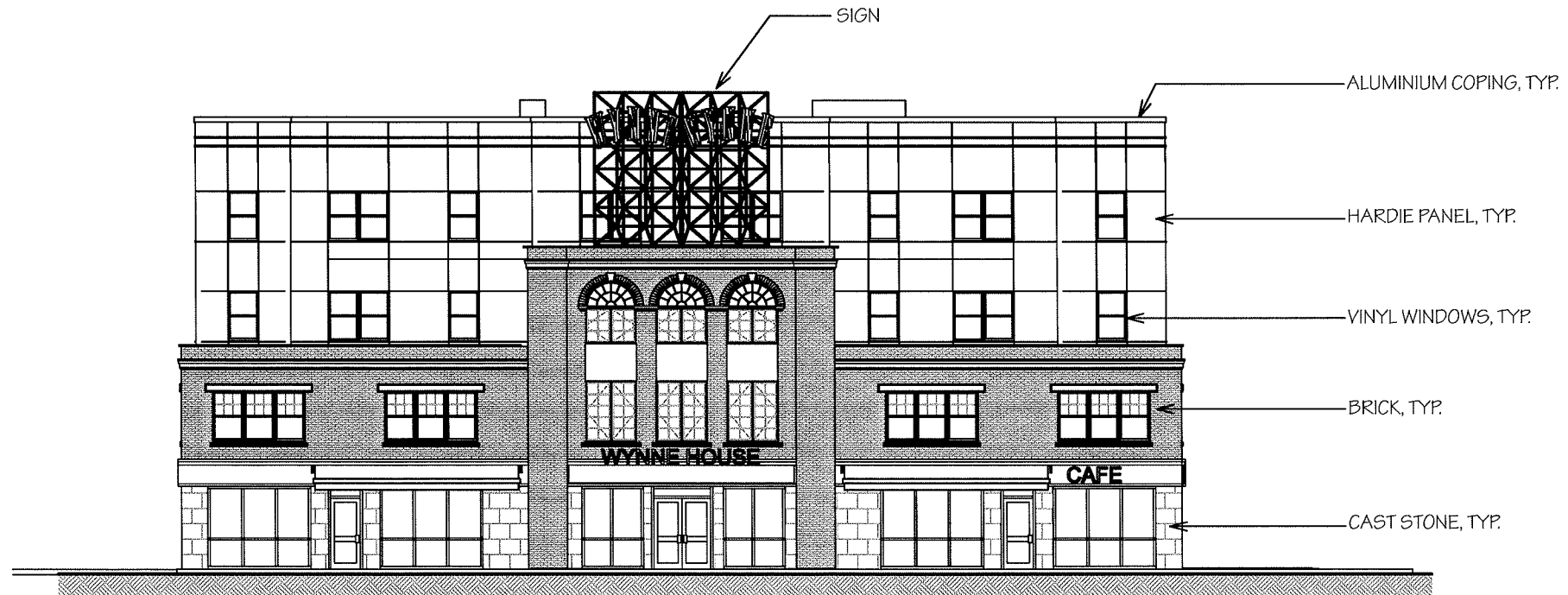
Collingswood, NJ  
 756 Haddon Avenue - 08108  
 Tel: 856.854.1880  
 Philadelphia, PA  
 8 Penn Center  
 1628 John F Kennedy Blvd - 19103  
 Suite 1602  
 Tel: 215.985.0111  
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Date:	10/29/13
Job #:	12134
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Mngr:	RR
Revision	Date
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**PENNROSE**  
 Properties, L.L.C.

**6**  
 TYPICAL UNIT  
 PLANS

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1 54TH ST. ELEVATION



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 Engineering  
 Planning  
 Interiors

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 756 Madison Avenue - 08108  
 Tel: 856.854.1880  
 Philadelphia, PA  
 8 Penn Center  
 1628 John F. Kennedy Blvd - 19103  
 Suite 1600  
 Tel: 215.985.0111  
 On the Web  
 www.kitchenandassociates.com

Date:	10/29/13
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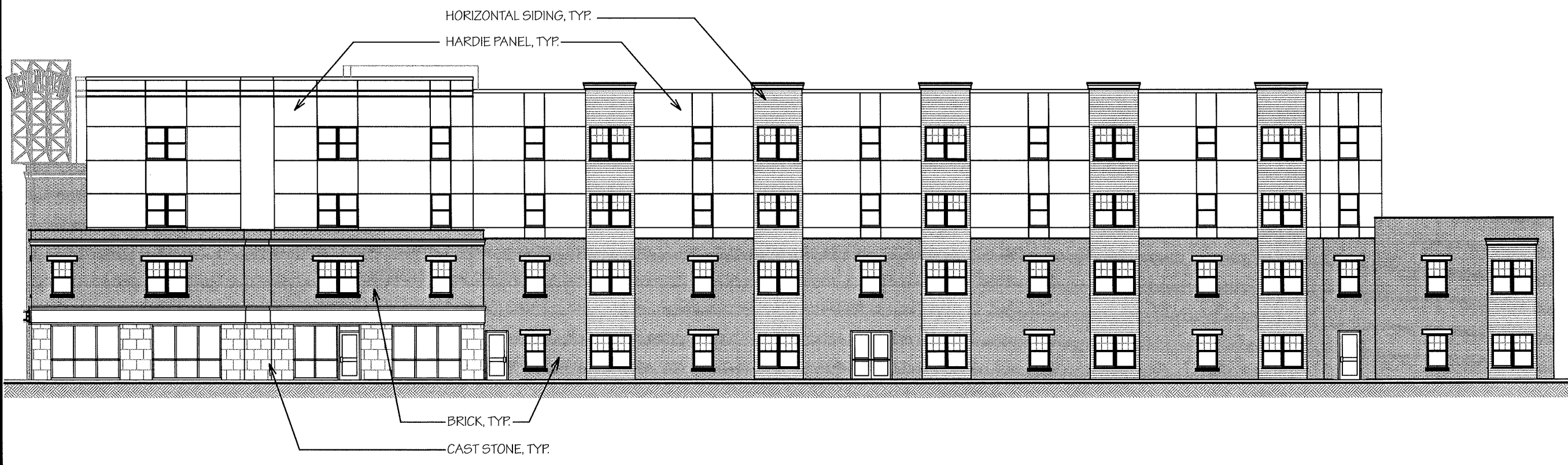
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Wynne Senior Residence  
 54th & Arlington Streets  
 Philadelphia, PA 19131

**PENNROSE**  
 PROPERTIES, L.L.C.

7  
 54TH ST.  
 ELEVATION

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1 ARLINGTON ST. ELEVATION



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 Engineering  
 Planning  
 Interiors

Collingswood, NJ  
 756 Haddon Avenue - 08108  
 Tel: 856.834.1800

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 8 Penn Center  
 1628 John F Kennedy Blvd - 19103  
 Suite 1600  
 Tel: 215.985.0111

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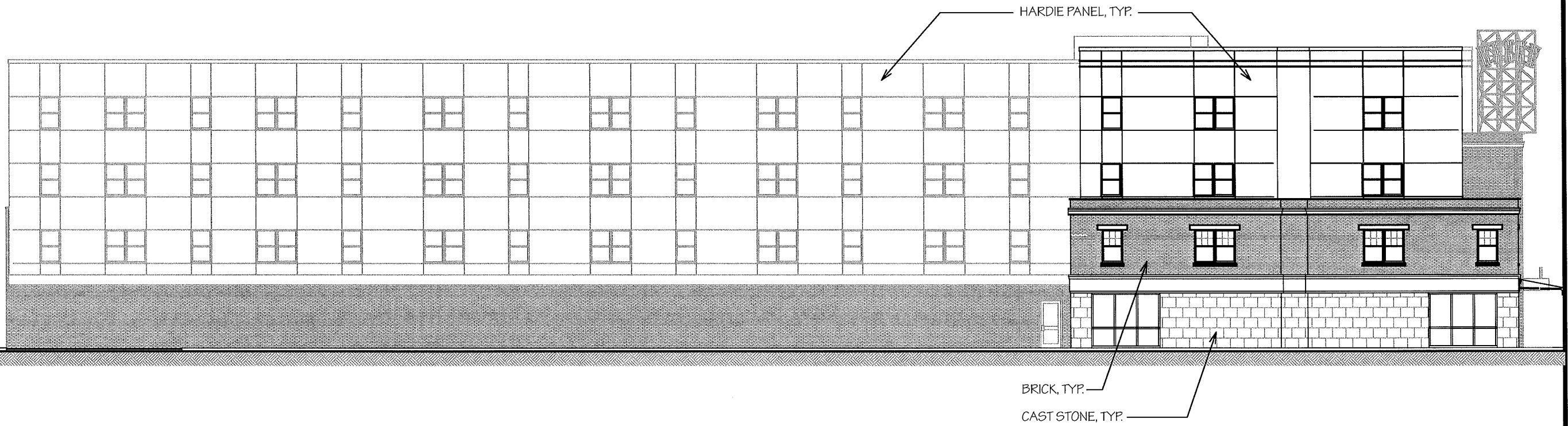
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 Philadelphia, PA 19131

**PENNROSE**  
 PROPERTIES, L.L.C.

8  
 ARLINGTON ST.  
 ELEVATION



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1 ALLEY ELEVATION

0 8' 16' 32'



**Kitchen & Associates**  
 Architecture  
 Engineering  
 Planning  
 Interiors

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 756 Haddon Avenue - 08108  
 Tel: 856.654.1800

Philadelphia, PA  
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 1628 John F. Kennedy Blvd - 19103  
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 Tel: 215.985.0111

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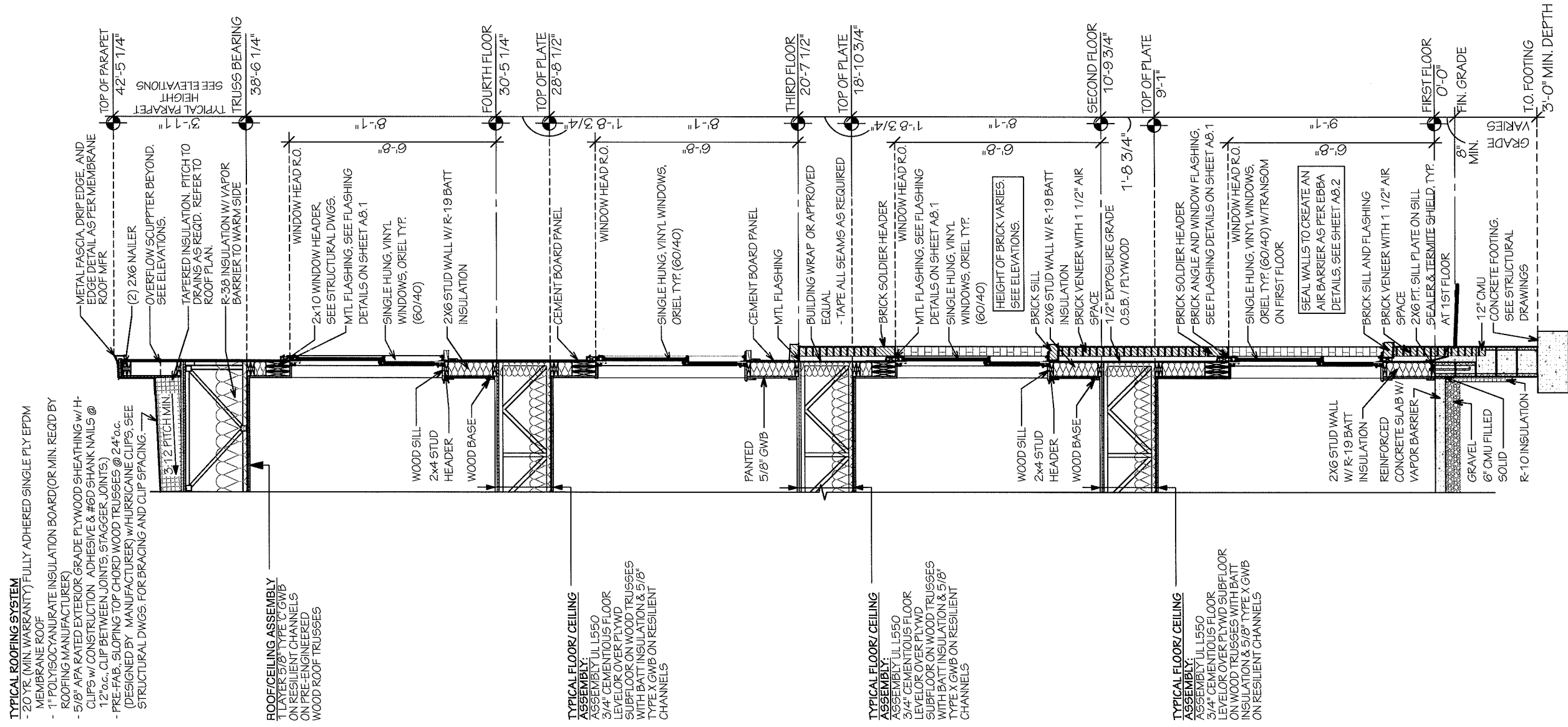
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Revision	Date

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Wynne Senior Residence  
 54th & Arlington Streets  
 Philadelphia, PA 19131

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 Properties, L.L.C.

9  
 ALLEY  
 ELEVATION



1 TYPICAL EXTERIOR WALL SECTION



Wynne Senior Residence  
54th & Arlington Streets  
Philadelphia, PA 19131

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P R O P E R T I E S . L L C

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Revision	Date

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Tel: 856.854.1000

Philadelphia, PA  
8 Penn Center  
1628 John F Kennedy Blvd - 19103  
Suite 1602  
Tel: 215.985.0111

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Job #:	12134
Drawn:	-
Mngr:	RR
Revision	Date

12134\_WynnTh\_Comp.pln

Wynne Senior Residence

54th & Arlington Streets  
Philadelphia, PA 19131

**PENNR**  
PROPERTIES, L.L.C.

11

BUILDING  
PERSPECTIVE



**Not Applicable**

**Not Applicable**

Tab 6. Project Amenities/Services

Included in the section is:

- List of Project amenities

## **Tab 6**

### **Project Amenities**

The new residence will contain approximately of area on four floors. There will be forty-five (45), one-bed/one-bath rental apartments, comprising approximately 750 s.f. of living space and five (5), two-bed/one-bath rental apartments, comprising approximately 950 s.f. of living space. Various common areas throughout the building create opportunities for social, wellness, and recreational activities. First floor amenities will include the Following:

- Large community room with television and cable
- kitchenette
- Lounge Area
- On site management and maintenance office including space for social services coordinator
- On-site parking
- Bike racks
- Retail space with outdoor seating

The Second Floor will include:

- Common laundry facilities with and adequate amount of washers and Dryers

The Third Floor will include:

- Wellness center intended to provide an array of medical and educational services to the resident population

The Fourth Floor will include

- library/computer lounge with internet access

Two elevators service each floor, with a spacious Elevator Lobby/Lounge. Outdoor amenities include a generous patio and private yard that are directly accessible from the first floor lounge.

## Tab 7. Developer Capacity and Qualifications

Included in the section is:

- Owner Entity Structure & org Chart
- Team Structure statement
- Principal and Developer Profiles



## **Wynne Senior Residences Organizational Structure Narrative**

Wynne Senior Residences, LP is the Development entity created for the purposes of developing the Wynne Senior Residences Project.

Pennrose GP, LLC will be the general partner owning .05% of the partnership.

Wynnefield-Overbrook Revitalization Corp is the non-profit partner in the organization. WORC will be the Class B Member owning .05% of the partnership. WORC may create a development entity for the purposes of developing this project when appropriate.

Pennrose LP, LLC will be the initial limited partner owning a 99.00% interest, until the tax credit investor is admitted at closing (when it will take the 99.00% interest).

Pennrose Development, LLC will be the developer earning the developer fee.

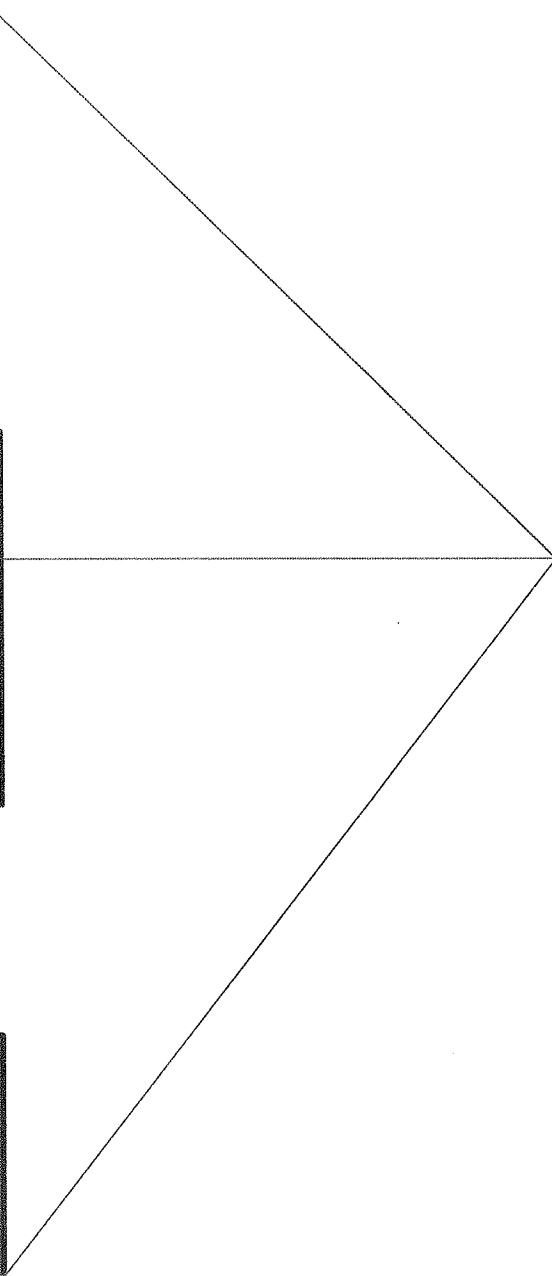
Wynne Senior Residences LP  
A Pennsylvania Limited Partnership  
Tax ID # 46-3605700

Developer  
Pennrose Development LLC  
A Pennsylvania Limited  
Liability Company  
Tax ID # 65-1211566

General Partner  
Pennrose GP, LLC a  
Pennsylvania Limited  
Liability Company  
Tax ID # 65-1211568  
Ownership % = .05%

Investor Limited Partner  
Tax credit Investor  
TBD  
Ownership % = 99.00

Class B Member  
Wynnefield-Overbrook  
Revitalization Corporation  
Ownership % = .05%



## **Tab 7 b Team Structure Statement**

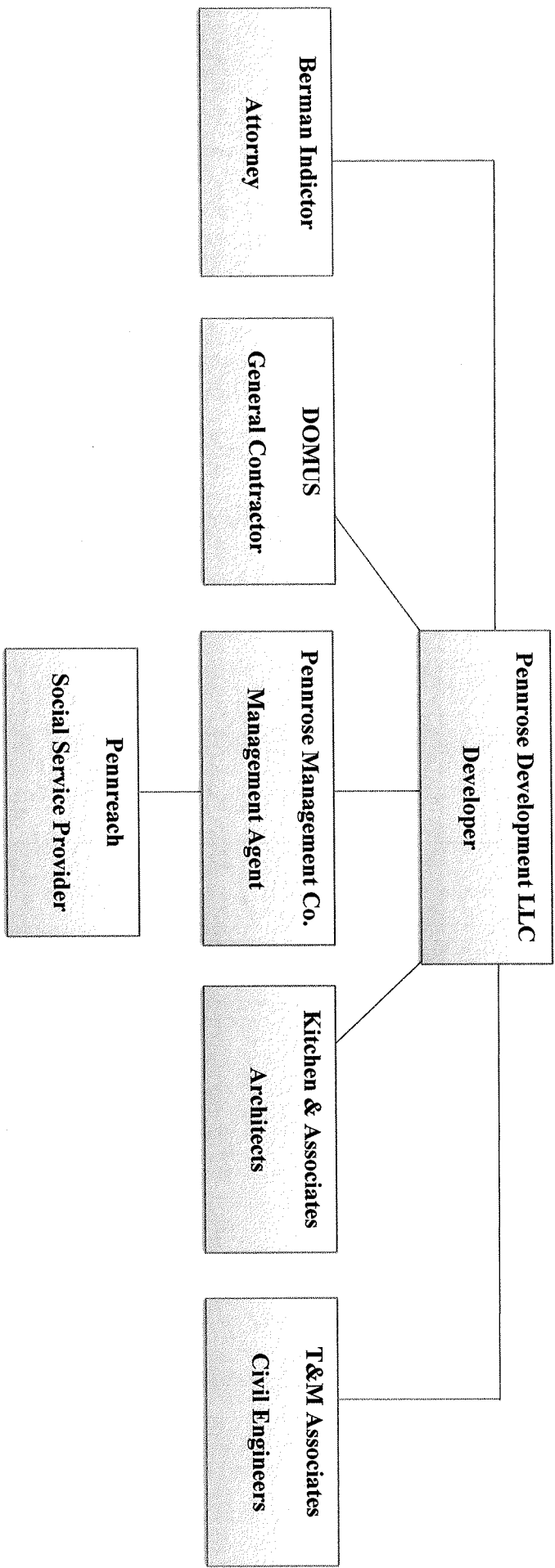
The Development team will be led by Penrose Development LLC (PDLLC) and will serve the role as the project developer. PDLLC will manage the design team, Kitchen & Associates and T&M engineering, while working to create a safe energy efficient facility. In addition, PDLLC will manage the general contractor, Domus Inc, to ensure that quality construction is the benchmark while keeping costs within the construction budget. In addition the developer will monitor the GC for compliance with Section 3 and MBE/WBE requirements.

The developer will work closely with counsel, Berman, Indictor, to execute all legal documentation and coordinate financial closing with other partners such as PHA, lenders, investors and other agencies within the City of Philadelphia.

Upon completion of construction, the Penrose Management Company (PMC) will assume the responsibility of management of the facility. The Developer will work closely with PMC to aid in effective design and familiarize the management staff with the operating systems of building. The building will be staffed with a full complement of on-site management, maintenance and social services staff.

The social services are expected to be administered by Pennreach, a quality social service provider that works with Penrose on the majority of its properties. Pennreach will work closely with the PMC staff to ensure that residents receive adequate services consistent with the social services plan for this specific project.

# Wynne Senior



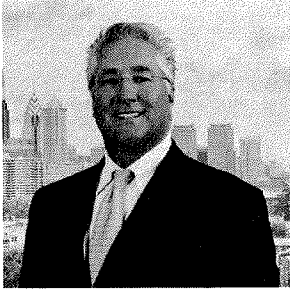


**RICHARD K. BARNHART**  
***Chairman and Chief Executive Officer***

Richard K. Barnhart began his career at Pennrose in 1985, as co-owner and president of its development company – Pennrose Properties. On the retirement of its Founder and Chairman, John B. Rosenthal, in 2004, Mr. Barnhart assumed the role of Chairman and Chief Executive Officer. He provides developmental oversight and leadership to both the Pennrose team of developers and the over 400 Pennrose employees.

Mr. Barnhart's planning, development, financial management and implementation expertise provide solid direction and guidance for successful completion of each real estate development Pennrose undertakes. He is adept with projects involving intricate public-private partnerships. Under his leadership, Pennrose has succeeded with large, award-winning mixed-use developments. From an historic rehabilitation perspective, Pennrose has completed more than 30 developments fully complying with National Park Service standards and has renovated more structures using a combination of low income housing tax credits and historic rehabilitation tax credits than any other developer in the country. Barnhart has initiated and fostered numerous ongoing relationships with nonprofits, and he actively seeks ways to involve community members in the development process.

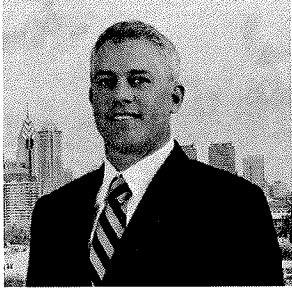
Mr. Barnhart holds a Bachelor of Science degree in Real Estate and Insurance from Pennsylvania State University..

**MARK H. DAMBLY*****President***

Mark H. Dambly began his career at Pennrose Properties in 1992 as a Vice President and partner. He became President of the firm in 2004. His vast experience in a variety of real-estate development arenas includes complex multi-funded transactions in both the affordable and market-rate housing markets. He is fully invested in leading the firm's development teams through every phase of the development process, from initial financing applications and approvals through closings and construction completion. Mr. Dambly directs the firm's business development efforts, seeking opportunities for future business and establishing and maintaining relationships with municipalities, agencies, and lenders. Under his leadership, Pennrose's portfolio of real-estate developments has grown to more than 12,000 units.

With his many years of experience working in the complex context of today's real-estate development environment, Mr. Dambly understands the intricacies of residential development and takes a balanced perspective of social necessity and market opportunity. He applies his experience to form sophisticated solutions to the inherent difficulties of creating quality affordable housing in today's market. He coordinates creative developmental financing across a broad range of sources including: low-income housing tax credits, historic tax credits, tax-exempt bonds, general obligation bonds, and HUD Section 8 Project Based Assistance and HOPE VI grants. He brings a proven financial capability, a record of accomplishment of successful properties planned and built on schedule, and a strong commitment to providing families and seniors with affordable, multifamily and market-rate housing.

Mr. Dambly is a graduate of Pennsylvania State University, where he earned a Bachelor of Science degree in Real Estate and Insurance.



**TIMOTHY I. HENKEL**  
***Senior Vice President***

In July 1999, Timothy I. Henkel began at Pennrose as a development officer, participating in all phases of the development of market-rate and affordable rental and for-sale housing from project inception through completion. In 2004, he was promoted to Vice President with responsibilities for coordinating all aspects of the development process, including property acquisition, development financing, and land development approvals. Mr. Henkel became a Pennrose partner and Senior Vice President in 2009.

Mr. Henkel is an expert in all forms of public and private real estate financing and has executed the full array of Pennrose's diverse portfolio of transactions including affordable housing via low income housing tax credits (LIHTC), historic rehabilitation tax credits (HTC), mixed-income multifamily housing via tax-exempt bonds, and public housing replacement leveraging federal HOPE VI grants.

Mr. Henkel holds a Bachelor of Science degree in Civil Engineering from Bucknell University and a Master of Business Administration from the William E. Simon School of Business Administration at the University of Rochester.

# PENNROSE



**Harry Moody**  
Development Officer  
Pennrose Properties, LLC

Harry Moody joined Pennrose Properties LLC in 2011. As a member of the real estate development team, he is responsible for all phases of the development process, from concept to completion. He has experience structuring complex real estate transactions, particularly those that combine tax credits with state, local, and private financing sources. He has expertise in working with Housing Authorities, public and private sector, and 501(c) (3) non-profit partners including Community Development Groups. While at Pennrose, Mr. Moody has led the development team to close on financing and complete construction on several phases of a mixed-finance HOPE VI development in northern New Jersey which includes a combination of rental units, homeownership units and infrastructure which total approximately \$85,000,000 in investment in the northern New Jersey community. Mr. Moody continues to work on completing an Early Childhood Education Center which is the last phase of the HOPE VI Development.

Prior to starting at Pennrose, Mr. Moody worked for several years as a Developer for large affordable housing development company working on complex mixed financed projects with Housing Authorities as well as several phases of homeownership in the North Philadelphia. In addition to his experience in the Affordable Housing Development industry, Mr. Moody has extensive experience in the Property management field having worked for one of the largest affordable housing management firms in the country for over 14yrs. As well, Mr. Moody spent 13 years in the non-profit industry serving as Director of Property Management and Executive Director for a large Community Development Corporation and a Community Development funding collaborative in the Philadelphia area.

Mr. Moody holds a BA from Millersville University with a concentration in management.



Tab 8. Prior Affordable Housing Experience

Included in the section is:

- Summaries for 3 projects completed by Pennrose in the last 5 years. which include public housing units

# RUSH CROSSING

The Trenton Housing Authority ("THA") has selected Pennrose Properties, LLC ("Pennrose") to undertake the revitalization of the former Carl Miller Homes Public Housing Project. The 9.15-acre Carl Miller Homes site formerly consisted of 256-units in two high-rise and twelve low-rise structures. The site was built at a far higher density than the surrounding neighborhood. Today, the site is vacant, with relocation of all former residents having been completed by the Housing Authority.

The overall revitalization plan calls for the demolition and replacement of the Carl Miller Homes development with two hundred eight (204) units of mixed-income, affordable family rental housing. The newly revitalized community will be called Rush Crossing. Seventy-three (73) replacement public housing units will be sited throughout the development to create a true mixed-income community. The demolition of the existing two (2) high-rise buildings, ten (10) low-rise buildings and an open-air pavilion was completed in December, 2011.

Once completed, Rush Crossing will consist of sixty-three (63) one-bedroom, seventy-three (73) two-bedroom, sixty-two (62) three-bedroom, and six (6) four-bedroom units. One-hundred eighty-two (182) units will be constructed on the existing Carl Miller Homes site, while an additional twenty-two (22) will be constructed on 1.04 acres across Monmouth Street at the south end of the site. There will be a total of thirteen (13) buildings housing the 204 units. On-site parking (229 spaces) will be provided for the residents. The development also includes 5,400 square feet of community, management and maintenance space.

All buildings will pursue LEED for Homes certification. Reconfigured networks of streets, infrastructure and other public improvements will be designed to seamlessly connect the site into the surrounding communities. A recreational walkway along the adjacent Assunpink Creek will be created during the redevelopment and will become part of Trenton's Assunpink Greenway project.



completion	2014
location	100 Rider Avenue Trenton, NJ 08609
size	10.19 acres
occupancy	204-unit, mixed-income, family
developer	Pennrose Properties, LLC
architect	Kitchen & Associates
general contractor	AJD Construction
client	Trenton Housing Authority
investment	\$59 million
financing	4% Low-Income Housing Tax Credit equity, New Jersey Urban Transit Hub Tax Credit equity, a small permanent loan, and soft sources which include Trenton Housing Authority HOPE VI and Capital funds, Federal Home Loan Bank Affordable Housing Program Funds, and City of Trenton HOME and Regional Contribu-

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# ORCHARD RIDGE

Orchard Ridge is a 464-unit vibrant, new master-planned community built on the sites of the former Freedom Village Apartments and the Claremont Homes public housing complex in northeast Baltimore, MD. Located between Sinclair Lane and Erdman Avenue, the combined 59 acre site formerly contained 752 rental units, including 600 family garden apartments and a 152 unit, nine-story high-rise building that were demolished to make way for a revitalized, mixed-income neighborhood.

Pennrose, working closely with the community and the Housing Authority of Baltimore City, led the community-driven master planning process and continues to lead the redevelopment through multiple phases. To date, three rental phases and one homeownership phase have been completed. The fourth rental phase of the Orchard Ridge community will be completed this fall, and will provide 64-units of affordable rental housing in the form of townhouses, flats, and stacked units.

Once complete, the Orchard Ridge development will contain 172 rental townhomes, 189 homeowner townhomes and a 77-unit apartment building. Additionally, resident amenities include a number of park and playground areas and a 5,000 SF Community Building with fitness center, onsite management offices and program space for an active Residents' council.

Orchard Ridge involved an on-going partnership with the Housing Authority of Baltimore City and other City and State agencies. Pennrose and its team worked closely with the Orchard Ridge Tenant Council (ORTC), who represented former public housing residents, convening monthly meetings and soliciting direct input on the plan, design, scheduling, construction, and management. Through an MOU with ORTC, Pennrose established the accountability of its neighborhood partner, clearly identified roles and expected outcomes, and secured meaningful commitments from the Council to assist with resident programs and activities, after school and summer camp opportunities, and a Neighborhood Watch program. With playgrounds, walking paths and playing fields, the transformed Orchard Ridge neighborhood is a mix of rental and for-sale apartments and townhomes blended into a revitalized neighborhood fabric.

A total investment of over \$120 Million, the Orchard Ridge neighborhood underscores the importance of partnership and coordination in the most complex of endeavors. Pennrose continues to own, manage, and maintain all rental homes in the neighborhood, and is closely involved in the neighborhood's Homeowners' Association. The community is Green Communities and Energy Star Certified/Compliant and offers access to supportive services.



completion	2014
location	4300 Orchard Ridge Blvd Baltimore, MD 21213
size	60 acres
occupancy	464-unit s ; 172 rental townhomes, 189 homeowner townhomes and a 77-unit apartment building
developer	Pennrose Properties, LLC
architect	Wallace Roberts & Todd, LLC
general contractor	Harkins Builders, Inc. & C.L. McCoy Framing, Inc.
client	Housing Authority of Baltimore City
investment	\$105.6 million
financing	Md State Rental Housing Work Funds Baltimore City HOME Funds Md State 4% Tax-Exempt Bonds

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# C.WILLIAMS BROOKS

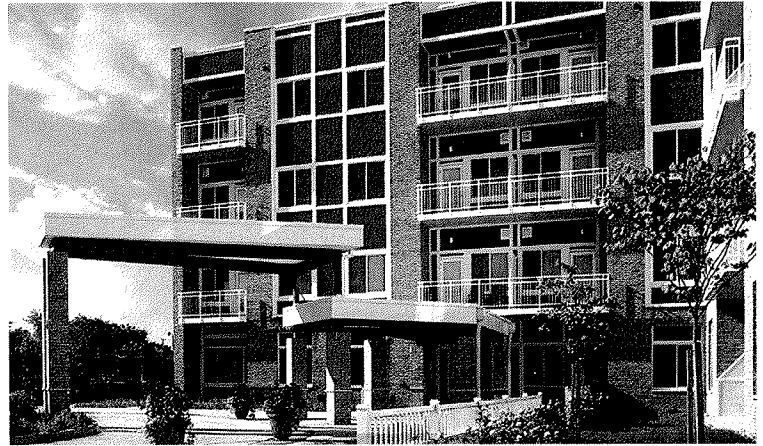
When the city of Hagerstown realized they needed to respond to the significant housing needs for their growing senior population they wanted to make sure they would simultaneously solve some of the other problems the city was facing. Hagerstown had a plethora of aging public housing stock and a shortage of public park space for residents to enjoy. Recognizing the potential in a large vacant site, the Hagerstown Housing Authority saw the opportunity to remedy many of the city's issues with one new, creative development. Before they could proceed, they needed a developer who would help them find the appropriate financing for their ambitious project to be realized.

The Hagerstown Housing Authority chose Penrose to develop the 60-unit, 4-story midrise complex. The \$14.4 Million project was built utilizing an array of funding sources; most notably the project received a \$9.8 Million dollar competitive HUD grant from the American Recovery and Reinvestment Act (ARRA), which was one of only two projects to receive this competitive financing in the state of Maryland.

Designed exclusively for the elderly, all units at C. Williams Brooks have one bedroom and one bathroom and are fully accessible for individuals with physical disabilities. Each unit is energy efficient featuring Energy Star appliances, occupancy censored lighting, and "healthy flooring". The building features an attractive entry vestibule, a convenience store and barber / beauty area, multiple common areas, management and supportive service offices, sufficient parking and adjacent green space with walking paths.

In December 2011 the C. Williams Brooks development won the Excellence in Green Building award for New Construction from the U.S. Green Building Council, Maryland Chapter. The development has also received National Awards of Excellence and Merit from NAHRO.

C. Williams Brooks is a phenomenal example of the successful intersection of energy efficient design, high-quality affordable senior housing, and public / private partnership in spurring economic growth.



completion	2011
location	45 West Baltimore Street
size	4.17 acres, 58,000 sq. ft., 4 story mid-rise
occupancy	60-unit, affordable, senior
developer	Penrose Properties, LLC
architect	Wallace Roberts & Todd, LLC
general contractor	Southway Builders Inc.
client	Hagerstown Housing Authority
investment	\$14.4 million
financing	ARRA Capital Funds Recovery Grant HUD Capital Fund Program HUD RHF Grant; MD DHCD 4% LIHTC MD MEEHA Grant HHA Program Income Contribution Columbia Bank Loan

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## Tab 9. Property Management Plan

Included in the section is:

- A Property Management Plan draft that reflect answers to the questions posed in the RFP. A full management plan will be negotiated with partners prior to closing. Given the Voluminous nature of the document, we elected to provide the pertinent information as it relates to responses to requirements in the RFP.
- Pennrose Management Company portfolio list
- Draft Resident Selection plan, Grievance Procedure and Preventive maintenance plan
- Staffing Plan

Management Plan

**Wynne Senior Residences**

**November, 2014**

**Pennrose Management Company**  
230 Wyoming Avenue  
Kingston, PA 18704  
(570) 287-2151

Management Plan  
**Wynne Senior Residences**

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EXHIBIT "D": Resident Lease with Attachments	
EXHIBIT "E": Personnel Policies and Procedures	
EXHIBIT "F": Preventive Maintenance Plan	
EXHIBIT "G": Affirmative Fair Housing Marketing Plan	
EXHIBIT "H": Grievance Procedure	

Management Plan  
**Wynne Senior Residences**

PENNROSE MANAGEMENT COMPANY, acting as Agent for Wynne Senior Residences LP, the Owner, proposes the following Management Plan for Wynne Senior Residences, located on 54<sup>th</sup> at 2001-11 54<sup>th</sup> Street, Phila., Pa. Philadelphia County, Pennsylvania. Wynne Senior Residences is a Low Income Housing Tax Credit and Public Housing development, consisting of 50 one and two-bedroom units seniors 62 or older in a four (4) story 54,000 square foot facility.

**I. Management Philosophy and Objectives**

**A. Mission Statement**

Pennrose Management Company is passionate about fostering a culture of respect, creating strong and profitable communities, fulfilling our social mission and welcoming its residents home.

**B. Core Values**

1. Teamwork – We are a collective, cohesive team responsible, individually and accountable for the company’s success.
2. Accountability – We are accountable in our designated roles and responsible to each other and to the success of PMC.
3. Responsiveness – We are dedicated to providing a prompt response to all inquiries and requests within one business day.
4. Respect – We foster a culture of diversity and mutual respect.
5. Open Communication – We promote a harmonious work environment through clear and honest two-way communication.
6. Employee Engagement – We cultivate an environment of engaging and empowering employees through support and celebration of success.
7. Decisiveness – We are committed to executing proactive and prudent decisions through collaboration and consensus based on business needs.
8. Results Oriented – We are dedicated to a results-driven culture to achieve our business and social goals.
9. Leadership Development – We recruit, promote, develop, and retain talented property management professionals.



10. Maximize Asset Values – We ensure maximized asset values by providing well maintained communities, strong revenue, expense management, and excellent customer service.

### **C. Specific Objectives**

The Agent's major objectives in the management of Wynne Senior Residences are to:

- a. Promote sound business management, including prompt payment of all obligations and the timely collection of all rents due, and employ professional property management practices that ensure preservation of the asset, optimal use of fiscal resources and safe, efficient and ethical operation of the site.
- b. Coordinate the involvement of local public and private agencies, which can provide residents with the resources necessary to achieve a more satisfying lifestyle.
- c. Effect the meaningful involvement of residents in the social management of Wynne Senior Residences.

## **II. Program Guidelines and Requirements**

### **A. Role and Responsibility of the Owner and Management Agent**

As a general rule, the Owner will direct the Agent on matters of policy and overall procedure, while the Agent will have direct responsibility for the day-to-day development operations as follows:

1. The Agent shall be responsible for marketing the development in accordance with Public Housing policies and procedures (where applicable), the New Jersey Tax Credit Compliance Manual, the Policy Governing Admissions and Continued Occupancy (“Admissions and Occupancy Policy”) in the case of the public housing units, the Resident Selection Plan in the case of the non-public housing units, the Management Agreement, the Regulatory and Operating Agreement, and the approved Affirmative Fair Housing Marketing Plan. All applicants must meet Pennrose eligibility and screening requirements. Rents for the public housing units will be computed based on Public Housing calculation methods. Maximum unit rents for the residents will be based on Low Income Housing Tax Credit Program limitations, or the Authority’s ceiling and flat rents, whichever may be more restrictive. Residents for the non-Public Housing units will be selected from the site’s waiting list on a first-come, first-served basis. Rents for non-public housing units will be based on Low Income Housing Tax Credit Program limitations.
2. The Agent will follow procedures as outlined in the Agent’s Personnel Policy and Operations Manual in its day-to-day operation of the property.
3. The Agent will attempt to achieve and maintain one hundred percent (100%) occupancy by conducting an affirmative marketing program when necessary and maintaining a waiting list of eligible applicants.

4. The Agent will be responsible for the overall physical condition of the grounds and buildings and for developing and implementing a system for the timely acknowledgment of complaints, including prompt action to correct deficiencies.
5. The Agent will develop and implement a continuing program of social activities with and for apartment residents.
6. The Agent will maintain an accounting and financial reporting system acceptable to the Owner; these records will be made available for inspection by the Owner upon request.
7. The Regional Property Manager will supervise the activities of the Manager at Wynne Senior ResidencesI. The Maintenance staff will be directly responsible to the Manager.
8. All maintenance contracts, service contracts, and insurance policies and claims settlements will be approved by the Owner.

#### **B. Management Fee**

The management fee will pay for overall management expertise and will include:

1. Furnishing all necessary personnel for the supervision of development staff
2. Budget preparation and analysis
3. Hiring and training all on-site staff
4. Executing and monitoring all service contracts
5. Providing liaison with attorneys, government agencies, the Owner and project accountants
6. Providing general overall supervision of the development

#### **C. Personnel Policy and Staffing Arrangements** (*Personnel Policy attached as Exhibit "E"*)

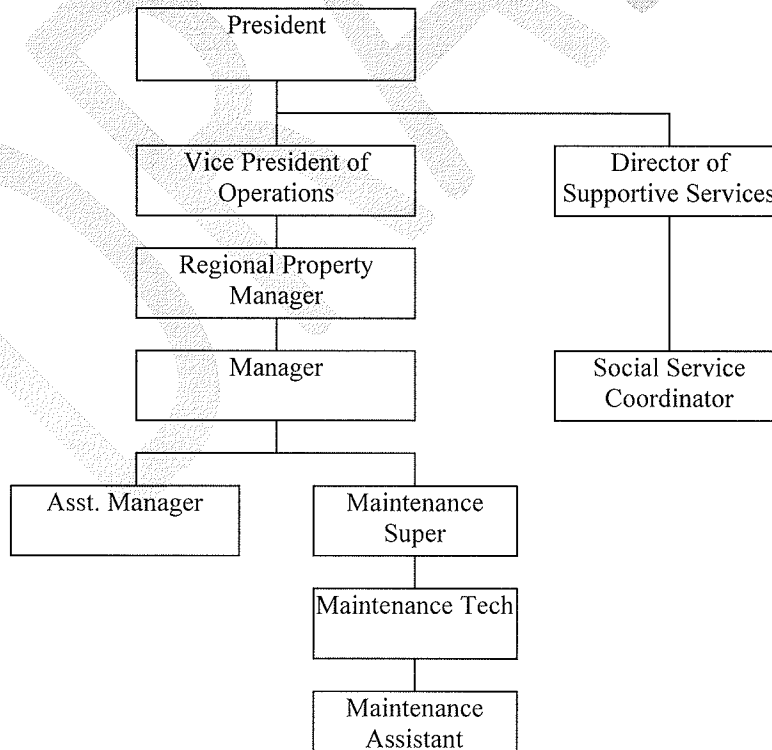
1. All personnel - professional, maintenance and clerical - shall be hired without regard to race, color, sex, age, religion, national origin, disability, sexual orientation or familial status according to Title VII of the Civil Rights Act of 1964, Title VI of the Civil Rights Act of 1964, Section 109 of Title I-Housing & Community Development Act of 1974, Age Discrimination Act of 1975, as amended, Section 504 of the Rehabilitation Act of 1973, as amended, Title VIII of the Civil Rights Act of 1968, Executive Order 11063 and any applicable Equal Opportunity requirements of Federal, State and local laws.
2. Pennrose Management Company is committed to providing employment opportunities to residents of Wynne Senior Residences in the fields of property management and building maintenance.

As part of the Pennrose Resident Hiring Program, residents will be notified of job opportunities via postings at the Job Center, which will be located where all residents may have access to it. Residents will be informed of the details of the Resident Hiring Program at their orientation meeting upon lease-up and through periodic reminders in the monthly newsletter.

Successful applicants who meet all employment eligibility requirements will be provided with on-the-job training and may also qualify for tuition assistance benefits for continuing education in job-related subjects.

3. Staff composition including annual salaries and organizational chart shall be as follows (Job descriptions attached as Exhibit "A"):

- a. Manager (full time, prorated 100%) TBD
- b. Asst. Manager (full time, prorated 100%) TBD
- c. Maintenance Superintendent (full time, prorated 100%) TBD
- d. Maintenance Tech (full time, prorated 100%) TBD
- e. Maintenance Asst. (20 hrs per week) TBD
- f. Social Service Coord. (20 hrs per week) TBD



#### **D. Marketing Effort**

Marketing shall be conducted according to the approved Affirmative Fair Housing Marketing Plan (attached as Exhibit "G"). In addition:

1. A project sign will be placed on the site indicating where to apply for occupancy.
2. Newspaper advertisements and community contact letters will be utilized for ongoing outreach efforts to attract minority and disabled persons.
3. Prospective applicants will be referred to the on-site Rental Office where income and related information is placed on preliminary application forms.
4. Residents and prospective residents are advised of their right to request a reasonable accommodation if any unusual adaptation, changes or additions are required in their living quarters to make their lifestyle while residing at Wynne Senior Residences more manageable.
5. Hearing and speech impaired residents and applicants are provided equal communications accessibility through the use of a professional TDD/TTY service, which is monitored 24 hours a day, 7 days a week.

#### **E. Procedures for Resident Eligibility**

1. The Manager shall preliminarily interview former residents of the existing development and each prospective new resident in order to determine eligibility for occupancy based on 24 CFR 960.202, 960.204, 960.205, 960.206, and the Low Income Housing Tax Credit Program Compliance Manual.
2. Income and asset verifications shall be made by obtaining statements from employers, banks, the Social Security Administration, the Veterans Administration and any other appropriate source. These, as well as all other pieces of documentation required for processing an application, such as disability/medical expenses, Statement of Disposal of Assets, Authorization for Release, Initial Notice of Recertification, Social Security Number, Proof of Age, Application, Home Visit, Credit Report, Landlord Verification, Criminal History Investigation, Valuation of Real Estate, Verification of Citizenship, and any other information pertinent to a particular resident will be retained in the individual resident's file. A signed copy of the Initial Application Tenant Income Certification, Lease, Move-in Inspection and copies of all correspondence and notices of rent increases will also be included in the file. The Agent shall utilize HUD's Enterprise Income Verification System as a third party source to verify tenant employment and income information during mandatory reexaminations or recertifications of family composition and income for public housing units and to reduce administrative and subsidy payment errors in accordance with 24 CFR 5.233, 24 CFR 5.236 and administrative guidance issued by HUD.
3. Before receiving approval for residency at Wynne Senior Residences, each applicant, and all adult members of applicant's household will be required to sign a release,

authorizing Wynne Senior Residences to obtain any and all information regarding the applicant's Criminal History, including Megan's Law registration requirement. A criminal background check will be requested at the time of move-in for all adults, whether they are establishing a household or moving in with a household already in residence. Information received on this report will be used in determining whether or not an applicant will be approved for residency at Wynne Senior Residences. Negative information received can be used as grounds for rejection of the applicant.

An adverse police record would include but not be limited to the following:

- 1) Any drug related convictions.
- 2) Any convictions for assault and/or battery.
- 3) Any felony conviction.
4. In accordance with 24 CFR 960.208, applicants determined to be ineligible for admission will have the opportunity to request an informal hearing based on the Agent's determination.
5. In compliance with HUD regulations dated June 19, 1995, the citizenship of every member of every household must be verified. Households where only some members are U.S. citizens or eligible non-citizens will receive housing assistance on a pro-rated basis. Assistance will only be granted to U.S. citizens or eligible non-citizens.
6. To be eligible, all family members 6 years of age and older must provide a Social Security number or certify that they do not have one. Applicants may not become program participants unless proper documentation is provided pursuant to 24 CFR 5.216.
7. Applicants must meet eligibility requirements of the student rule as it pertains to public housing and the Low Income Housing Tax Credit program.
8. Residents will be selected without regard to race, color, sex, age, religion, national origin, disability, sexual orientation or familial status.
9. Security deposits will be collected in an amount equal to the one month's rent for the non-ACC units, or the resident's share of one month's rent, according to HACP requirements, or ninety-nine (\$99.00) dollars, whichever is greater. The security deposits must be escrowed into an interest-bearing savings account.
10. Incorporated herewith and attached as Exhibit "B" is the Resident Selection Plan with the Rider to Wynne Senior Residences Resident Selection Plan. Notwithstanding anything to the contrary, the Resident Selection Plan and the Rider to Wynne Senior Residences Resident Selection Plan shall control in any conflict with this Management Plan.

11. Transfers to other apartments during occupancy will be made in accordance with the Pennrose Transfer Policy, included as part of the Resident Selection Plan.

#### **F. Rent Collection Policies and Procedures**

The Agent shall make available to the resident in writing, a rent collection policy for Wynne Senior Residences. This policy shall also be posted in the rental office.

1. Rent is due the first (1st) day of each month.
2. Rents will be considered late after the fifth (5th) day. A rental reminder notice shall be placed under applicable resident's door the afternoon of the fifth (5th) day of the month. The Resident Service Coordinator will be copied on all correspondence related to the delinquency to facilitate case management.
3. If the rent is not paid by the close of business on the fifth (5th) day of the month, a fee of \$1.00 per day will be charged for each day the rent is unpaid. The \$1.00 per day penalty will include the days in the 5 day grace period but in no case will the charges exceed \$30.00.
4. On the ninth day of each month a warning letter will be sent to delinquent residents requesting that they make an appointment with the Manager within three (3) working days of that date. Resident Services will be copied on this notice
5. If no mutually acceptable agreement has been reached by the fifteenth (15th) day of the month, written notice of intent to begin eviction proceedings shall be sent. Resident Services will be copied on this notice
6. If no resolution occurs within 24 hours, a Notice to Quit and Deliver is sent to the resident. A copy of this letter shall be sent to the President of Pennrose Management Company and to the Resident Service Coordinator (every effort shall be made to have the resident vacate the premises voluntarily).
7. If no results are obtained, appropriate court action will be commenced.

NOTE: A \$20.00 service fee will be charged on the second or any additional time a check is not honored for payment.

Every effort will be made to assist those who are experiencing budget problems or temporary unemployment difficulties by a) referring them to the Resident Service Coordinator, who will work with them individually, b) setting up an agreed payment plan to carry them through difficult times, and/or c) assisting them to find housing more suitable to their present circumstances.

#### **G. Maintenance and Repair Program**

Property maintenance will be conducted according to the site's Preventive Maintenance Plan, a comprehensive guide that will be developed specifically for Wynne Senior

Residences following completion of construction. The Preventive Maintenance Plan will contain an itemized inventory of building systems and equipment, individual task sheets instructing maintenance staff on frequency and exact actions required in each maintenance function, and schedules for all routine and periodic maintenance functions. All preventive maintenance will be entered into the Yardi Property Management Work Order Program, set to generate work orders for each task when it is due for completion.

1. Scheduled maintenance and repairs for mechanical equipment and appliances in each apartment unit will be in accordance with manufacturer's recommendations and service manuals. Maintenance records will be maintained on all equipment to insure proper service.
2. Inspection of grounds, buildings, and apartment units will be carried out at regular intervals, utilizing the HUD Uniform Physical Conditions Standards Inspection Form for the public housing units, to identify any maintenance problems that can be attended to promptly, to avoid serious problems at a future time.
3. Prior to initial occupancy, the prospective resident and the Agent shall complete a Dwelling Unit Inspection Report, utilizing the HUD Uniform Physical Conditions Standards Inspection Form for the public housing units.
4. When a resident gives a notice to vacate, a date for inspection of his or her unit will be scheduled prior to move-out. At this time the Maintenance Superintendent and the resident will inspect the unit, utilizing the HUD Uniform Physical Conditions Standards Inspection Form for the public housing units, compare any damages or wear with that on the move-in checklist and determine whether the resident must pay for repairs.
5. Prior to re-renting the unit, the Manager will take the same inspection check-list and make all necessary repairs, have the unit repainted, and thoroughly clean and check all equipment and appliances for proper operation and shall utilize the HUD Uniform Physical Conditions Standards Inspection Form for the public housing units.
6. Each resident shall be instructed on home care (i.e. stove, heaters, etc.) as needed.
7. A comprehensive painting schedule will be set up for the development. All vacated apartments will be painted prior to re-occupancy. Apartments occupied continuously by the same resident will be painted every four (4) years at the property's expense or sooner, if necessary, at the resident's expense.
8. The public areas of the building, including entranceways and corridors will be painted or redecorated approximately every four (4) years. Doors that receive heavy use shall be painted with a heavy-duty semi-gloss paint as necessary. In addition, the Manager will insure that interior and exterior surfaces of the building are maintained in prime condition at all times.
9. Exterminating services shall be contracted monthly and at other intervals as necessary.
10. The Agent shall continue to contract for trash removal services at required intervals.

11. All requests for repairs must be submitted by telephoning the Rental Office. A work order will be created and assigned for completion as appropriate. An automated system for after-hours maintenance requests will offer residents the option to place an emergency request for those situations that cannot wait until the next operating day. Normal service repairs will be performed during regular business hours from 9:00 a.m. to 5:00 p.m., Monday through Friday.
12. Maintenance staff will handle all repairs, major and minor, or if necessary, a specialized technician (plumber, electrician) may be obtained with the approval of the Manager.
13. A staff person shall be on call twenty four (24) hours a day, seven (7) days a week in order to handle emergencies which are so serious in nature that they cannot wait to be corrected during regular hours.
14. Any prospective maintenance costs to residents will be clearly posted in the Rental Office. In general, residents will be expected to pay for all property willfully or accidentally destroyed or damaged by them or their guests.
15. With the exception of petty cash items, equipment and supplies shall be ordered on a purchase order and must receive the approval of the Manager.

#### **H. Accounting and Financial Management**

1. The Management Agent shall maintain a permanent system of records and accounts in accordance with the Code of Accounts established for the property and any applicable requirements governing fiscal operations and/or accounting and financial reports for multi-family housing projects.
2. The Manager will maintain files on all residents, which will include applications, lease, income, certifications and recertifications and any other data as required by appropriate governing agencies. These files will be kept confidential in locked filing cabinets.
3. Regular reports of finances and occupancy will be prepared monthly and annually, and submitted to the Owner.
4. The Management Agent shall have a financial statement prepared by a Certified Public Accountant at the end of each operating year and this statement shall be submitted to both the Owner.
5. The Owner will receive the monthly accounting report by the 20th day of the following month, unless some other schedule is desired.
6. The Agent shall, on behalf of the Owner, submit the required annual reports to NJHMFA by the end of January for the previous fiscal year end, as required by the LIHTCP Compliance Manual.



## **I. Resident Management Relations**

### **1. General**

- a) Each new resident will be oriented to the development by the Manager in a private meeting regarding the following areas:
  - 1) Rights and responsibilities of the resident under the lease
  - 2) Location and meeting schedule of civic and/or other resident groups
  - 3) Tips and rules of development living
  - 4) Services provided by the Management
  - 5) Hours of office operation
  - 6) Maintenance and repair request procedures
  - 7) Income recertification and dwelling unit inspection procedures
  - 8) Instructions on operation of all appliances and equipment within the unit
- b) Henceforth, periodic meetings will be arranged between a committee representing the residents and management with regard to any and all complaints, problems, or management procedures that could be corrected or improved by either party.

### **2. Grievance Procedures**

- a) All resident grievances in the area of management services, maintenance services, management policy, management personnel, and grievances concerning other residents will receive prompt, efficient follow-up from the Manager and/or Resident Services.
- b) Grievances that cannot be resolved on-site shall be made in writing to the Management Agent and a meeting between the aggrieved party, the Manager, Resident Services and the Agent shall be called to resolve the issue.

## **J. Eviction Procedures**

The steps the Manager must take to evict a resident for "other good cause" or "material non-compliance" are as follows:

- 1. Tenant must be notified in writing of any violation of the terms of his/her Lease, at such time as Management is made aware of the violation. The notification must include the following information: the specific action (or inaction) which is in violation of the Lease, the date (if known) of the specified violation, the specific clause of the Lease which has been violated, and remedial actions (if any) to be taken. It will specifically advise that additional violations may lead to eviction, and it will instruct the resident to make an appointment to discuss the violation with the Manager.

2. If the resident fails to act upon the instructions of the violation notice, or additional violations occur, a 30-Day "Notice to Quit" is delivered in accordance with HUD procedures as outlined in state and local laws. The number of violations that will be tolerated before eviction varies according to the severity of the violation and the possible existence of mitigating circumstances in a particular case. Therefore, the decision to evict is made on a case-by-case basis.

The Notice to Quit will advise the resident of the reasons for the Notice. It will allow for a 10-day period in which the resident may contact the Management Office to attempt to resolve the issue short of eviction. Failing resolution, at the end of the 30-day Notice, formal eviction proceedings will be initiated.

3. In the case of certain extreme infractions, including, but not limited to, criminal or drug-related activity, that pose a significant threat to the property or its inhabitants, formal eviction proceedings may be initiated upon the first violation.

If a resident is involved in criminal activity that threatens the health, safety or right to peaceful enjoyment of the premises or drug-related criminal activity on or near the premises, the Grievance Procedures do not apply.

#### **K. Social/Supportive Service Programs**

An integral part of this management proposal is the development and implementation of needed and appropriate supportive service programs both to facilitate residents' growth as individuals and to encourage a sense of community among residents. The primary goal of Penrose is to provide and manage quality affordable housing for low/moderate income residents. While Penrose has been successful in achieving that goal, it has become increasingly evident that supportive services must be combined with quality housing to affect the continued stability of a household and a community. Our objective is to help link residents to programs and services that will assist them in improving their quality of life. Desired outcomes include the enhancement of self-esteem, self-sufficiency, and self-empowerment, both as individuals and as a community, and success in school and post-secondary education and employment for children growing up in the neighborhood. Furthermore, in the affordable housing industry supportive services has become a valuable asset management tool. Effective service coordination will help alleviate the challenges that are most common to federally assisted housing communities such as: high turnovers, rental delinquencies, property damages and vandalism, vacancy losses, and evictions. By working proactively in implementing service standards, we will prevent many of the aforementioned situations. From a business perspective having a service-enriched housing community makes good sense – it creates greater resident retention, fewer lease violations and reduced maintenance costs. This helps to stabilize the community and thereby, improves the overall property management through enhanced resident relations and stronger fiscal operations.

Penrose Management Company's philosophy is to utilize the existing services available through public, private and community-based agencies and organizations, bringing services on-site to the maximum extent possible. This also includes coordinating and facilitating access by our residents to available off-site services. PMC is dedicated to the provision of

supportive services that assist residents in addressing their needs. However, each community is different as are the service needs of the residents. Therefore, supportive services are to be implemented in close coordination and communication with the residents to ensure that the services, programs and activities provided meet their needs and desires. To ensure a degree of uniformity with all Pennrose managed properties, it is PMC's goal to offer a basic set of services to all communities. To accomplish this purpose, Minimum Resident Services Standards for our family properties have been developed, as follows:

***Minimum Resident Services Standard for Family Communities***

- \* Establish effective communications through monthly newsletter and regular meetings
- \* Develop a Residents' Association
- \* Coordinate after school programs either on-site or identify other options in the community, such as churches, public schools, YMCA's or Boys & Girls Clubs.
- \* Provide access to summer camping & day camp programs (on and off-site)
- \* Coordinate access to affordable and reliable transportation services with public and private entities. Identify public bus lines and based upon rider-ship, see if transportation routes can be extended to accommodate residents.
- \* Coordinate access to youth recreational activities such as, arts and crafts, scouting programs and sporting activities (on and off-site)
- \* Working with local law enforcement and fire department help to create Community Safety Programs, to include: crime prevention programs, personal safety and fire prevention. In addition, each site is to have an evacuation plan in place in the event of an emergency or fire.
- \* Identify community-based service provider agencies to create adult activity programs appropriate to parents needs such as life skills training, educational and socialization opportunities.
- \* Provide access to financial assistance programs, i.e. energy assistance programs and budget counseling, for example.
- \* Complete a needs assessment every other year to determine desired and needed supportive services.
- \* In accordance with 24 CFR 964, support tenant participation and Tenant Opportunities for Public Housing.

It is important to note that these are minimum standards. Pennrose will have the privilege of working closely with the Housing Authority of the City of Paterson (HACP), and will be able to coordinate the provision of services to the residents of Alexander Hamilton with the supportive services department of HACP. To secure appropriate services for the residents, Pennrose will develop partnerships with well-established service agencies in the City

Paterson and Passaic County. These include organizations such as: Boys and Girls Club of Paterson and Passaic, Inc., Paterson YMCA, Passaic County Learning Center, St. Paul's CDC – Next Step, Paterson Task Force for Community Action, Rutgers Cooperative Extension and the Salvation Army Senior Center.

Additionally, Alexander Hamilton residents will benefit greatly from having a Resident Service Coordinator assigned to the site for approximately 16 hours per week. (See attached job description). The Service Coordinator will report to the Director of Supportive Services for Pennrose Management Company. (See attached job description). A salary allocation of \$14,000 has been included in the operating budget to secure the annual purchase of this service. This is a standard estimate used by Pennrose based on 1 hours of service for every 5 units of housing. The Resident Service Coordinator will work closely with the Director of Supportive Services of Pennrose Management Company and the Property Manager, Maintenance staff, and outside service provider agencies to identify and effectively respond to resident needs, as outlined above, to directly meet the resident's needs on a daily basis. The Resident Service Coordinator will take the lead role in implementing the Pennrose Minimum Service Standards (described below), which includes: organizing services, programs and activities for the residents, as well as maintaining existing and cultivating new liaisons with community resources and services. These community resources are requested to make their services available at no charge to the residents. In cases where there is some minimal charge we ask that it is on a sliding scale in consideration of the limited income of the resident. The Resident Service Coordinator will also encourage and develop resident participation in the decision-making process regarding which services, programs and activities they desire.

**L. Energy Conservation**

1. This development will promote energy efficiency and conservation, operational savings and sustainable building practices, which may include the installation of Energy Star® appliances and mechanical systems as well as the utilization of Green Building practices in design and construction. Management will maintain all such appliances and systems to meet the design standards at all times. As appliances and systems require repair, replacement or retrofit, Management will continue to use only those materials that meet the original energy saving or environmental standards.
2. To conserve water, landscape plantings will be drought-tolerant and will not require irrigation.
3. All maintenance staff will be trained on all materials, systems and equipment used in the construction, including any Green Building components and amenities and how they benefit the property and how to properly maintain them. At the initial training by the contractor, a video will be made of the entire training. Together with the maintenance and operations manual provided by the contractor, a copy will be retained on site in good order in a safe location. All future maintenance staff will receive training using the video and manual.

4. Periodic inspections will be made to determine that all maintenance and upkeep is in compliance with manufacturers recommendations and that all systems and equipment are functioning at optimal efficiency.
5. At lease-signing, all residents will be provided with a Building Guide and orientation, explaining "green" features of the development, how these features benefit the resident population and any responsibilities on the residents' part to preserve or maximize these benefits.
6. At lease-signing, all residents will receive instruction on the care and use of all appliances within the residence to prolong appliance life and maximize energy conservation. Periodic reminders will also be provided via the monthly newsletter, resident meetings or periodic home care seminars.

**M. Units Designed for Use by Disabled Residents**

Units designed with special features for use by mobility, speech and hearing impaired residents have been provided at Wynne Senior Residences.

**1. Initial Occupancy**

During the initial period of occupancy, all handicapped accessible units must be held open for a minimum period of 30 days. If at the end of 30 days persons needing the special amenities in those units have not been identified, those apartments may be rented to non-disabled individuals or families.

**2. Occupancy by Other than Disabled Resident**

In accordance with the requirements of the Low Income Housing Tax Credit Program, preference for units designed for handicap accessibility must be given to those applicants who require the special design features of an accessible unit, i.e., wheelchair, hearing impairment, vision impairment, etc.

When an accessible unit is available and there is no applicant on the waiting list who requires such a unit, the accessible unit may be rented to the first applicant on the waiting list who meets all other selection criteria and whose household size is appropriate for the unit. The household occupying the accessible unit must agree to transfer, at project expense, to another unit when there is an applicant who requires the special accessibility features of the apartment.

Prior notice of the transfer will be given at least 30 days in advance. Residents will not be given a choice of the apartment to which they will transfer. The resident will be given 2 days to complete the actual move and return possession of the present unit back to management.

# MANAGEMENT AND MARKETING EXPERIENCE

List developments managed by Pennrose Management Company

Name of Development	Address of Development	Services Performed		Type of Structures	Number of Units	Type of Mortgage Financing	Subsidy Program (if any)	Name and Address of Owner	Management Fee (% or per Unit)	Marketing Fee (if any)	Dates of Service (started/ ended)
		Management	Initial Marketing								
55 Harvey	New Brunswick, NJ	x	x	Mid-Rise	53		ACC/LIHTC	Providence Square Housing Urban Renewal Associates, L.P.	\$46PUPM	N/A	7/1/10-Present
A Harry Moore	Jersey City, NJ	x	x	Townhomes	60		HOPE VI	AHM Urban Renewal Associates LLC	\$45PUPM	N/A	8/1/11-Present
Academy Place	Trenton, NJ	x	x	Garden	40	Non-Insured	LIHTC	El Barrio Academy Urban Renewal Associates, L.P., Philadelphia, PA	8.0%	N/A	4/1/96-Present
Alexander Hamilton	Paterson, NJ	x	x	Townhomes	80		S8/LIHTC	Alexander Hamilton Associates L.L.C.	\$35PUPM	N/A	9/1/10-Present
Allegheny	Pittsburgh, PA	x	x	Mid-Rise	75	Non-Insured	Section 8	Farmers Market Housing Partnership, L.P., Philadelphia, PA	10.0%	N/A	10/31/99-Present
Allentown Center Sq.	Allentown, PA	x	x	Hi-Rise	63	Non-Insured	LIHTC	Allentown Center Square Housing Partnership, LP, Philadelphia PA	10.0%	N/A	1/1/06-Present
Allison Hill	Harrisburg, PA	x	x	Townhomes	27	Non-Insured	LIHTC	Allison Hill Associates; Philadelphia, PA	10.0%	N/A	9/22/92-5/16/12
Allison Hill II	Harrisburg, PA	x	x	Townhomes	30	Non-Insured	LIHTC	Allison Hill II Associates; Philadelphia, PA	10.0%	N/A	9/1/00-5/16/12
Alton Park Phase I	Chattanooga, TN	x	x	Townhomes	72	Non-Insured	HOPE VI	McCallie Housing Partnership I LLC, Philadelphia, PA	8.0%	N/A	5/23/03-Present
Alton Park Phase II	Chattanooga, TN	x	x	Townhomes	101	Non-Insured	HOPE VI	Alton Park Housing Partnership, LLC, Philadelphia, PA	8.0%	N/A	1/1/04-Present
Alton Park Phase III	Chattanooga, TN	x	x	Townhomes	102	Non-Insured	HOPE VI	The Villages Housing Partnership, LLC, Philadelphia, PA	8.0%	N/A	1/1/06-Present
Angela Court	Philadelphia, PA	x	x	Hi-Rise	67	Non-Insured	LIHTC	St. Ignatius Sr. Housing, L.P., Philadelphia, PA	8.0%	N/A	4/12/02-4/30/10
Arlington Heights Phase I	Youngstown, OH	x	x	Townhomes	46	Non-Insured	HOPE VI	Arlington Heights Housing Partnership, L.P., Philadelphia, PA	6.0%	N/A	1/1/07-Present
Arlington Heights Phase II	Youngstown, OH	x	x	Townhomes	47	Non-Insured	HOPE VI	Arlington Heights Housing Partnership, L.P., Philadelphia, PA	6.0%	N/A	1/1/07-Present
Art Apartments	Philadelphia, PA	x	x	Mid-Rise	30	Non-Insured	LIHTC	Art Apartments Associates, Philadelphia, PA	6.0%	N/A	1/1/03-5/4/10
Artisan's Mill	Trenton, NJ	x	x	Townhomes	31	Non-Insured	LIHTC	Artisan Street Urban Renewal Associates, L.P., Philadelphia, PA	6.0%	N/A	6/11/98-Present
Baldwin's Run	Camden, NJ	x	x	Townhomes	78	Non-Insured	HOPE VI	Westfield Acres Associates, L.P., Philadelphia, PA	6.0%	N/A	1/1/02-Present
Baldwin's Run 8	Camden, NJ	x	x	Townhomes	97	Non-Insured	HOPE VI	Westfield Acres Urban Renewal Associates II, L.P., Philadelphia, PA	\$42.25 PUPM	N/A	1/1/07-Present
Baldwin's Run Senior	Camden, NJ	x	x	Townhomes	74	Non-Insured	HOPE VI	Westfield Acres Urban Renewal Associates III, L.P., Philadelphia, PA	10.0%	N/A	1/1/07-Present
Bernice Arms	Philadelphia, PA	x	x	Mid-Rise	46	Non-Insured	LIHTC	Residences at 6000 Baltimore, L.P., Philadelphia, PA	10.0%	N/A	1/1/98-Present

Bookbindery	Reading, PA								Section 8	Bookbindery Associates; Philadelphia, PA				11/20/90-10/25/13
Braddock aka Avenue Apartments	Braddock, PA								S8/LIHTC	Braddock Housing Initiative, L.P.				3/2/2010-Present
Brantwood II	Philadelphia, PA								LIHTC	Brantwood II Associates; Philadelphia, PA				1/1/98-Present
Brentwood	Philadelphia, PA								Section 8	Brentwood Parkside Associates; Philadelphia, PA				2/1/96-Present
Brownstones at Diamond Street	Philadelphia, PA								LIHTC	Diamond Street Housing Partnership, L.P.				2/2010 - Present
Carpenter Hill	Camden, NJ								LIHTC	32nd Street Urban Renewal Limited Partnership, New Jersey	\$35.00 PUPM			2/2004-12/31/13
Centennial Place Phase I	Farrell, PA								HOPE VI	Steel City Housing Partnership, L.P., Philadelphia, PA	\$41.00 PUPM			7/2/02-1/31/2010
Centennial Place Phase II	Farrell, PA								HOPE VI	Steel City Housing Partnership, L.P. II, Philadelphia, PA	\$41.00 PUPM			12/1/03-1/31/2010
The Chateau	Baltimore, MD								LIHTC	Chateau Housing Partnership, LLC, Philadelphia, PA		8.0%		3/1/02-Present
Chatham Estates	Chester, PA								PHA	Lamokin Senior Village Partnership; Philadelphia, PA		7.5%		7/10/98-Present
Cherry Hill Sr. Housing	Baltimore, MD								LIHTC	Cherry Hill Senior Housing, Philadelphia, PA		8.0%		10/1/01-Present
Christopher A. Smith Terrace	Pittsburgh, PA								PHA	Riverview Terrace Associates; Philadelphia, PA		10.0%		7/1/97-Present
Chuck Costello Independent Living	Old Bridge, NJ								LIHTC	Old Bridge Housing Urban Renewal Associates II, L.P., Philadelphia, PA		6.0%		1/1/06-Present
Church Lane	Philadelphia, PA								Section 8	Church Lane Associates; Philadelphia, PA		10.0%		5/15/83-4/5/12
Clairton	Clairton, PA								LIHTC	Clairton Housing Partnership, L.P., Philadelphia, PA		10.0%		9/1/04-Present
Clayton Court	Wilmington, De								Section 8	Clayton Court Associates; Philadelphia, PA		5.175%		8/15/94-2/1/2009
Cloisters I	Philadelphia, PA								LIHTC	Cloisters I - School Bldg., L.P.; Philadelphia, PA		10.0%		11/22/92-Present
Cloisters II	Philadelphia, PA								LIHTC	Cloisters Limited Partnership II; Philadelphia, PA		10.0%		11/22/92-6/1/2010
Cloisters III	Philadelphia, PA								LIHTC	Cloisters Limited Partnership III; Philadelphia, PA		10.0%		1/1/06-Present
Cloverleaf Village Apartments	Pleasant Mills, PA								Conventional	WG Cloverleaf Associates, L.P.		4.0%		2/13-12/31/13
Commons at Point Breeze	Philadelphia, PA								LIHTC	The Commons at Point Breeze, LP, Philadelphia, PA		8.0%		5/1/07-Present
Community House	Philadelphia, PA								Section 202	Community Renaissance Alliance, Inc., Philadelphia, PA		11.2%		12/23/02-6/30/13
Dan Flood Tower	Kingston, PA								Section 8	First Valley Associates; Philadelphia, PA		6.5%		5/1/81-Present
Diamond Street I	Philadelphia, PA								Section 8	Diamond Street Venture; Philadelphia, PA		10.0%		10/13/89-Present
Diamond Street II	Philadelphia, PA								Section 8	Diamond Phase II Venture; Philadelphia, PA		10.0%		10/1/90-Present

Diamond Street III	Philadelphia, PA	x	x	Garden	35	Non-Insured	Section 8	Diamond Phase III Venture, Philadelphia, PA	10.0%	N/A	2/1/96-Present
Dorado Village	Philadelphia, PA	x	x	Garden	81	HUD-Insured	Section 8	Dorado Venture, Philadelphia, PA	5.4%	N/A	1/5/82-Present
Dunlap	Philadelphia, PA	x	x	Mid-Rise	35	Non-Insured	Section 8	Dunlap School Venture, Philadelphia, PA	10.0%	N/A	10/13/89-3/4/2009
East Hanover St Apts.	Trenton, NJ	x	x	Garden	31	Non-Insured	LIHTC	East Hanover Street Urban Renewal Associates, L.P., Haddonfield, NJ	6.0%	N/A	4/1/98-Present
Eastampton Town Center	Mt. Holly, NJ	x	x	Garden	100	Non-Insured	LIHTC	Eastampton Urban Renewal Assoc., L.P., Haddonfield, NJ	6.0%	N/A	8/1/01-Present
Faison Mews	Camden, NJ	x	x	Gdn/Low-rise	51	Non-Insured	LIHTC	Pearlye Associates, L.P., Philadelphia, PA	6.0%	N/A	1/1/06-Present
Felton Lofts	Steelton, PA	x	x	Low-Rise	83	LIHTC	LIHTC	Steelton Walnut Limited Partnership, a Pennsylvania Limited Partnership	10.0%	N/A	11/1/2011-Present
Fifth Street	Chester, PA	x	x	Townhomes	22	Non-Insured	LIHTC	Chester Renaissance Assoc.; Philadelphia, PA	10.0%	N/A	10/5/92-11/19/2013
Fifth Street Place	Charleroi, PA	x	x	Mid-Rise	12	Non-Insured	LIHTC	Fifth Street Place Associates, L.P., Charleroi, PA	8.0%	N/A	4/1/03-Present
French Creek Manor	Phoenixville, PA	x	x	Mid-Rise	70	Non-Insured	LIHTC	French Creek Housing Partnership, LP, Philadelphia, PA	10.0%	N/A	8/1/04-Present
Glenbrook @ Oxmoor Valley	Birmingham, AL	x	x	Mid-Rise	100	HUD-Insured	LIHTC	Glenbrook @ Oxmoor I, LLC; Kingston, PA	6.0%	N/A	6/2008-Present
Goodwill Neighborhood Res.	Scranton, PA	x	x	Mid-Rise	36	Non-Insured	LIHTC	Lackawanna Housing Partnership; Philadelphia, PA	10.0%	N/A	9/1/97-Present
Governor Hotel	Harrisburg, PA	x	x	Hi-Rise	46	Non-Insured	LIHTC	Governor Hotel Partnership, Lancaster, PA	8.0%	N/A	7/1/02-11/5/12
The Hamilton	Roughkeepsie, NY	x	x	Mid-Rise	54	Non-Insured	LIHTC	400 Main Street LLC	6.0%	N/A	9/1/05-3/31/11
Hanover Senior Residences	Hanover, PA	x	x	Low-Rise	24	Non-Insured	LIHTC	Hanover Office Limited Partnership I	7.5%	N/A	1/1/07-Present
Hanover Shoe	Hanover, PA	x	x	Mid-Rise	70	LIHTC	LIHTC	Hanover Housing Partnership, L.P.,	10.0%		11/2000-Present
Herman E Kapp Sr Residences	Flemington, NJ	x	x	Hi-Rise	60	Non-Insured	LIHTC	Church Street Housing Urban Renewal Associates, LP, Philadelphia, PA	6.0%	N/A	11/22/05-Present
Hershey Plaza	Hershey, PA	x	x	Hi-Rise	216	Non-Insured	Section 8	Hershey Plaza Associates; Philadelphia, PA	5.5%	N/A	5/1/81-Present
Hopes Crossing	Tom's River, NJ	x	x	Townhomes	125	Non-Insured	Section 8/ LIHTC	Cox Cro Urban Renewal Assoc., L.P.;	10.0%	N/A	1/1/95-Present
Imani Homes	Philadelphia, PA	x	x	Townhomes	24	Non-Insured	Section 8	Imani Homes, L.P.; Philadelphia, PA	9.0%	N/A	8/1/96-Present
J. Frank Budd Bldg (West Electronics)	Burlington, NJ	x	x	Mid-Rise	36	Non-Insured	LIHTC	Dilwyn Urban Renewal Associates, L.P., Philadelphia, PA	7.5%	N/A	5/1/02-Present
Jeffers Square	Chester, PA	x	x	Townhomes	36	Non-Insured	LIHTC	Jeffers Square Housing Partnership, L.P.;	10.0%	N/A	6/1/95-Present
Jefferson Heights	New Britian, CT	x	x	Mid-Rise	68	Non-Insured	LIHTC	Jefferson Heights Housing, LLC Philadelphia, PA	\$35.00 PUPM	N/A	4/1/13-Present
Jefferson School Apts.	Pottstown, PA	x	x	Mid-Rise	46	Non-Insured	LIHTC	Jefferson School Housing Partnership, L.P., Philadelphia, PA	10.0%	N/A	1/11/02-Present
King's Highway II	Philadelphia, PA	x	x	Low-Rise	31	Non-Insured	LIHTC	King's Highway II & Associates, Philadelphia, PA	10.0%	N/A	3/13/00-1/1/2008
King's Plaza	Perth Amboy, NJ	x	x	Hi-Rise	249	Non-Insured	LIHTC	King's Plaza, LLC	6.0%	N/A	1/1/07-6/3/2009
Landreth	Philadelphia, PA	x	x	Mid-Rise	51	Non-Insured	LIHTC	Landreth Venture, Philadelphia, PA	10.0%	N/A	12/10/91-3/9/2009



Laurel Estates	Uniontown, PA	x	x	Townhomes	56		LIHTC	Laurel Estates Housing LP		6.0%	N/A	12/1/2007-Present
Legacy Commons	Farrell, PA	x	x	Duplexes	29	Non-Insured	LIHTC	Legacy Commons Housing Partnership, L.P., Philadelphia, PA		10.0%	N/A	11/07/02-1/31/2010
Lehigh Coal & Navigation Bld.	Jim Thorpe, PA	x	x	Mid-Rise	27	Non-Insured	Section 8	Tyko Associates, Philadelphia, PA		5.0%	N/A	1/1/98-Present
Liberty House	Phoenixville, PA	x	x	Mid-Rise	48	Non-Insured	Section 8	Liberty House Associates, Philadelphia, PA		8.0%	N/A	11/28/95-Present
Liberty Place	Fort Lee, NJ	x	x	Hi-Rise	60	Non-Insured	LIHTC	Fort Lee Housing Associates, L.P., Philadelphia, PA		6.0%	N/A	1/1/04-Present
Limerick Green	Limerick, PA	x	x	Low-Rise	80	Non-Insured	LIHTC	Limerick Green Housing Partnership, Philadelphia, PA		10.0%	N/A	7/15/98-Present
Lincoln Residences	Reading, PA	x	x	Hi-Rise	52	Non-Insured	LIHTC	Lincoln Renaissance, Philadelphia, PA		10.0%	N/A	4/1/93-12/21/2012
Lincoln Park IA	Springfield, OH	x	x	Townhomes	40	Non-Insured	HOPE VI	Lincoln Park Housing Partnership, LP, Philadelphia, PA		6.0%	N/A	1/1/07-Present
Livingston Manor	New Brunswick, NJ	x	x	Hi-Rise	50	Non-Insured	LIHTC	Livingston Manor Urban Renewal Assoc., L.P., Philadelphia, PA		6.5%	N/A	5/9/95-Present
Lofts at Brewerytown	Philadelphia, PA	x	x	Hi-Rise	61	Non-Insured	LIHTC	Master Street Housing Partnership, L.P., Philadelphia, PA		8.0%	N/A	12/9/04-Present
Maier Manor	Old Bridge, NJ	x	x	Hi-Rise	100	Non-Insured	LIHTC	Old Bridge Housing Partnership, L.P., Philadelphia, PA		6.0%	N/A	1/1/04-Present
Manchester I	Pittsburgh, PA	x	x	Townhomes	20	Non-Insured	HOPE VI	Manchester Housing Partnership, LP I, Philadelphia, PA		10.0%	N/A	5/1/97-Present
Manchester II	Pittsburgh, PA	x	x	Townhomes	25	Non-Insured	HOPE VI	Manchester Housing Partnership, LP II, Philadelphia, PA		10.0%	N/A	5/1/97-Present
Manchester III	Pittsburgh, PA	x	x	Townhomes	20	Non-Insured	HOPE VI	Manchester Housing Partnership, LP III, Philadelphia, PA		10.0%	N/A	7/15/98-Present
Manchester IV	Pittsburgh, PA	x	x	Townhomes	23	Non-Insured	HOPE VI	Manchester Housing Partnership, L.P. IV, Philadelphia, PA		10.0%	N/A	5/14/99-Present
Manchester Renaissance	Pittsburgh, PA	x	x	Townhomes	15	Non-Insured	N/A	Renaissance Housing PP I LP, Pittsburgh, PA		10.0%	N/A	1/1/06-Present
Mansion Court	Philadelphia, PA	x	x	Garden	30	Non-Insured	Section 8	Mansion Court Associates, Philadelphia, PA		10.0%	N/A	11/10/93-8/3/2012
Mansion Court Phase II	Philadelphia, PA	x	x	Garden	19	Non-Insured	LIHTC	Mansion Court Phase II Venture, Philadelphia, PA		10.0%	N/A	12/6/95-8/3/2012
Maple Shade Mews	Burlington, NJ	x	x	Hi-Rise	100	Non-Insured	LIHTC	North Fork Landing Urban Renewal Associates, L.P., Philadelphia, PA		6.0%	N/A	1/1/04-Present
Maple Village/CIP	Philadelphia, PA	x	x	Mid-Rise	70	Non-Insured	LIHTC	Center in the Park Senior Housing, L.P., Philadelphia, PA		10.0%	N/A	4/19/02-Present
Marion Terrace	Wilkes-Barre, PA	x	x	Townhomes	200	Non-Insured	Section 8	Hanover Associates, Philadelphia, PA		6.0%	N/A	5/1/81-Present
Market Court	Harrisburg, PA	x	x	Townhomes	12	Non-Insured	LIHTC	Market Court Limited Partners, Harrisburg, PA		7.5%	N/A	9/24/01-5/11/12
Marlton Residences	Philadelphia, PA	x	x	Mid-Rise	25	Non-Insured	LIHTC	Marlton Housing Partnership, L.P., Philadelphia, PA		10.0%	N/A	12/1/98-Present
Martin Luther King HOPE VI Phase I	Philadelphia, PA	x	x	Townhomes	48	Non-Insured	HOPE VI	Uni-Penn Housing Partnership I, Philadelphia, PA	\$41 PUPM		N/A	8/1/02-Present
Martin Luther King Phase III	Philadelphia, PA	x	x	Townhomes	50	Non-Insured	HOPE VI	Uni-Penn Housing Partnership III, Philadelphia, PA	\$41 PUPM		N/A	4/17/03-Present
Mary Taylor House	West Chester, PA	x	x	Mid-Rise	60	Non-Insured	LIHTC	326 N. Walnut Street, LP		10.0%	N/A	12/23/2010-Present

McCorryn Square	Trenton, NJ		x	x	Mid-Rise	70	Non-Insured	LIHTC	McCorryn Square Associates, L.P.; Philadelphia, PA	6.0%	N/A	4/1/98-Present
McFarland	Harrisburg, PA		x	x	Mid-Rise	49	Non-Insured	LIHTC	McFarland Press Associates; Philadelphia, PA	10.0%	N/A	11/25/96-5/16/12
Meadow Heights	Uniontown, PA		x		Low-Rise	60	Non-Insured	LIHTC	Uniontown Sr. Housing, L.P., Uniontown, PA	8.0%	N/A	4/1/03-1/1/12
Metropolitan Inn	Burlington, NJ		x	x	Mid-Rise	16	Non-Insured	LIHTC	Metropolitan Inn Urban Renewal Associates, L.P., Phila., PA	6.0%	N/A	5/1/02-Present
Monroe Meadows	Monroeville, PA		x	x	Townhomes	48	Non-Insured	LIHTC	Monroe Meadows Housing Partnership, L.P., Philadelphia, PA	9.00%	N/A	1/10/01-Present
Montgomery Street	Newark, NJ		x	x	Mid-Rise	80		LIHTC	Montgomery Street Housing Urban Renewal, LLC	\$45 PUPM	N/A	9/1/2010-Present
Neston Heights	Easton, PA		x	x	Townhomes	56		HOPE VI	Delaware Terrace Housing II, L.P.	6.00%	N/A	9/1/2010-Present
Neumann North	Philadelphia, PA		x	x	Hi-Rise	67	Non-Insured	HOPE VI	Neumann North, L.P., Glenside, PA	8.0%	N/A	6/14/04-9/15/2009
New Amsterdam Apartments	Washington, DC		x		Hi-Rise	90	Non-Insured	N/A	New Amsterdam Assoc., LLC; Philadelphia, PA	6.0%	N/A	7/15/96-2/26/10
Oaks at Camden	Chattanooga, TN		x	x	Townhomes	57	Non-Insured	HOPE VI	Johnson Apartments, LLC, Chattanooga, TN	6.0%	N/A	1/1/07-Present
Oaks at Liberty	Baltimore, MD		x	x	Hi-Rise	75	Non-Insured	LIHTC	Oaks at Liberty, LLC; Philadelphia, PA	7.0%	N/A	8/31/99-Present
Orchard Ridge Phase I	Baltimore, MD		x	x	Townhomes	100	Non-Insured	HOPE VI	Orchard Ridge Development, LLC	7.0%	N/A	1/1/07-Present
Overlook Park 1A	Allentown, PA		x	x	Townhomes	80	N/A	HOPE VI	HART I Housing Partnership, LP, Philadelphia, PA	6.0%	N/A	9/21/2006-Present
Overlook Park 1B	Allentown, PA		x	x	Townhomes	79	Non-Insured	HOPE VI	HART II Housing Partnership, LP, Philadelphia, PA	6.0%	N/A	11/2006-Present
Overlook Park 2A	Allentown, PA		x	x	Townhomes	60		HOPE VI	HART III Housing Partnership, LP, Philadelphia, PA	6.0%	N/A	21/11/2007 to Present
Overlook Park 2B	Allentown, PA		x	x	Townhomes	50		HOPE VI	HART IV Housing Partnership, LP, Philadelphia, PA	6.0%	N/A	3/13/2009
Oxford	Oxford, PA		x	x	Mid-Rise	22	Non-Insured	Section 8	Oxford Housing Venture; Philadelphia, PA	8.0%	N/A	11/8/93-Present
Oxford Village	Oxford, PA		x	x	Townhomes	50	Non-Insured	LIHTC	Oxford Village Housing Partnership; Philadelphia, PA	10.0%	N/A	7/5/98-Present
Parkside Apartments	Philadelphia, PA		x	x	Walk-up	64	Non-Insured	Section 8	Redevelopment Authority of the City of Philadelphia; Philadelphia, PA	6.0%	N/A	6/1/99-5/4/10
Pelletieri Homes	Trenton, NJ		x	x	Mid-Rise	69	Non-Insured	LIHTC	Pelletieri Homes Development, LP; Philadelphia, PA	6.0%	N/A	9/1/97-Present
Penn Street	Chester, PA		x	x	Townhomes	15	Non-Insured	LIHTC	Penn Apartment Associates; Philadelphia, PA	10.0%	N/A	2/1/94-11/19/13
Pennsburg Commons	Pennsburg, PA		x	x	Townhomes	50	Non-Insured	LIHTC	Pennsburg Housing Partnership, LP; Philadelphia, PA	10.0%	N/A	1/20/00-Present
Pleasant Ridge I	McKees Rocks, PA		x	x	Townhomes	112	Non-Insured	HOPE VI	Ohioview Housing Partnership, LP, Philadelphia, PA	\$42.00 PUPM	N/A	9/1/04-9/1/10
Pleasant Ridge II	McKees Rocks, PA		x	x	Townhomes	69	Non-Insured	HOPE VI	Ohioview Housing Partnership, LP II, Philadelphia, PA	\$42.00 PUPM	N/A	1/1/05-9/1/10
Plymouth Place	Hammonton, NJ		x	x	Garden	128	Non-Insured	LIHTC	Plymouth Place Limited Partnership; Virginia Beach, VA	5.75%	N/A	6/12/00-Present
Presidential Estates	Long Branch, NJ		x	x	Townhomes	70	Non-Insured	HOPE VI	Grant Court Housing Associates, LLC	6.0%	N/A	1/1/07-Present

Providence Square	New Brunswick, NJ		x	x	Hi-Rise	98	Non-Insured	Section 8/ LIHTC	Providence Square Urban Renewal Associates, L.P., Philadelphia, PA	6.5%	N/A	5/28/93-Present
Regent Terrace	Philadelphia, PA		x	x	Low-Rise	80	HUD-Insured	Section 8	Regent Street Associates; Philadelphia, PA	7.88%	N/A	6/29/87-Present
Renaissance at Reservoir Hill	Baltimore, MD		x	x	Townhomes	64	Non-Insured	HOPE VI	Reservoir Hill Housing, LLC, Philadelphia, PA	\$39.40 PUPM	N/A	11/1/05-Present
Reserve at Summerset	Pittsburgh, PA		x	x	Townhomes	40	Non-Insured	N/A	Summerset Housing Partnership, L.P., Philadelphia, PA	4.00%	N/A	12/20/01-Present
Residence at Hanover Shoe	Hanover, PA		x	x	Mid-Rise	70	Non-Insured	LIHTC	Hanover Housing Partnership, L.P., Philadelphia, PA	10.00%	N/A	1/20/00-Present
Residences at Falls Ridge	Philadelphia, PA		x	x	Townhomes	135	Non-Insured	HOPE VI	Ridge Avenue Housing Partnership, LP, Philadelphia, PA	\$41 PUPM	N/A	9/1/03-Present
Rittenhouse	Norristown, PA		x	x	Mid-Rise	48	Non-Insured	Section 8	Rittenhouse School, L.P., Philadelphia, PA	10.0%	N/A	10/4/96-Present
River Street	Red Bank, NJ		x	x	Mid-Rise	63	Non-Insured	LIHTC	River Street Urban Renewal Associates, L.P.; Philadelphia, PA	6.5%	N/A	4/13/95-Present
Riviera Apts.	Baltimore, MD		x	x	Hi-Rise	54	Non-Insured	N/A	Penn - HOPE Limited Partnership; Philadelphia, PA	8.0%	N/A	11/00-Present
Rockoff Hall	New Brunswick, NJ		x	x	Hi-Rise	186	N/A	N/A	Rutgers University, New Brunswick, NJ		N/A	1/1/05-1/31/2013
Roosevelt 7	Camden, NJ		x	x	Townhomes	74	N/A	HOPE VI	Centerville Housing Urban Renewal Associates, LLC	\$30PUPM	N/A	2/26/2008 to Present
Roosevelt 12	Camden, NJ		x	x	Townhomes	70	N/A	HOPE VI	Centerville Urban Renewal 12, LLC	\$30PUPM	N/A	5-9-2008 to Present
Roosevelt 14	Camden, NJ		x	x	Townhomes	58	N/A	HOPE VI	Branch Village Housing Urban Renewal, LLC	\$30PUPM	N/A	9/13/2010 to Present
Rush Crossing	Trenton, NJ		x	x	Townhomes	73	N/A	LIHTC	Carl Miller Associates I, LLC, Kingston, PA	6.0%	N/A	12/2012-Present
Saint Luke's Manor	Cleveland, OH		x	x	Hi-Rise	72		LIHTC	St. Luke's Housing Partnership, LLC	6.0%	N/A	5/11-1-Present
Salem Historic Homes Phase I	Salem, NJ		x	x	Townhomes	63	Non-Insured	LIHTC	Salem Housing Partnership, L.P., Philadelphia, PA	6.0%	N/A	2/1/02-Present
Salem Historic Homes Phase II	Salem, NJ		x	x	Townhomes	41	Non-Insured	LIHTC	Salem Housing Partnership, L.P. II, Philadelphia, PA	6.0%	N/A	2/1/02-Present
Sartain Apts.	Philadelphia, PA		x	x	Mid-Rise	35	Non-Insured	Section 8	Sartain School Venture; Philadelphia, PA	10.0%	N/A	6/10/02-3/4/2009
Seaview Manor	Long Branch, NJ		x	x	Townhomes	40	Non-Insured	HOPE VI	Seaview Housing Associates, LLC, Philadelphia, PA	\$42.25 PUPM	N/A	1/1/07-Present
Sheldrake Apts	Philadelphia, PA		x	x	Mid-Rise	33	Non-Insured	LIHTC	Redevelopment Authority of the City of Philadelphia; Philadelphia, PA	8.0%	N/A	5/1/03-Present
Skyline Tower	New Brunswick, NJ		x	x	Hi-Rise	70	Non-Insured	LIHTC	Skyline Towers Urban Renewal Associates, L.P., Phila., PA	4.0%	N/A	8/3/01-Present
Spencers Place	Philadelphia, PA		x	x	Townhomes	22	Non-Insured	LIHTC	Aspen-Olive Associates; Philadelphia, PA	10.0%	N/A	3/1/96-Present
Spring Garden Apts	Philadelphia, PA		x	x	Mid-Rise	9	Non-Insured	LIHTC/Section 8	RBM Associates	10.0%	N/A	11/1/90 - 4/24/2009
Studevan School	Darby Twp., PA		x	x	Mid-Rise	36	Non-Insured	LIHTC	Studevan School Housing Partnership; Philadelphia, PA	8.0%	N/A	1/1/99-Present
Susquehanna II	Philadelphia, PA		x	x	Garden	47	Non-Insured	Section 8	Susquehanna Partners, L.P.; Philadelphia, PA	6.0%	N/A	1/1/93-5/4/10
Tasker Village	Philadelphia, PA		x	x	Townhomes	28	Non-Insured	LIHTC	Tasker Village Associates; Philadelphia, PA	8.0%	N/A	5/1/94-2/28/11

Temple Apts.	Edwardsville, PA	x	x	Hi-Rise	93	HUD-Held	202/Sept. 8	Temple Bnai Brith Housing for the Elderly, Inc.; Kingston, PA	5.69%	N/A	1/1/86-Present
Tioga Gardens	Philadelphia, PA	x	x	Townhomes	33	Non-Insured	Section 8	Tioga Gardens, L.P.; Philadelphia, PA	10.0%	N/A	12/11/95-5-1-12
Tullio Towers	Erie, PA	x	x	Hi-Rise	112	Non-Insured	Section 8/ LIHTC	Pennsylvanian House Partnership, LP, Philadelphia, PA	5.5%	N/A	1/1/07-Present
Universal Court I	Philadelphia, PA	x	x	Row house	32	Non-Insured	LIHTC	Universal Court Associates; Philadelphia, PA	10.0%	N/A	12/97-Present
Universal Court II	Philadelphia, PA	x	x	Townhomes	21	Non-Insured	LIHTC	Universal Court II Associates; Philadelphia, PA	10.0%	N/A	7/1/98-Present
Universal Point	Philadelphia, PA	x	x	Townhomes	53	Non-Insured	LIHTC	Universal Point, L.P., Philadelphia, PA	10.0%	N/A	1/1/00-Present
Upland Estates	Upland, PA	x	x	Townhomes	51	Non-Insured	LIHTC	Upland Estates Housing Partnership, LP, Philadelphia, PA	10.0%	N/A	10/1/06-Present
Vernon House	Philadelphia, PA	x	x	Mid-Rise	68	Non-Insured	LIHTC	Vernon House Housing Partnership, L.P., Philadelphia, PA	10.0%	N/A	1/1/05-Present
Wellington Ridge I	Chester, PA	x	x	Townhomes	56	Non-Insured	HOPE VI	Wellington Housing Partnership, LP I, Philadelphia, PA	6.0%	N/A	11/19/01-Present
Wellington Ridge II	Chester, PA	x	x	Townhomes	54	Non-Insured	HOPE VI	Wellington Housing Partnership, LP II, Philadelphia, PA	6.0%	N/A	7/23/01-Present
Widow's Home	Pittsburgh, PA	x	x	Mid-Rise	24	Non-Insured	LIHTC	Renaissance Housing FP II LP, Pittsburgh, PA	10.0%	N/A	1/1/06-Present
Winding Ridge	Neptune, NJ	x	x	Townhomes	99	Non-Insured	LIHTC	Neptune Venture; Philadelphia, PA	10.0%	N/A	2/1/96-Present
Woodlayne Court	Middletown, PA	x	x	Mid-Rise	44	Non-Insured	LIHTC	Middletown Associates, Philadelphia, PA	10.0%	N/A	9/16/91-5/16/12

Resident Selection Plan  
Wynne Senior Residences

Draft



# Resident Selection Plan

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## Resident Selection Plan

### Property Information

Property Name	Wynne Senior Residences
Property Contact Name	TBD
Address	69-83 straight street
City, State, Zip	Paterson, NJ 07501
Phone	TBD
Fax	TBD
TTY/TDD/Audio Relay	711 National Voice Relay

### The Purpose of the Resident Selection Plan

The resident selection plan helps to ensure that applicants are selected for occupancy in accordance with the Low Income Housing Tax Credit and Public Housing requirements and established management policies. Please contact the management office if you need help understanding this document.

### Smoke Free Housing

Smoking is prohibited in any area of the property, both private and common, whether enclosed or outdoors. This policy applies to all owners, applicants, residents, guests, and servicepersons. "Smoking" shall include the inhaling, exhaling, burning, or carrying of any lighted cigarette, e-cigarette, cigar, pipe, other tobacco products, marijuana including medical marijuana, herbal smoking products "Legal Weed" or products known as "bath salts" or illegal substance.

### Policies to Comply With Section 504 of the Rehabilitation Act of 1973 and the Fair Housing Act Amendments of 1988 and Title VI of the Civil Rights Act of 1964

#### FAIR HOUSING

The Fair Housing Act prohibits discrimination in housing and housing related transactions based on race, color, religion, sex, national origin, disability, and familial status.

#### SECTION 504 OF THE REHABILITATION ACT OF 1973

PMC complies with Section 504 of the Rehabilitation Act of 1973 which prohibits discrimination, based on the presence of a disability in all programs or activities operated by recipients of federal financial assistance. Although Section 504 often overlaps with the disability discrimination prohibitions included in the Fair Housing Act, it differs in that it also imposes broader affirmative obligations on the owner/agent to make their programs, as a whole, accessible to persons with disabilities.





## Resident Selection Plan

### COORDINATING EFFORTS TO COMPLY WITH SECTION 504 REQUIREMENTS

The owner/agent has designated a person to address questions or requests regarding the specific needs of residents and applicants with disabilities. This person is referred to as the Section 504 Coordinator.

Name of Section 504 Coordinator:	Juanita Maiga
Address:	1301 N. 31 <sup>st</sup> Street Philadelphia, PA 19121
Phone Number:	267-386-8692
TDD/TTY Number:	711 Voice Relay

### REQUESTS FOR REASONABLE ACCOMMODATION OR MODIFICATION

In accordance with the Fair Housing Act and Section 504 of the Rehabilitation Act, the owner/agent will make reasonable accommodations or modifications for individuals with disabilities (applicants or residents) unless these modifications would change the fundamental nature of the housing program or result in undue financial and administrative burden. Please see Appendix A for additional information.

### Eligibility Requirements

#### PROPERTY ELIGIBILITY DEFINITION

#### Household/Resident Type

Wynne Senior Residences is a Low Income Housing Tax Credit (LIHTC) property with (25) units with project based Vouchers and is designed to provide housing to families who meet the eligibility and screening requirements.

We are pledged to the letter and spirit of U.S. policy for the achievement of equal housing opportunity throughout the Nation. We encourage and support an affirmative advertising and marketing program in which there are no barriers to obtaining housing because of race, color, religion, sex, handicap, familial status, national origin, sexual orientation or gender identity.

#### Income Limits

Income limits vary by household size. Management will provide applicants a copy of the income limits for the property area upon request. In addition, applicants can review the income limits by accessing the following web site. <http://www.huduser.org/datasets/il.html>

HUD requires that property managers incorporate the most recently published income limits when determining eligibility. Income limits are updated annually (usually around December).



## Resident Selection Plan

### Occupancy Standards

Occupancy standards serve to prevent the over-utilization or under-utilization of units that can result in an inefficient use of housing funding. Occupancy standards also ensure that applicants and residents are treated fairly and consistently and receive adequate housing space.

Below, please find this property's occupancy standards description:

Number of Bedrooms	Min. # Household Members	Max. # Household Members
1	1	2
2	2	4

Any household placed in a unit size different from that defined in these Occupancy Standards shall agree to transfer to an appropriate size unit when one becomes available.

### Verifying the Need for an Accessible Unit

When an applicant requests an accessible unit or a unit preference, such as a first floor unit, the owner/agent will conduct inquiries to:

- 1) Verify that the applicant is qualified for the unit, which is only available to persons with a disability or to persons with a particular type of disability
- 2) Verify that the applicant needs the features of the unit as an accommodation to his or her disability
- 3) Verify that the applicant is qualified to receive a priority on the waiting list available to persons with a disability or to persons with a particular type of disability

### Program Eligibility

Based on federal regulations, PMC may admit only eligible applicants. In the selection of applicants for admission, eligibility criteria have been established in accordance with LIHTC guidelines.

The following eligibility standards will be applied in accordance with LIHTC requirements:

- 1) The household's annual income must not exceed program income limits at move-in.
- 2) The household size must be appropriate for the available apartments.
- 3) All information reported by the household is subject to verification.

### Eligibility of Students Enrolled at an Institute for Higher Education for Assisted Housing under Section 8 of the US Housing Act of 1937

Student eligibility is determined at move-in/initial certification and at each annual certification. If student status changes for an adult during residency, the resident must report the change in student status. Eligibility will be determined to see if the household may continue to receive assistance as well



## Resident Selection Plan

as continue to reside within the community. If an applicant or resident is a student, the following criteria must be met in order for that household to be considered eligible.

1. Any member of the household is married and either files or is entitled to file a joint tax return.
2. The household consists of a least one single parent and his or her minor children, and the parent is not a dependent of a third party. Any children may be claimed as a dependent of either parent, regardless of tenancy in unit.
3. At least one member of the household receives assistance under Title IV of the Social Security Act. (AFDC, TANF, etc. – Not SSA or SSI)
4. At least one member is enrolled in a job training program receiving assistance under the Work Investment Act (WIA) formerly known as the Job Training Partnership Act, or similar federal, state or local laws
5. At least one member of the household is under age 24 and has exited the Foster Care system within the previous 6 years.

For purposes of determining the eligibility of a person to receive assistance under Section 8 of the United States Housing Act of 1937, any financial assistance (in excess of amounts received for tuition) that an individual receives under the Higher Education Act of 1965 from private sources or an institution of higher education (as defined under the Higher Education Act of 1965) shall be considered income to that individual, except for:

- 1) A person 24 years of age or older with dependent children as defined by HUD or
- 2) A person living with his/her parents

### Determination of Applicant Eligibility

Information needed to determine applicant eligibility shall be obtained, verified, and the determination of applicant eligibility performed, in accordance with LIHTC eligibility requirements.

PMC will make a preliminary eligibility determination before adding a household to the waiting list or initiating final eligibility tasks. PMC will review the application to ensure that there are no obvious factors that would make the applicant ineligible. If a preliminary eligibility review indicates that a household is eligible for tenancy, but units of appropriate size are not available, the owner/agent will place the household on the waiting list for the property and notify the household when a suitable unit becomes available.

If an applicant is otherwise eligible but no appropriate size unit exists in the property, the owner/agent will reject the application.

### Final Determination of Eligibility

When a unit becomes available, all eligibility criteria, including the criteria described above will be reviewed before a final eligibility determination is made.

Being eligible, however, does not guarantee that the application will be approved. All adult applicants (and if appropriate minors) will be subject to the certain screening based on landlord/rental history,



## Resident Selection Plan

credit history and criminal history. If the screening process determines that the family meets PMC's standards for admission, the family is found eligible.

### Procedures for Taking Applications

It is PMC's policy to accept and process applications in accordance with LIHTC/Public Housing regulations when applicable. PMC will make a reasonable accommodation to assist in the application process if the applicant or any member of the applicant household is disabled.

Upon request, Management will provide interested parties with a copy of the application package.

The person who is indicated as the Head-of-Household must execute and sign all documents that are included in the application package. Before completing or executing any forms, additional copies should be made for all adult household members and in some cases for minors who will live in the unit.

All adult applicants must complete the application package as instructed.

Please contact the management office staff if a live-in aide will be moving in to the unit. If the family plans to include a live-in aide, the live-in aide is not required to complete the same application forms. Live-in aides must complete the Live-in Aide Questionnaire and screening and other O/A verifications that are required.

The live-in aide has no rights to the unit and will be required to relinquish possession of the unit within a reasonable time as stipulated by the owner/agent. The live-in aide will be required to sign an acknowledgement the live-in aide has no right of residency or occupancy if the resident moves out for any reason including death.

The management company requires applicants to provide a government issued photo ID - used for verifying the identity of all applicants - to accompany applications. In some cases and when appropriate, this ID may also be used to verify age and citizen/non-citizen eligibility status. If the applicant is not able to visit the site, alternative means of verifying identity, such as Skype, may be utilized.

The management company requires a birth certificate or other documentation that can be used to verify age, citizen/non-citizen eligibility status and relationship to other household members.

All applications can be submitted on site at the property management office. The owner/agent will accept applications via mail. The owner/agent will also accept the application in an equally effective format, as a reasonable accommodation, if there is the presence of a disability.

All documents in the Application Package must be **completed in full**, signed and dated in order to be accepted. Applicants will not be added to the waiting list until all application forms have been properly completed and signed as appropriate. Incomplete Application Packages will be returned.



# Resident Selection Plan

## Waiting Lists

Potentially eligible and acceptable applicants for whom the right size unit is not available will be placed on either the Tax Credit or the Project Based Voucher waiting list of their choice or both and informed (1) that they will be contacted when an appropriate unit becomes available, and (2) approximately how long it will take for a unit to become available. The waiting list may be closed, with approval from the Agency, for more than one unit sizes when the average wait for admission is more than one year.

The units are offered on a first come first serve basis, and will include the following information: date and time the applicant submitted the application; name of Head of Household, accessible unit need status and unit size. When a vacancy must be filled, the Waiting List will be reviewed and applicants will be pulled based on availability.

The waiting list will be updated annually to ensure that applicant information is current and that any names that should no longer be on the list are removed. If any names are removed from the Waiting list, the removal will be documented. Names may be removed from the Waiting List if: the applicant no longer meets the eligibility requirements for the property based on the family composition and the unit availability at the site; the applicant fails to respond to the written notice for an eligibility interview; the applicant refuses an offer; mail sent to the applicant's address is returned as undeliverable.

**Once an applicant is placed in either a Tax Credit or a Project Based Voucher unit, and their name is listed on both waiting lists, their name will be removed from all waiting lists.**

## Project Based Voucher

There are Twenty five units with Project based vouchers. These units are reserved for the individuals/families that fit within the Inglis Housing Corporation criteria. Families will be selected specifically from the Inglis House waiting list to occupy these units. Units are eligible to Families/individuals at or below 60% of Area Median Income or Consistent with the income tiering requirements.

Unit Type	# of Units	Program Type	Income Limit
1bdrm	18	LIHTC	60.00%
1bdrm	25	PBV	50.00%
1bdrm	4	LIHTC	20.00%
2bdrm	2	LIHTC	60.00%
2bdrm	1	LIHTC	20.00%
<b>total</b>	<b>50</b>		

## LIHTC Waiting

## List

There are a total of fifty (50) low income housing tax credit units at Wynne Senior Residences, of those 49 units must be rented to households with incomes upon admission of up to 60% of the AMI. .

The LIHTC Waiting List shall be organized according to income tiers. As vacancies in the LIHTC



## Resident Selection Plan

Units occur, Owner shall lease vacant units to families on the LIHTC Waiting List, provided, however, that the family meets all eligibility and screening requirements, and the household's income is between 20% and 60%. However, should we find there are no eligible applicants with income between 20% and 60% we will select the next available person from the waiting list whose income is closest to the 50% or 60% income limit. In no event is the Owner required to keep any LIHTC unit vacant until an applicant in the required income tier is obtained.

### Income Eligibility Requirements and Preferences

Applicants for occupancy at Wynne Senior Residences will be required to meet the income eligibility guidelines of the LIHTC program and the following income levels:

1. 25 units shall be for households having annual incomes at or below 50% of the area median income (adjusted by family size)
2. 5 units shall be for households having annual incomes from 0% - 20% of area median income (adjusted by family size) with rents not exceeding 60% rent limits.
3. 20 units shall be for households having annual incomes from 51%-60% of area median income (adjusted by family size)
  - Area Median Income is determined periodically by the US department of Housing and Urban Development and is adjusted by family size.
4. Wynne Senior Residences provides preferences towards elderly homeless individuals.
  - a. The HUD definition of an elderly homeless person is an individual who lacks a fixed, regular and adequate nighttime residence or an individual who will imminently lose his or her primary nighttime residence;
  - b. An individual who is defined as homeless under other federal status who would not otherwise qualify as homeless under the above definition;
  - c. An individual who is fleeing or are attempting to flee, domestic violence, dating violence, sexual assault, stalking, or other dangerous or life-threatening conditions that relate to violence against the individual.



## Resident Selection Plan

### Privacy Policy

It is the policy of the owner/agent to guard the privacy of individuals conferred by the Federal Privacy Act of 1974 and to ensure the protection of such individuals' records maintained by the owner/agent. Neither the property owner nor its agents shall disclose any personal information contained in its records to any person or agency, other than HUD, its Contract Administrators or other federal/state entity or investor auditing entities, unless the individual about whom information is requested gives written consent to such disclosure.

This Privacy Policy in no way limits the owner/agent's ability to collect such information to determine eligibility, compute rent, or determine an applicant's suitability for tenancy.

### Verification

Management shall obtain verifications in compliance with requirements set forth by the LIHTC program as well as all local and state requirements. After the preliminary eligibility determination, no decision to accept or reject an application shall be made until information provided on the application form and during subsequent interviews has been collected and any necessary follow-up interviews have been performed. All information relative to the following items must be verified as described in these procedures:

#### INFORMATION TO BE VERIFIED

Information to be verified includes, but is not limited to:

- 1) Eligibility for Admission, such as
  - a) Income
  - b) Assets And Asset Income
  - c) Identification
  - d) Age
  - e) Household Composition
  - f) Social Security Numbers
  - g) Citizenship And/or Legal Status
  - h) Student Status
  - i) Current HUD Assistance
- 2) Compliance with Applicant Screening Guidelines, such as
  - a) Criminal History
  - b) Credit History
  - c) Rental/Residence History
- 3) The Need for an Accessible Unit

#### METHODS OF VERIFICATION

Verifications will be attempted in the following order:



## Resident Selection Plan

- 1) Third-party (as appropriate)
- 2) Review of applicable documents
- 3) In the absence of any of the above, notarized affidavits from the household member

Each file will be documented, when appropriate, to show that staff attempted to obtain third-party verification before relying on some less acceptable form of information.

### SOURCES OF INFORMATION

Sources of information may include, **but are not limited to:**

- 1) Any member of the applicant household
- 2) Present and former housing providers/landlords
- 3) Present and former employers
- 4) Banks
- 5) Insurance companies
- 6) Any Asset Manager
- 7) Family members
- 8) Any person or organization providing gifts/regular contributions to the household
- 9) Credit screening providers
- 10) Criminal screening providers
- 11) Eviction screening providers
- 12) Social workers/Parole officers
- 13) Court records
- 14) Drug treatment centers
- 15) Health providers
- 16) Physicians
- 17) Clergy
- 18) Schools/Institutes of higher education
- 19) Department of Homeland Security (DHS)
- 20) Department of Health and Human Services (HHS)
- 21) The Internal Revenue Service (IRS)
- 22) The Social Security Administration (SSA)
- 23) Medicare/Medicaid
- 24) Representative of the United States Armed Forces
- 25) Any federal/local benefit providers
- 26) Pharmacies
- 27) Local and non-local law enforcement
- 28) Automated criminal databases
- 29) Sexual offenders registries when available
- 30) The world wide web (internet)

The owner/agent will be the final judge of the credibility of any verification submitted by an applicant. If the owner/agent questions the validity of a document or the validity of information provided, it will be reviewed by management staff and a ruling about acceptability will be made. The owner/agent will continue to pursue credible documentation until it is obtained or the applicant is rejected for failing to produce it.





## Resident Selection Plan

### PERIOD FOR VERIFICATION

Only verified information that is less than 120 days old may be used for verification or recertification. Verified information not subject to change (such as a person's date of birth) will not be re-verified.

### CONSENT AND VERIFICATION FORMS

All adult members of a household must sign consent forms and, as necessary, verification documents, so that the owner/agent can verify eligibility and screening criteria. Consent and verification forms protect the rights and privacy of residents and applicants by allowing them to have control over any information collected about them. Each household member age 18 and older and each household head and spouse regardless of age must sign the following forms regardless of whether they report income:

### RESIDENT RELEASE AND CONSENT FORM

All adult members of an applicant or resident household must also sign individual verification forms authorizing the owner/agent to verify household income and other applicable eligibility factors (e.g., disability status).

### PROVISIONS FOR REFUSAL TO SIGN

If the applicant or any adult member of the applicant's household, does not sign and submit the consent forms as required in 24 CFR 5.230, the owner/agent must deny tenancy.

## Misrepresentation

Any information, provided by the applicant that verification subsequently proves to be untrue, may be used to disqualify the applicant because of misrepresentation or attempted fraud. The owner/agent will not take any action to reduce or deny assistance based on inconsistent information received during the verification process until the owner/agent has independently investigated the information.

The owner/agent considers false information about the following to be grounds for rejecting an applicant:

- 1) Identity
- 2) Social Security Numbers/Information
- 3) Income
- 4) Assets/Income from Assets
- 5) Household composition
- 6) Disability
- 7) Birth Date/Age
- 8) Citizenship, Naturalization, and/or Eligible Immigration Status
- 9) Eviction history
- 10) Criminal history
- 11) Sexual offender status
- 12) Eligibility for Preferences and Priorities



## Resident Selection Plan

- 13) Allowances
- 14) Current/Previous residence history
- 15) Current Housing Assistance
- 16) Status as a Student

Unintentional errors that do not cause preferential treatment will not be used as a basis to reject applicants.

### Applicant Screening Criteria

Screening is used to help ensure that households admitted to a property will abide by the terms of the lease, pay rent on time, take care of the property and unit, and allow all residents to peacefully enjoy their homes.

**Anyone who wishes to live on the property must be screened prior to moving in.** This includes, but is not limited to, live-in aides, security/police officers or additional household members wishing to move-in after the initial move-in. *Certain exceptions apply to children/minors.* The current screening guidelines in place at the time the new household member applies will be used to determine eligibility for admission.

Screening is performed in a manner that is reasonable, consistent, and complies with fair housing laws.

#### SCREENING FOR DRUG ABUSE AND OTHER CRIMINAL ACTIVITY

Pennrose Management Company has established standards that prohibit admission of:

- 1) Any household in which any member was evicted in the last seven years.
- 2) Any household member who is subject to any state lifetime sex offender registration requirement
- 3) Any household member if there is reasonable cause to believe that member's behavior, from abuse or pattern of abuse of alcohol, may interfere with the health, safety, and right to peaceful enjoyment by other residents. The screening standards must be based on behavior, not the condition of alcoholism or alcohol abuse

PMC will reject applications if any household member's criminal history includes one or more of the following:

- 1) Record of any conviction or adjudication, other than acquittal, of the following felonies by any household member
  - a. Murder
  - b. Arson
  - c. Felony assault
  - d. Kidnapping
  - e. Burglary
  - f. Treason
  - g. Crimes involving harm to children
  - h. Sexual offenses
  - i. Crimes involving explosives



## Resident Selection Plan

- j. Crimes involving terrorism
  - k. Crimes involving the manufacture, distribution or illegal use of illegal or controlled substances
  - l. Fraud
- 2) Record of any conviction or adjudication, other than acquittal, of all but the felonies listed above within 100 years of conviction or parole, whichever is later
  - 3) Record of three or more felony convictions or adjudications, other than acquittal
  - 4) Record of any conviction or adjudication, other than acquittal, which involved a misdemeanor offense within 15 years of conviction or parole; whichever is later
  - 5) Record of any conviction or adjudication, other than acquittal, which involved harm to a child
  - 6) Record of any conviction or adjudication, other than acquittal, which involved harm to an animal
  - 7) Record of any conviction or adjudication, other than acquittal, for any act covered under the Violence Against Women Act
  - 8) Sex Offender Registration: Applicant is or ever has been subject to registration under a state sex offender registration program

United States Code Title 8, subsection 1324(a)(1)(A) prohibits the harboring of illegal aliens. The provision of housing to illegal aliens is a fundamental component of harboring. All applicants will be required to provide proof of citizenship or legal immigration status.

If criminal screening indicates an unresolved criminal charge, the application will be suspended until the charge is resolved. At that time, the owner/agents current screening criteria will be applied.

If the owner/agent is unable to complete required criminal or sexual offender screening, the application will be rejected.

If criminal screening indicates that the applicant has an unacceptable criminal history, the owner/agent will reject the applicant in accordance with PMC's standards for applicant rejection.

***Management will run certain criminal background check, based on HUD recommendations, for all adult household members at each annual certification.***

### Criminal Screening Discoveries

Before rejecting the household, the owner/agent will compare the information provided by the applicant with the criminal history report. If the information conflicts, the owner/agent will:

- 1) Notify the household of the proposed action based on the information;
- 2) Provide information about how to obtain a copy of the criminal record;
- 3) Provide the applicant with an opportunity to dispute the accuracy and relevance of the information obtained from any law enforcement agency;
- 4) Allow the household the opportunity to remove the household member.

In this situation, applicants will have (10) calendar days to resolve the discrepancy. If the applicant fails to contact the owner/agent or indicates that he/she cannot provide documentation verify that the criminal screening information is not correct, the owner/agent will reject the application.



## Resident Selection Plan

If, after move-in, the owner/agent discovers that there was criminal history that would have resulted in rejection, the owner/agent will contact the resident to ascertain the accuracy of the criminal report. If the resident would have been rejected had the information been known at the time of the eligibility determination, the owner/agent will take steps to evict the household.

### Screening for Credit History

The owner/agent reviews each adult applicant's credit history. The owner/agent does not consider medical bills/expenses when reviewing credit history.

Credit history will be reviewed to determine if there is any debt owed to a prior landlord. Applicants owing prior landlords will be rejected unless:

- Such debt has been paid

PMC will also review utility payment history. If the applicant is unable to establish utilities in the new unit, the application will be rejected.

Other credit history that will be reviewed including but not limited to; the following discoveries will be reason for rejection:

- No outstanding balances in the last 60 months.
- No foreclosures in the last 24 months
- No utility debt in the last 60 months

If no credit history is available, the owner/agent will accept a single reference from a person who is not related to the applicant who is a licensed business owner, accredited professional or an employee of an accredited education facility. No additional inquiry will be made.

### Screening for Rental History

If any member of the applicant household has been evicted from any property owned or managed by Pennrose Management Company, for lease violations, that applicant household will be rejected.

PMC will review rental history with any landlord indicated in the past three years. Information will be gathered based on the application and information provided through automated eviction databases. If the applicant fails to identify one or more residences where he/she lived in the last three years, the applicant will be rejected.

If any member of the applicant household has been evicted from any property, for lease violations, within the last seven years, the application will be rejected.

PMC will contact the prior property owner/agent (as indicated above) and inquire about the following information:



## Resident Selection Plan

- 1) Adherence to the lease & community policies
- 2) Compliance with certification reporting requirements
- 3) Rental payment performance
- 4) Unit maintenance
- 5) Record of disturbing neighbors
- 6) Complaints

If information obtained is negative the applicant will be rejected. Negative responses include but are not limited to:

- 1) Failure to comply with the lease
- 2) Providing false information
- 3) No lease violation records with in the last 24 months.
- 4) Applicant has less than 2 eviction notices in the last 24 months.
- 5) No verified evictions within in the last 84 months.
- 6) No late pays or NSF's in the last 12 months.

If no rental history is available, the owner/agent will accept a single reference from a person who is not related to the applicant who is a licensed business owner, accredited professional or an employee of an accredited education facility. No additional inquiry will be made.

### Rejecting Ineligible or Unqualified Applicants

PMC reserves the right to reject applicants for admission based on the following:

- 1) No unit of the appropriate size exists on the property
- 2) Any non-exempt member of the household fails to provide a Social Security Number or adequate documentation to verify the Social Security Number.
- 3) Any member of the household fails to meet the applicant screening requirements – the owner/agent will consider the application again if the person who failed screening criteria is removed
- 4) Any member of the household fails to sign appropriate verification documents
- 5) Misrepresentation
- 6) Fraud
- 7) Any member of the household fails to respond to management inquiries for additional information during the application process
- 8) Any member of the household fails to respond to management inquiries while on the waiting list
- 9) Any member of the household fails to provide changed household information to the management company as indicated
- 10) The owner/agent is unable to contact the applicant via US Mail (letters undeliverable or returned) and/or by phone (number disconnected or changed)
- 11) Any member of the household has a record of eviction, for lease violations, from any property managed by Penrose Management Company.
- 12) Any member of the household has a record of eviction, for lease violations, from any property within the last seven years
- 13) There is record of outstanding or overdue payments to a previous landlord
- 14) There is record of outstanding or overdue payments to utility providers



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- 15) Any member of the household refused to allow treatment of unit contents, at the cost of the owner/agent, when there is history of the presence of bed bugs, fleas, or other parasites
- 16) The household is unable to establish utilities in the new unit
- 17) The household is unable to pay the security deposit required
- 18) The household refuses two or more unit offers

### Grievance Procedure

#### Rejection Notices

PMC will promptly notify the applicant, in writing, of the denial of admission or assistance. The result of the eligibility determination will be sent to the head of household, as indicated on the application, via First Class Mail. The rejection notice will include:

- 1) The specifically stated reason(s) for the rejection
- 2) The applicant's right to respond to the owner/agent in writing or request a meeting within fourteen (14) calendar days to dispute the rejection
- 3) That persons with disabilities have the right to request reasonable accommodations to participate in the informal hearing process

Information about the results of the eligibility determination will NOT be provided over the phone or via email.

#### Meetings with Applicants to Discuss Rejection Notices

Rejected applicants may request a meeting to discuss/appeal the denial. PMC will grant a reasonable accommodation, if there is the presence of a disability, to allow the applicant to participate in the appeal. Common reasons to appeal denial include:

- You believe the decision has been made in error
- You believe there are extenuating circumstances that should be considered
- You or a member of your household is a victim of abuse covered by the Violence Against Women Act and you feel your status as a victim contributes to the decision to reject – You will be required to complete and submit HUD Form 91066 to certify status as a victim
- You or a member of your household is a person with a disability, and you believe a reasonable accommodation would allow us to continue processing the application
- Your household was rejected because the application includes someone who is a registered sex offender and you wish to remove that household member

If an appeal meeting is requested within 14 calendar days, a person who was not involved in the initial decision to reject the application will conduct a meeting with the applicant to discuss the rejection. The applicant may bring a representative of the applicant's choice to the appeal meeting. Paterson Housing Authority may have a staff member participate in the hearing process.

If an applicant is clearly eligible and passes the screening guidelines, admission shall be authorized. Likewise, if the applicant is not eligible, or does not meet the screening requirements, rejection shall be



## Resident Selection Plan

authorized. PMC will advise the applicant, in writing, of the final decision within five (5) business days of the meeting.

### Offering an Apartment

When a unit becomes available and eligibility is determined, available units will be offered:

- In writing
- Over the phone
- By email

If PMC is unable to contact the household within five (5) business days from the date of the letter, the offer will be cancelled and the apartment will be offered to the next applicant based on the selection criteria described above. Failure to accept the unit will be considered a refusal of the unit offer. (See Right to Refusal policies.)

#### OFFERING ACCESSIBLE UNITS

Units that have been made accessible in accordance with the Universal Federal Accessibility Standards will be offered to applicant households with disabled members first. In some cases, PMC may implement marketing effort to ensure that disabled households occupy accessible units. An accessible unit will be offered as follows:

- 1) Units with communication accessible features will be offered to households with a verified need for communication accessible units first
- 2) Units with mobility accessible features will be offered to households with a verified need for mobility accessible units first

In the case where the members of the household who required the special features of the accessible unit no longer reside in the unit, and where the lease permits, the owner will require the remaining members of the household to move to a unit without accessibility features when such a unit of the appropriate size becomes available.

If there is no household on the waiting list that has requested an accessible unit, the unit will then be offered to the next applicant household on the waiting list.

Before the applicant can accept that accessible unit, all adult members of the applicant household must sign an agreement that includes a requirement to move, at the household's expense, to the first available non-accessible unit that meets the household's occupancy requirements as described in this plan.

The resident household will not be required to move if:

- 1) No unit that meets the household's occupancy requirements is available
- 2) There is no applicant household on the waiting list requesting an accessible unit



## Resident Selection Plan

### OFFERING UNITS TO APPLICANTS WITH DISABLED HOUSEHOLD MEMBERS

PMC will not skip over a household that has reached the top of the waiting list and has indicated a need for certain unit features because of a disability. The household will be given the opportunity to benefit from the program and decide for itself, in compliance with the Fair Housing Act and Section 504, whether a unit meets the needs of the disabled household member. The household may accept the unit and request some modification to the unit as a reasonable accommodation.

### Applicant/Resident Selection Priorities

When a unit is available, that unit will be offered in the following order:

**Accessible Apartments** will be offered in the following order:

- 1) The next household on the waiting list that currently resides on the property and needs a different accessible unit based on a change in household size or composition
- 2) The next household on the waiting list that currently resides on the property in an accessible unit that needs a different accessible unit based on a verified medical need
- 3) The next household on the waiting list that currently resides on the property and needs a different unit based on a verified need for an accessible unit
- 4) The next household on the waiting list that currently resides in the community that includes an adult household member requesting a separate unit and that includes a member that needs the features of that accessible unit.
- 5) The next applicant household on the waiting list that does not currently reside in the community that requires the features of an accessible unit
- 6) The next household on the waiting list that currently resides in the community that includes an adult household member requesting a separate unit when no residents or applicants require the features of an accessible unit
- 7) The next applicant household on the waiting list that does not currently reside in the community when no residents or applicants require the features of an accessible unit

**Non-accessible Apartments** will be offered in the following order:

- 1) The next household on the waiting list that currently resides on the property and needs a different size unit based on a change in household size and/or composition
- 2) The next household on the waiting list that currently resides on the property and needs a different unit based on a verified medical need for a different unit
- 3) The next household on the waiting list that currently resides on the property that no longer requires the accessibility features of the unit in which they currently living
- 4) The next household on the waiting list that currently resides in the community that includes an adult household member requesting a separate unit
- 5) The next applicant household on the waiting list on the waiting list that does not currently reside in the community

### Right to Refusal





## Resident Selection Plan

The Right to Refusal Policy applies to applicant households and existing residents who have submitted a Unit Transfer Request. Residents requesting unit transfer and applicants will be offered available units based on the information included in this resident selection plan.

Each household will be offered the opportunity to accept an offered apartment two (2) times. If a resident/applicant does not wish to accept an offered apartment, they have the right to refuse the offer. Residents/applicants must notify PMC of their intent to refuse the unit offer by using one or more of the following methods:

- In writing (delivered by fax, mail or other means)
- By email
- Over the phone

*Note: If the refusal is made over the phone, contact must be made with a member of the management staff. Leaving a message is not adequate.*

The first time an applicant or resident refuses a unit, the unit will be offered to the next qualified household based on the criteria described above. The applicant or resident will retain the same place on the waiting list. The second time an applicant or resident refuses an offered unit, the household will be removed from the waiting list. Right to refusal policies will be modified in two cases:

- 1) If a disabled applicant or resident is at the top of the waiting list, they will be offered units as they become available regardless of whether they include accessible features. A disabled household has the right to refuse an unlimited number of non-accessible units or units that do not meet specific accessibility requirements.
- 2) If an applicant or resident household with no disabled members is at the top of the waiting list, and there are no disabled households on the waiting list, that household may be offered an accessible unit. An applicant household with no disabled household members has the right to refuse an unlimited number of accessible units or units that do not meet their needs.

### Unit Transfer Policies

PMC will accept applications for transfer based on the following:

- 1) There is a need for a unit transfer because of a change in household size and/or composition
- 2) There is a need for a unit transfer based on the verified need for an accessible unit
- 3) There is a verified medical need for a different unit.



## Resident Selection Plan

- 4) There is a need for a unit transfer of a household that does not require the accessibility features of a unit in which they are living
- 5) If two or more adult household members reside in one unit and one or more adults choose to apply for a separate unit, they will be required to submit an application. The application will be reviewed for eligibility as described in this plan and if approved, that applicant will receive preference over other non-residents

Existing residents must complete a Unit Transfer Request. The Unit Transfer Request must be completed and signed by the head of household and all adult household members who wish to move. PMC will accept the Unit Transfer Request in an equally effective format, as a reasonable accommodation, if there is the presence of a disability. Factors concerning approval of transfers are as follows:

1. A household that has given notice to move need not be transferred
2. A household whose household size/composition has not changed and the household currently meets the unit size standards for their current apartment will not be transferred unless there is:
  - a) A verified medical need for a different unit
  - b) A verified need for an accessible unit
  - c) There is a need for a unit transfer of a household that does not require the accessibility features of a unit in which they are living to accommodate a disabled resident/applicant on the waiting list.
3. The household must have been in the current unit for at least one year unless there is:
  - a) A verified medical need for a different unit
  - b) A verified need for an accessible unit
  - c) There is a need for a unit transfer of a household that does not require the accessibility features of a unit in which they are living to accommodate a disabled resident/applicant on the waiting list.
4. A household living in an apartment too large for its needs will not be required to move if there are no applicants waiting for the bedroom size to be vacated by the transfer. An appropriate sized unit will be available before the resident household is required to move.

### Security Deposit Requirements

PMC must collect a security deposit at the time of the initial lease execution. PMC will comply with all applicable state and local laws governing the security deposit.

The resident is expected to pay the security deposit from his/her own resources and/or other public or private sources. An applicant will be rejected if he/she does not have sufficient funds to pay the deposit.

### Security Deposits & Unit Transfers

When a resident transfers to a new unit with all other household members, PMC will charge a new security deposit and refund the security deposit for the old unit less any outstanding amounts for rent, fees or damages. If the household splits and one or more residents remain in the original unit, the original security deposit will remain with the original unit and a new security deposit will be collected for the new unit.



## Changes in Household Composition

### ADDING HOUSEHOLD MEMBERS AFTER INITIAL OCCUPANCY

PMC must approve any new household member **before** he/she moves in to the unit.

Eligibility criteria, screening criteria and compliance with occupancy standards will be reviewed before the new household member is approved or denied.

The proposed new adult household member will be considered an applicant and must participate in the eligibility determination and screening processes described in the current resident selection plan

This policy applies to live-in aides as well. Screening criteria will also be applied to live-in aides, **except for the criterion regarding credit performance or the ability to pay rent on time** because live-in aides are not responsible for rental payments. However, live in aides must meet other screening criteria established by PMC. Income and/or allowances received by live-in aides will not be considered.

## Apartment Inspections

All apartments must undergo periodic inspection conducted by the on-site management team, and or State representatives/agents. These inspections include not only interior but also exterior inspections. Residents have the right to be present, and are, in fact encouraged, to be present during unit inspection.

**The move-in inspection** is an opportunity to familiarize the new resident with the property and the unit, as well as to document its current condition. By performing move-in inspections, the owner/agent and residents are assured that the unit is in livable condition and is free of damages. A move-in inspection gives the owner/agent an opportunity to familiarize residents with the operation of appliances and equipment in the unit.

**The move-out inspection** is conducted when a household vacates a unit. The owner/agent will list the damages on the Unit Inspection Form and compare it with the Unit Inspection Form completed at move-in to determine if there is any damage or excessive wear-and-tear.

In addition, PMC will perform **unit inspections on at least an annual basis** to determine whether the appliances and equipment in the unit are functioning properly and to assess whether a component needs to be repaired or replaced. This is also an opportunity to determine any damage to the unit and, if so, make the necessary repairs. At this time, residents may be charged for damages to the unit so long as those damages are not the result of normal wear-and-tear.

## Changes to the Resident Selection Plan

Applicants will be notified in writing when the resident selection plan undergoes significant change or when preferences are added or removed. At that time, applicants will be:

- 1) Given an opportunity to review the new plan
- 2) Notified of changes to preferences



## Resident Selection Plan

### 3) Asked if they wish to remain on the waiting list

If the applicant household does not respond, that household will be deemed ineligible and removed from the waiting list.

The current resident selection plan, in place at the time of final eligibility determination, will be used to make a final decision to approve or reject the application.

## Appendix A – Request for Reasonable Accommodation or Modification

The owner/agent is committed to complying with the Fair Housing Act and Section 504 of the Rehabilitation Act by ensuring that its policies and practices do not deny individuals with disabilities the opportunity to participate in, or benefit from, nor otherwise discriminate against individuals with disabilities in connection with the operation of housing services or programs solely on the basis of such disabilities.

If an individual with a disability requests an accommodation or modification, the owner/agent will fulfill these requests, unless doing so would result in a fundamental alteration in the nature of the program or create an undue financial and administrative burden. In such a case, if possible, the owner/agent will offer an alternative solution that would not result in a financial or administrative burden.



## Resident Selection Plan

- (1) The owner/agent informs all residents that, at any time, the resident or a person acting on behalf of the resident may make a request for reasonable accommodation or modification for an individual with a disability.
- (2) At the time of application, all applicants are provided with a copy of the Reasonable Accommodation - Modification Policy. This is provided in writing as part of the Application Package or, upon the applicant's request, the Policy will be provided in an equally effective format.
- (3) All applicants/residents are provided with a Reasonable Accommodation/Modification Request Form when requesting a reasonable accommodation or modification. The request will be accepted in an equally effective format, as a reasonable accommodation, if there is the presence of a disability. A resident or applicant may submit the request in writing, orally, or use another equally effective means of communication to request an accommodation or modification.
- (4) Residents and applicants may contact the management office located within their property for information about requests.
- (5) The owner/agent will provide an initial reply to requests as quickly as possible, but no more than ten (10) business days from the receipt of the request unless the owner/agent explains the delay. Response may include but is not limited to:
  - i. Request Approval
  - ii. Request Denial
  - iii. Request for Additional Information or Verification of Need
- (6) The owner/agent will consent to or deny the request as quickly as possible. Unless the owner/agent explains the delay, the applicant/resident will be notified of the decision to consent or deny within no more than thirty (30) calendar days after receiving all necessary information and documentation from the resident and/or appropriate verification sources. All decisions to grant or deny reasonable accommodations will be communicated in writing or, if required/requested, in an alternative format. Exceptions to the thirty (30) day period for notification of the owner/agent's decision on the request will be provided to the resident setting forth the reasons for the delay.
- (7) If the request for reasonable accommodation or modification is denied, the requestor has the right to appeal the decision within ten (10) business days of the date of the written notification of denial. The appeal meeting will be conducted by a person who was not originally involved in the decision to deny.





**Exhibit "H"**  
**Grievance Procedure Of Pennrose Management Company**

# GRIEVANCE PROCEDURE

## Section 1: Purpose & Scope

This Grievance Procedure sets forth the requirements, standards and criteria established to assure the residents of Pennrose Management Company an opportunity for a hearing, if they dispute, within reasonable time, any action or failure to act on the part of Pennrose Management Company, in its capacity as Management Agent for Alexander Hamilton Phase II, or any successor Management Agent, involving the residents' leases or Pennrose Management Company regulations which adversely affect the individual resident's rights, duties, welfare or status. In this document, references to Pennrose Management Company may be read as incorporating the Owner and Agent thereof.

## Section 2: Applicability (24 CFR Section 966.51)

- A. This procedure applies to all grievances between individual residents and Pennrose Management Company, as defined in Section 4-A below.
- B. This Grievance Procedure does not apply to:
  - 1. Disputes between residents in which Pennrose Management Company is not involved.
  - 2. Any changes in Pennrose Management Company policies and procedures to the extent such changes do not adversely affect a resident's rights, duties, welfare or status. This procedure is not intended as a forum for initiating or negotiating policy changes between a resident or group of residents and Pennrose Management Company.
  - 3. Class grievances.
  - 4. Termination of residency or eviction that involves:
    - a. Any criminal activity that threatens the health, safety or right to peaceful enjoyment of the premises of other residents or employees at Pennrose Management Company; or
    - b. Any drug related criminal activity on or near the premises.

## Section 3: Requirements (24 CFR Sec 966.52)

- A. This Grievance Procedure is incorporated by reference in all resident dwelling leases and will be furnished to each resident and all resident organizations.



- B. Any changes proposed in this Grievance Procedure must provide for at least thirty (30) days notice to residents and resident organizations, setting forth the proposed changes and providing an opportunity to present written comments. Management shall consider comments submitted before any revisions are made to the Grievance Procedure.

**Section 4: Definitions (24 CFR Sec 966.53)**

For the purpose of this Grievance Procedure, the following definitions apply:

- A. Grievance – Any disagreement which a resident may have with respect to Pennrose Management Company action or failure to act in accordance with the individual resident’s lease or Pennrose Management Company regulations, which adversely affects the individual resident’s rights, duties, welfare or status.
- B. Complainant – Any resident whose grievance is presented to Pennrose Management Company in accordance with Sections 5 and 6 of this procedure.
- C. Elements of Due Process – Legal proceedings in a State or local court carried out in accordance with established rules. Any eviction or termination of residency proceeding requires:
1. Adequate notice to the resident of the grounds for terminating his or her lease and for eviction;
  2. The right of the resident to be represented by legal counsel;
  3. The opportunity for the resident to disagree with the evidence presented by Pennrose Management Company, including the right to confront and cross-examine witnesses and to present any affirmative legal or fair defense, which the resident may have; and
  4. A decision on the merits.
- D. Hearing Officer – A person selected to hear grievances and make a decision.
- E. Resident – Shall mean the adult person(s) other than a live-in aide who:
1. Resides in the unit and who executed the lease with Pennrose Management Company as lessee of the dwelling unit; or
  2. If no such person resides in the unit, an adult who currently resides in the unit who would qualify as the remaining member of the resident family.
- F. Resident Organization – includes Resident Councils and Resident Management Corporations.

- G. Informal Settlement – Informal discussion between the complainant and Pennrose Management Company, which attempts to resolve the grievance before going to a formal grievance hearing.
- H. Summary of Discussion – Result of informal settlement discussion giving detailed information, in writing, of the major points discussed in the informal hearing and Pennrose Management Company decision on the complaint.
- I. Escrow – Money held by a third person as a good faith promise until a determination is made on what to do with the money.
- J. Waiver – To release a right or claim.
- K. Trial De Novo – The right to a new trial.

**Section 5: Notification of Adverse Action (24 CFR Sec 966.4)**

- A. Resident must receive written notification of any adverse action, outlining the grounds for such action, and where applicable advising the resident of the right to request a hearing under this Grievance Procedure.

**Section 6: Informal Settlement of Grievance (24 CFR Sec 966.54)**

- A. Before a complainant can request a Hearing by a Hearing Officer, the grievance must first be submitted for Informal Settlement.
- B. If the complainant can show good cause why he or she has failed to follow the procedure for Informal Settlement to the Hearing Officer, the Hearing Officer may waive the Informal Settlement.
- C. Any grievance shall be personally presented, either orally or in writing, within ten (10) business days after the grievable event to the Pennrose Management Company Management Office so that the grievances may be discussed informally and settled without a Hearing. This Informal Settlement must be held within ten (10) business days of receipt of the grievance.
- D. A Summary of Discussion shall be prepared within five (5) business days of the Informal Settlement by Pennrose Management Company specifying:
  - 1. Names of participants.
  - 2. Date of meeting.
  - 3. Nature of proposed disposition of the complainant.
  - 4. Specific reason for proposed disposition of the complainant.
  - 5. Procedures by which a Hearing may be obtained, if the complainant is not satisfied.

6. That the complainant has five (5) business days from the date of the Summary of Disposition to request a formal Hearing.

E. Copies of the Summary of Discussion will be distributed as follows:

1. One copy will be sent to the complainant by mail or hand delivered.
2. One copy of the Summary of Discussion will be kept in the resident file.

**Section 7: Procedure to Obtain a Hearing (24 CFR 966.55)**

- A. Pennrose Management Company's disposition of the grievance under Section 5, as stated in the Summary of Discussion, becomes final and effective at the close of business on the fifth (5th) business day following the date of the Summary of Discussion.
- B. The failure to request a Hearing does not waive the complainant's right to contest Pennrose Management Company's decision in an appropriate judicial proceeding.
- C. If the complainant can show good cause why he or she failed to follow the procedure in Section 5 of this procedure, the Hearing Officer may waive said requirement of compliance with informal settlement.

**Section 8: Failure to Request a Hearing (24 CFR 966.55)**

If the complainant does not request a Hearing within five (5) business days following the date of the Summary of Discussion:

- A. Pennrose Management Company's disposition of the grievance under Section 5, as stated in the Summary of Discussion becomes final and effective at the close of business on the fifth (5<sup>th</sup>) business day following the date of the Summary of Discussion.
- B. The failure to request a Hearing does not waive the complainant's right to contest Pennrose Management Company's decision in an appropriate judicial proceeding.

**Section 9: Grievance Involving Amount of Rent – Escrow Account (24 CFR 966.55)**

Before a Hearing can be scheduled for a grievance involving the amount of rent, as defined in the Lease, the complainant must:

- A. Pay Pennrose Management Company an amount equal to the amount of rent that was due and payable on the first of the month preceding the month in which the grievance occurred; and
- B. Deposit this same amount of rent due in an Escrow Account every month until the complaint is resolved by the decision of the Hearing Officer.

If the complainant fails to comply with Section 8, A and B, above, the grievance process will be terminated. Failure to follow Section 8, A and B, above, however, does not waive any of the complainant's rights to contest Pennrose Management Company's disposition of the grievance in an appropriate judicial proceeding.

Pennrose Management Company may waive the requirements described in this section in extenuating circumstances.

#### **Section 10: Selection of a Hearing Officer (24 CFR 966.55)**

If the complainant complies with the requirements, the Hearing Officer will promptly schedule a Grievance Hearing. The Hearing Officer will attempt to schedule the Grievance Hearing for a time and place reasonable convenient to both the complainant and Management. A written notification, specifying the time, place and procedures governing the hearing shall be sent to the complainant by mail or hand delivered.

#### **Section 11: Schedule of Hearings (24 CFR 966.55)**

If the complainant has met the informal hearing requirements, properly requested a Formal Hearing and made any necessary rental payments to Pennrose Management Company and to an Escrow Account (when applicable), then the following will take place:

- A. The Hearing Officer will promptly schedule a hearing.
- B. The hearing will be scheduled for a time and place reasonably convenient to both the complainant and Management of Pennrose Management Company.
- C. Written notification will be delivered to the complainant and appropriate Pennrose Management Company officials, by mail, or hand-delivered.
- D. The written notification will specify:
  - 1. Time of Hearing.
  - 2. Place of Hearing
  - 3. Procedures governing the Hearing
- E. Requests for a postponement of the Hearing must be submitted, in writing, to the Hearing Officer. Only one (1) postponement of the Hearing will be allowed.

#### **Section 12: Failure to Appear at the Hearing (24 CFR 966.55)**

- A. If either party fails to appear at the Hearing, the Hearing Officer will determine that the non-appearing party has waived the right to a Hearing.
- B. The complainant and Pennrose Management Company will both be notified, in writing, of this determination by the Hearing Officer.

- C. Failure of the complainant to appear at the Hearing and a determination that he or she has waived the right to a Hearing does not waive the complainant's right to argue the case in an appropriate judicial proceeding.

**Section 13: Procedure Governing Hearing (24 CFR 966.55)**

- A. The Hearing shall be held before the Hearing Officer.
- B. The complainant shall be afforded a fair Hearing, which shall include:
  - 1. The opportunity to examine, before the Hearing, any Pennrose Management Company documents, including records and regulations that are directly relevant to the Hearing.
  - 2. The right to be represented by counsel or other person chosen as his or her representative, and to have this person make statements on the complainant's behalf.
  - 3. The right to a private hearing, unless the complainant requests a public Hearing.
  - 4. The right to present evidence and arguments in support of his or her complaint, to object to irrelevant evidence and request that such evidence be excluded, and to confront and cross-examine all witnesses on whose testimony or information Pennrose Management Company relies.
  - 5. A decision based solely and exclusively upon the facts presented at the Hearing and all applicable state and federal statutes and regulations.
- C. The Hearing Officer may render a decision without holding the Hearing if the Hearing Officer determines that the issue has been previously decided in another proceeding.
- D. At the Hearing, the complainant must first show that he or she is entitled to the relief sought, after which Pennrose Management Company must justify the action or failure to act as cited in the complaint.
- E. The Hearing Officer shall conduct the Hearing informally, and oral or documentary evidence pertinent to the facts and issues raised in the complaint may be received without regard to admissibility under the rules of evidence applicable in judicial proceedings.
- F. The Hearing Officer shall require Pennrose Management Company, the complainant, counsel and other participants or spectators to conduct themselves in an orderly fashion.

- G. Failure to comply with the directions of the Hearing Officer to obtain order, may result in removal of the disorderly person from the proceedings, termination of the Hearing or a decision adverse to the interests of the disorderly person and the granting or denial of the relief sought, as appropriate.
- H. The complainant or Pennrose Management Company may arrange in advance, and at the expense of the party making the arrangement, for a transcript of the Hearing. Any interested person may purchase a copy of the transcript.
- I. Accommodation of persons with disabilities:
  - 1. Pennrose Management Company will ensure that reasonable accommodation for persons with disabilities is provided so that participation in any Hearing is possible. Reasonable accommodation may include qualified sign language interpreters, readers, accessible locations or attendants.
  - 2. If the complainant is visually impaired, any notice that is required under this Grievance Procedure must be in an accessible format.

**Section 14: Decision of Hearing Officer (24 CFR Sec 966.59)**

- A. The Hearing Officer will prepare a written decision, together with a brief statement of the reasons, within ten (10) business days after the Hearing.
- B. Copies of the decision will be sent to the complainant and Pennrose Management Company at the same time. Pennrose Management Company shall retain a copy of the decision in the resident's file.
- C. Final Decision

A copy of the decision, with all names and identifying references deleted, will also be maintained on file by Pennrose Management Company, which will take all actions, or refrain from any actions, necessary to carry out the decision.

A decision by the Hearing Officer of the Management Agent/ Owner in favor of Pennrose Management Company, or which denies the relief requested by the complainant in whole or in part, is final and not subject to appeal utilizing this Grievance Procedure; however, this does not waive or affect any rights the complainant may have to a trial de nova or judicial review in any judicial proceedings, which may be filed in the future.

**Section 15: Due Process Determination**

- A. The term "due process determination" means a determination by HUD that law of the jurisdiction requires that the resident must be given the opportunity for a hearing in court, which provides the basic elements of due process before eviction from the dwelling unit.

- B. Since HUD has issued a due process determination, federal law provides that Pennrose Management Company may exclude from the administrative Grievance Procedure, any grievance concerning a termination of residency or eviction that involves:
- i. Summary evictions in the Maryland District Court, or
  - ii. An action for ejectment pursuant to Section 4-402 of the Maryland Courts of Judicial Procedure Code and Subtitle T of Chapter 1100 of the Maryland Rules Annotated.
- C. In the event of a grievance concerning a termination of residency or eviction that involves a) any criminal activity that threatens the health, safety or right to peaceful enjoyment of the premises of other residents or employees at Pennrose Management Company; or b) any drug related criminal activity on or near the premises, the aggrieved party shall have 24 hours after the event to file a grievance, and expedited grievance proceedings shall be applied.
- D. In addition, Pennrose Management Company may evict the occupants of the dwelling unit through the judicial eviction procedures, which are the subject of the determination.
- E. A decision by the hearing officer in favor of Management or which denies the relief requested by the complainant in whole or in part shall not constitute a waiver of, nor affect in any manner whatever, any rights the complainant may have to a trial de novo or judicial review in any judicial proceedings, which may thereafter be brought in the matter.

#### **Section 16: Miscellaneous Provisions**

- A. Headings – Any headings preceding the text of the paragraphs or sub-paragraphs are solely for reference purposes, and shall not constitute a part of the Grievance Procedure, nor shall they affect its meaning, construction or effect.
- B. Severability – If any term, condition, clause or provision of this Grievance Procedure shall be determined or declared to be void or invalid, then only that term, condition, clause or provision shall be stricken from this Grievance Procedure, and in all other respects, this Grievance Procedure shall be valid and continue in full force, effect and operation.





**Exhibit "F"**  
**Preventive Maintenance Plan**

(The attached is a representation of portions of a Preventive Maintenance Plan. The actual Preventive Maintenance Plan will be prepared once construction is complete and all building systems are in place.)

# Pennrose Management Company

## Preventative Maintenance

### 1. Overview

1.1 It is the job of the Maintenance Department to maintain the buildings, equipment, and the grounds, and to prevent undue wear and deterioration. A professional and organized maintenance department must have and maintain an aggressive preventative maintenance program that includes daily, weekly, monthly, and annual maintenance inspections/repairs. A successful pro-active PM program will provide you with:

- 1.1.1 Less service requests
- 1.1.2 Less equipment failure
- 1.1.3 Better curb appeal
- 1.1.4 Satisfied Residents
- 1.1.5 Increased longevity of equipment
- 1.1.6 Valuable information for budgeting each year
- 1.1.7 An opportunity to identify risks before they become accidents

### 2. Policy

2.1 Every property is different and has unique equipment and mechanical systems. The first step is to inspect the entire building and grounds and identify all mechanical equipment and inventory that requires ongoing periodic service. The second step is to identify what the maintenance team will complete in-house vs. outsourcing to a contractor. After this is completed every community must have the following:

- 2.1.1 A system for documenting service, repairs, and completion dates.
- 2.1.2 Standards for frequency of inspection or service for each system and piece of equipment. Please use the manufacturer recommendations for all equipment and mechanical systems, and adhere to any local, state, or federal regulations that may apply. Accomplish more by following existing schedules already in place on the property (i.e. have maintenance person do A/C filter changes with pest control, etc.)
- 2.1.3 Assignment of responsibility and performing inspection or service. Consider staff size, skill and ability when assigning responsibility. Some equipment requires specialized service and can only be performed by an experienced, licensed contractor (i.e., fire equipment and elevators).
- 2.1.4 Order any supplies needed beforehand prior to the scheduled PM date.
- 2.1.5 Complete documentation of all service and repairs. Compile all inspection results and all repairs in your Preventive Maintenance Notebook and post on your local software tracking program.

### 3. Annual Calendar

3.1 Prior to any preventative maintenance, the team must first establish a master calendar that will ensure all of the above repairs are completed over the course of a year. All regular maintenance functions can be entered in the calendar including frequency of service, and the date scheduled. When a master calendar is used, preventative maintenance tasks can be scheduled in logical sequence. This promotes proper equipment care and efficient work scheduling. We suggest you track your scheduling in Microsoft Outlook and set reminders for the PM's in your site property management software program.

#### 4. Monthly PM Schedule

4.1 The monthly PM schedule will list all of the general PM's from the Master annual calendar on a monthly basis for easy tracking and record keeping. This schedule / log serves as a record of the preventative and routine maintenance and inspections performed in each area. All mechanical and structural systems need to be inspected and serviced regularly in order to maintain a safe, clean, trouble-free home for our residents. Although each property has specific apartment inspection needs (and a log must be customized to suit each), the most common items in need of service or inspection are listed below along with frequency of service. Some items may not be applicable in each department if the particular piece of equipment listed is not present. Each month the Maintenance Superintendent will complete the work or assign it to another maintenance technician.

#### 5. PM Descriptions and Categories

5.1 Most Preventive Maintenance Schedules are broken down into three basic areas: Apartment and Interior/Exterior Common Area PM's, Fire System PM's, and Major Equipment PM's.

##### 5.2 Apartment and Interior/Exterior Common Area PM's

5.2.1 Air Handler (Monthly)

5.2.2 Balcony Rails (2x/yr.) Checked for integrity.

5.2.3 Blower motors (1x/yr.) Cleaned and lubricated.

5.2.4 Carpeting/common area (Daily)

5.2.5 Caulking (2x/yr.)

5.2.6 Common area touch up painting (Monthly)

5.2.7 Common area VCT wax (1x/yr)

5.2.8 Common area VCT tile buffing (Monthly)

5.2.9 Common area VCT tile mop (Daily)

5.2.10 Culverts – retention basin (4x/yr)

5.2.11 Curbs and driveways (Monthly)

5.2.12 Door locks (1x/yr.) Checked for wear, proper operation, and integrity. Lubricate as needed

5.2.13 Electric (1x/yr.) Checked for G.F.I. circuits for proper operation. Breaker panel properly labeled.

5.2.14 Evaporator / condenser coils (1x/yr.) Inspected and cleaned as necessary. At this time, the condensate pan should also be checked for integrity and proper drainage. A condensate treatment can be added to help prevent condensate problems.

5.2.15 Extermination (Monthly)

5.2.16 Fire extinguishers (1x/yr.) Checked for accessibility and proper charge.

5.2.17 Fireplace and chimneys (1x/yr.) Inspected and cleaned as needed. Check for cracked refractories and proper flu ventilation. (Inspections and cleaning can be done by contractor or knowledgeable staff.)

5.2.18 Fire Stops (2x/yr.)

5.2.19 Furnace filter change (4x/yr.) 2x minimum. Dependant on staff availability.

5.2.20 Furnaces (1x/yr.) Checked for integrity and proper combustion. Remove burners and clean.

5.2.21 Furnace flues (1x/yr.) Checked for proper ventilation and integrity.

5.2.22 Furnace heat exchanger (1x/yr. after first 5 years.) Exchanger is to be checked for integrity. Zero tolerance is to be maintained. Any sign of carbon monoxide transfer will require immediate replacement of the heat exchanger or furnace.

5.2.23 Hot water heaters (2x/yr.) checked for proper operation and burners cleaned, corrosion, and leaks.

5.2.24 Landscaping and grounds (Daily)

5.2.25 Lights/interior and exterior (Weekly)

5.2.26 Plumbing fixtures (4x/yr.) Checked for leaks and repaired as needed. Leaking faucets and toilets will directly affect energy and water consumption cost.

5.2.27 Refrigerator (1x/yr) vacuum clean compressor fins/coil.

5.2.28 Smoke detectors (2x/yr.) Checked with synthetic smoke for proper operation. Clean if needed. Replace batteries if applicable.

5.2.29 Thermostat control (weekly).

**5.3 FIRE SYSTEMS AND EQUIPMENT INSPECTON/MAINTENANCE LOG:** For the safety of our residents, personnel and buildings, it is essential to maintain and service all fire systems, monitoring systems and equipment in compliance with all local and state fire codes. Most fire systems and equipment are required to be inspected and serviced by a licensed contractor annually. Check with your local fire marshal's office for all applicable codes. Have your local fire department visit your property for a walkthrough inspection. This will give them a chance to become familiar with the layout of the property and its systems.

5.3.1 Depending on the type of property and local codes, a Knox box may be required on your building to give the local fire department access to building keys in an emergency. The following must be included in the property's fire systems log. (Note: Frequency may vary depending on local codes).

5.3.2 Alarms and strobes (1x/yr.) Checked for proper operation and decibel rating.

5.3.3 Annunciator panels (monthly) Checked for proper operation and battery backup.

5.3.4 Dry sprinkler system (1x/yr.) Checked for water accumulation (open drum drips weekly when cold). Check for proper trip point and flow response time. Exercise and lubricate accelerator pumps. Check air compressor operation pressure. Lubricate as needed.

5.3.5 DVR and Camera Equipment / hard drive, cameras and electronic key card systems (Daily)

5.3.6 Emergency lighting (monthly) Checked for trip point. Replace bulb or batteries if needed.

5.3.7 Fire extinguishers (monthly) Checked for proper pressures and integrity. Extinguishers require complete overhaul every six years.

5.3.8 Fire hydrants (1x/yr) Purged and lubricated as needed.

5.3.9 Fire pumps (Monthly) Checked for proper working condition and leaks. Lubricate as needed.

5.3.10 Flow switches (4x/yr.) Checked for trip point and lubricate as needed.

5.3.11 Magnetic door closures (1x/yr.) Checked for proper operation.

5.3.12 Pull cords (1x/yr.) Checked that correct unit is indicated on annunciator panel.

5.3.13 Pull stations (1x/yr.) Checked for proper trip point and breaker glass intact.

5.3.14 Smoke exhaust fans (2x/yr.) Checked for proper trip point. Lubricate as needed.

5.3.15 Smoke, heat, and carbon monoxide detectors (2x/yr.) inside apartment and common area.

5.3.16 Tamper switches (1x/yr.) Checked for proper trip point and necessary locks intact.

5.3.17 Wet sprinkler system (4x/yr) Inspect fire pump for proper pressure.

5.4 Major Equipment: Routine periodic inspection and service is essential to maintain the safe and dependable operation of equipment and mechanical systems. All motors, pumps, fans, heaters, air conditioners, etc., are to be included. Each piece of equipment should be issued a specific identification number, or code, and referred to as such (i.e. pump #4, or furnace #2). Visibly mark each piece of equipment for easy reference. A separate maintenance log needs to be prepared for each piece of equipment and updated each time an inspection, or repair, is made. A general inspection log can be used if it is customized to suit specific property or equipment needs. The following is a list of most building equipment and their maintenance needs.

5.4.1 Air compressors (2x/yr.) Check for proper operation. Inspect belts and lubricate motor and pumps as needed. Drain condensate from reservoir tank.

5.4.2 Air conditioners/Heat pumps/PTAC units (4x/yr.) Check for proper operation and filters changed. Coils are to be checked and cleaned as needed.

5.4.3 Central Heat and Domestic Hot Water Boilers (Daily) Check for safe and proper operation. Maintenance engineer must consult with manufacturer or service professional for correct maintenance and start-up/shut-down procedures. A separate inspection and service log will be maintained and displayed in all boiler rooms.

5.4.4 Chillers (2x/yr.) Check for safe and proper operation. Maintenance engineer must consult with manufacture or service professional for proper maintenance and start-up/shut-down procedures. A separate inspection and service log will be maintained and displayed in each chiller room.

5.4.5 Circulator pumps and Sewage ejection pumps (4x/yr.) Check for proper operation and leaks. Lubricate shafts, bearings, and seals. Exercise backup pumps and lubricate. Continuous operating pumps may require service more often. Consult manufacturer recommendations for all pumps and applications.

5.4.6 Cooling towers (2,000 hrs.) Check for proper operation. Clean out sumps and in-line strainers. Check belts and lubricate all motor and shaft bearings. Water treatment as needed. Consult manufacturer for other maintenance and service procedures.

5.4.7 Dryers (2x/yr.) Inspect gas supply lines for leaks and integrity. Check lint screens for holes. Inspect exhaust vents for lint buildup and clean as needed. Clean and lubricate coin slots.

5.4.8 Electric panels and switches (1x/yr.) Inspect for moisture, rust, and loose connections.

5.4.9 Elevators (2x/yr.) Check for proper operation and safety control integrity. Inspections and service are to be done by a licensed elevator company, but service logs are to be maintained and filed on site.

5.4.10 Emergency generators (Weekly.) Check for proper operation. Check engine oil, coolant level, fuel level, block heaters, belts, batteries, and battery charger. Consult manufacturer for fluid and filter changes, and other maintenances procedures. Check transfer switch for proper operation. A service log must be maintained and displayed in generator location.

5.4.11 Heaters (1x/yr.) Check for proper operation and thermostatic control. Gas fired heaters must be checked for cracked heat exchangers and flu ventilation, and cleaned.

5.4.12 Laundry Room Vents (2x/yr)

5.4.13 Main Water Valves (1x/yr) All main and riser or zone valves need to be exercised and checked for positive shut-off. Lubricate stems and packing as needed.

5.4.14 Maintenance Equipment (Monthly)

5.4.15 Roofs and Gutters (4x/yr)

5.4.16 Roof exhaust fans (4x/yr) Check for proper operation and inspect belts, blades, and bearings. Lubricate as needed.

5.4.17 Sewer drain (1x/yr) Site Specific

5.4.18 Swimming Pool Equipment (2x/yr) Inspect pumps, valves, filters, etc. for operation and leaks. Consult manufacturer's recommendations for proper maintenance. Equipment will need to be winterized at the end of the season (depending on the region)

5.4.19 Trash Compactors (Daily) Check for proper operation and obstructions. (4x/yr.) Inspect hydraulic lines for cracks or leaks. Lubricate motors/pumps (if necessary), shafts and hinges. Check oil reservoir level. Clean shoots, hoppers, compact chambers, and photo lens/reflectors.

5.4.20 Washing machines (2x/yr.) Inspect hoses for leaks and swelling. Rubber hoses are to be replaced every five years. Clean and lubricate coin slots (Teflon spray).

## 6. Repair and Reporting

6.1 When deficient conditions are discovered, the following actions must be taken until the conditions are restored to proper working order.

6.1.1 When possible, on-site staff will make immediate repair. Repair will be documented in Preventative Maintenance Schedule, with a Service Request, or both.

6.1.2 If immediate repair is not possible, a Service Request will be written and completed within 24 hours.

6.1.3 If there is any unsafe condition, that condition will be immediately repaired and/or "protected" to alert passerby of the danger and prevent injury.

6.1.4 If repair cannot be promptly completed in-house, Property Manager and Regional Manager must be immediately notified.

## 7. Preventative Maintenance Notebook

7.1 **A Preventive Maintenance Notebook** for your property is required and must be maintained regularly. The notebook should be divided into four sections: one for the Annual PM Calendar, one section for the Monthly PM Schedules, one section listing all of the full PM descriptions, and categories listed above and one section any areas or equipment that require a full replacement that would qualify for a capital improvement in the new budget year.

**WYNNIE THEATRE SENIOR  
Pre-Closing Stabilized Budget - Payroll**

AKA WYNNIE THEATER SENIOR  
UNITS 50  
DATE 11/13/14

STATE PROPERTY/LOCATED PA (PA, NJ, DC, MD, TN, NY, OH, AL)

ACCOUNT	TITLE	EMPLOYEE NAME	PAYROLL PERCENT	HOURLY WAGE	HOURS PER YEAR	ANNUAL SALARY	SALARY PERCENT INCREASE	EFFECTIVE MONTH (1=JAN)	EFFECTIVE NO. MONTHS	NEW HOURLY SALARY	PROJECTED OVERTIME (PER)	PAYROLL PERCENT SALARY	Payroll Allocation
61100011	Property Manager	TBD	100.00%	\$ 23.33	2,080	\$ 48,526	3%	6	6	\$ 24.03	0	\$ 49,253.89	1.00
61150000	Leasing Associate				2,080		3%	6	6		0		0.00
61150000	Leasing Associate				2,080		3%	6	6		0		0.00
61150000	Leasing Associate				2,080		3%	6	6		0		0.00
61450000	Maintenance Supervisor				2,080		3%	6	6		0		0.00
61450000	Maintenance Assistant				2,080		3%	6	6		0		0.00
61450000	Maintenance Technician		100.00%	\$ 18.03	2,080	\$ 37,500	3%	6	6	\$ 18.57	0	\$ 38,062.50	1.00
61450000	Maintenance Technician				2,080		3%	6	6		0		0.00
61450000	Maintenance Technician				2,080		3%	6	6		0		0.00
61450000	Preventive Maintenance				2,080		3%	6	6		0		0.00
61250000	Temporary Maintenance				2,080		3%	6	6		0		0.00
61450000	Grounds Porter				2,080		3%	6	6		0		0.00
61500000	Janitorial				2,080		3%	6	6		0		0.00
61100011	Assistant Property Manager				2,080		3%	6	6		0		0.00
61350000	Office Clerical/ OCS				2,080		3%	6	6		0		0.00
61250000	Temporary Office				2,080		3%	6	6		0		0.00
61400000	Service Coordinator				2,080		5%	6	6		0		0.00
<b>TOTAL</b>												\$ 87,316.39	2.00

**PAYROLL SUMMARY**

ACCOUNT	TITLE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
61100011	Property Manager	\$ 3,732.77	\$ 3,732.77	\$ 3,732.77	\$ 5,599.15	\$ 3,732.77	\$ 3,732.77	\$ 3,844.75	\$ 3,844.75	\$ 3,844.75	\$ 5,767.13	\$ 3,844.75	\$ 3,844.75	\$ 49,253.89
61150000	Leasing Associate	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61150000	Leasing Associate	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61150000	Leasing Associate	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total Leasing Salaries</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61450000	Maintenance Supervisor	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61450000	Maintenance Assistant	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61450000	Maintenance Technician	\$ 2,884.62	\$ 2,884.62	\$ 2,884.62	\$ 4,326.92	\$ 2,884.62	\$ 2,884.62	\$ 2,971.15	\$ 2,971.15	\$ 2,971.15	\$ 4,456.73	\$ 2,971.15	\$ 2,971.15	\$ 38,062.50
61450000	Maintenance Technician	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61450000	Maintenance Technician	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61450000	Preventive Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total Maint. Salaries</b>	\$ 2,884.62	\$ 2,884.62	\$ 2,884.62	\$ 4,326.92	\$ 2,884.62	\$ 2,884.62	\$ 2,971.15	\$ 2,971.15	\$ 2,971.15	\$ 4,456.73	\$ 2,971.15	\$ 2,971.15	\$ 38,062.50
61450000	Grounds Porter	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61500000	Janitorial	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61350000	Assistant Property Manager	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61350000	Office Clerical/ OCS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	<b>Total Office Salaries</b>	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -



**WYNNE THEATRE SENIOR  
Pre-Closing Stabilized Budget - Payroll**

<b>AKA</b>	WYNNE THEATER SENIOR
<b>UNITS</b>	50
<b>DATE</b>	11/13/14

STATE PROPERTY LOCATED PA (PA, NJ, DC, MD, TN, NY, OH, AL)

61250000	Temporary Maintenance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61250000	Temporary Office	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Total Temp. Salaries</b>		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
61400000	Service Coordinator	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>TOTAL</b>		\$ 6,617.38	\$ 6,617.38	\$ 9,926.08	\$ 6,617.38	\$ 6,617.38	\$ 6,617.38	\$ 6,617.38	\$ 6,815.91	\$ 6,815.91	\$ 10,223.86	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91	\$ 6,815.91

**PERFORMANCE BONUS** 61900000

TITLE	BASE PERCENT	BASE SALARY	TOTAL
Property Manager	7%	\$ 49,253.89	\$ 3,447.77
Leasing Associate	5%	\$ -	\$ -
Leasing Associate	5%	\$ -	\$ -
Maintenance Supervisor	7%	\$ -	\$ -
Maintenance Assistant	5%	\$ -	\$ -
Maintenance Technician	5%	\$ 38,062.50	\$ 1,522.50
Maintenance Technician	5%	\$ -	\$ -
Maintenance Technician	5%	\$ -	\$ -
Preventive Maintenance	5%	\$ -	\$ -
Grounds Porter	5%	\$ -	\$ -
Housekeeper	5%	\$ -	\$ -
Assistant Property Manager	5%	\$ -	\$ -
Office Clerical/OCS	5%	\$ -	\$ -
Temporary Maintenance	0%	\$ -	\$ -
Temporary Office	0%	\$ -	\$ -
Service Coordinator	5%	\$ -	\$ -
<b>TOTAL</b>			\$ 4,970.27

**PAYROLL TAXES** 61600011

ACCOUNT DESCRIPTION	ASSUMPTION	RATE	CAP PER EMPLOYEE	ANNUAL COST	MONTHLY COST
FUTA		0.60%	\$ 7,000.00	\$ 84.00	\$ 7.00
FICA		7.65%	\$ 117,900.00	\$ 6,679.70	\$ 556.64
STATE UNEMPLOYMENT:					
PA		9.00%	\$ 8,750.00	\$ 1,575.33	\$ 131.28
NJ		6.40%	\$ -	\$ -	\$ -
DC		0.00%	\$ -	\$ -	\$ -
MD		7.50%	\$ -	\$ -	\$ -
TN		6.60%	\$ -	\$ -	\$ -
NY		9.90%	\$ -	\$ -	\$ -
OH		7.60%	\$ -	\$ -	\$ -
AL		5.80%	\$ -	\$ -	\$ -
<b>Total</b>				\$ 8,339.03	\$ 694.92

**WORKMAN'S COMP** 61750000

ACCOUNT DESCRIPTION	TYPE	RATE	TOTAL CATEGORY WAGES	MONTHLY COST	ANNUAL COST
PA	Clerical	0.32	\$ 49,253.89	\$ 15.88	\$ 190.61
PA	Janitorial	16.66	\$ 38,062.50	\$ 634.12	\$ 7,609.46
NJ	Clerical		\$ -	\$ -	\$ -
NJ	Janitorial		\$ -	\$ -	\$ -
DC	Clerical		\$ -	\$ -	\$ -
DC	Janitorial		\$ -	\$ -	\$ -
MD	Clerical		\$ -	\$ -	\$ -
MD	Janitorial		\$ -	\$ -	\$ -
TN	Clerical		\$ -	\$ -	\$ -
TN	Janitorial		\$ -	\$ -	\$ -
NY	Clerical		\$ -	\$ -	\$ -
NY	Janitorial		\$ -	\$ -	\$ -
OH	Clerical		\$ -	\$ -	\$ -
OH	Janitorial		\$ -	\$ -	\$ -
AL	Clerical		\$ -	\$ -	\$ -
AL	Janitorial		\$ -	\$ -	\$ -
<b>TOTAL</b>			\$ 87,316.39	\$ 650.01	\$ 7,800.07

**WYNNE THEATRE SENIOR  
Pre-Closing Stabilized Budget - Payroll**

AKA	WYNNE THEATER SENIOR
UNITS	50
DATE	11/13/14

STATE PROPERTY LOCATED PA

(PA, NJ, DC, MD, TN, NY, OH, AL)

HEALTH INSURANCE 61850011

\* If payroll is allocated apply same allocation to benefits  
\* ex. 80% allocation = .80 for number employe elected

ACCOUNT DESCRIPTION	COVERAGE	COST OF COVERAGE	EXTENSION	NO. EMPLOYEES ELECTED(*)	MONTHLY COST	ANNUAL COST
Health Insurance	Single	\$ 331.65	per month/ emp	1.00	\$ 331.65	\$ 3,979.77
Health Insurance	Parent/Child	\$ 527.46	per month/ emp	1.00	\$ 527.46	\$ 6,329.57
Health Insurance	Parent/Children	\$ 642.79	per month/ emp	0.00	\$ -	\$ -
Health Insurance	Couple	\$ 672.16	per month/ emp	0.00	\$ -	\$ -
Health Insurance	Family	\$ 847.78	per month/ emp	0.00	\$ -	\$ -
Dental Insurance	Single		per month/ emp		\$ -	\$ -
Dental Insurance	Parent/Child(ren)		per month/ emp		\$ -	\$ -
Vision Insurance	Single		per month/ emp		\$ -	\$ -
Vision Insurance	Parent/Child		per month/ emp		\$ -	\$ -
Vision Insurance	Parent/Children		per month/ emp		\$ -	\$ -
Vision Insurance	Couple		per month/ emp		\$ -	\$ -
Vision Insurance	Family		per month/ emp		\$ -	\$ -
<b>TOTAL</b>				<b>2.00</b>	<b>\$ 859.11</b>	<b>\$ 10,309.34</b>

**ADDITIONAL BENEFITS**

ACCOUNT	ACCOUNT DESCRIPTION	COVERAGE	RATE	EXTENSION	NO. EMPLOYEES ELECTED	MONTHLY COST	ANNUAL COST
61800011	Life/Disability	Employee Only	\$ 0.42	per month/ emp	1.00	\$ 30.56	\$ 366.73
	Long Term Disability	Employee Only	\$ 0.12	per month/ emp	1.00	\$ 8.73	\$ 104.78
	Life Insurance						
	<b>Total</b>					<b>\$ 39.29</b>	<b>\$ 471.51</b>

TOTAL PAYROLL 119,206.62  
2,619.49 401 K  
\$ 121,826.11

Tab 10. Supportive Services Plan

Included in the section is:

- Supportive Services Plan

## **SUPPORTIVE SERVICES PLAN**

### **Introduction**

Pennrose Management Company, established in 1981, has long been committed to supportive service provision as an integral and vital component of property management. Pennrose enjoys a reputation as a leader in the development and delivery of service programs at its portfolio of sites, currently comprised of 180 properties and 10,000 Units. Pennrose Management Company's stated goals in the management of its properties are, in addition to the practice of sound business management, "to coordinate the involvement of local public and private agencies that can provide essential services, and to effect the meaningful involvement of residents in the social management of the property".

Our experience in developing senior residences is extensive with 47 senior developments and 3,420 units, as is our experience in building community spaces such as schools, and space for various community programs. Pennrose is excited to develop a Wynne Theatre that will meet the needs of the community. Supporting seniors to "age in place" is a major goal of our supportive services department.

Pennrose has a width and breadth of experience in revitalizing neighborhoods in many states, whether it is demolishing existing aging buildings and replacing with new, state of the art buildings and designs, building home ownership and mixed income units, incorporating commercial businesses within the development and replacing aging out of date community facilities. Some of our most recent examples are our collaboration with the Paterson Housing Authority in Paterson, NJ to demolish old housing authority projects and replace them with beautiful townhomes with 1, 2, 3 and 4 bedroom rental units and soon to be built single family homes for purchase and a new community center which will serve the community with the exercise and gym available to local YMCA classes, Boys and Girl Clubs, a Day Care Center and health programs from outside health providers and the local Health Department.

Other great examples are in Maryland with the redevelopment in Annapolis, demolishing aging Housing Authority buildings and replacing them with beautiful new buildings. This Housing contains a Community Center, Head Start School. Pennrose has completed other developments in Baltimore, Orchard Ridge I & II and Uplands. Pennrose also has a number of other successful developments in Pennsylvania where both new and rehabbed properties have served to upgrade the surrounding neighborhoods.

Relocating of residents from public housing to new mixed use developments is an art form and it is helpful to have experience in this unique adventure. We have used different models to accomplish the successful relocation of former residents; sometimes partnering with a local non-profit who already knows the population intimately and then contracting with them to continue this role moving into the new buildings, working closely with the Housing Authority to develop a concerted and collaborative approach to these residents relocation and using our Supportive Service Coordinator to provide the extra service to the residents. Pennrose prides itself in its excellent working relationships with Local Housing Authorities.

The projects noted above are only a small subsection of the multitude of projects which would not have been possible without our partnerships with the housing authorities. It is their vision and strategy that brings the project to fruition. The local collaboration ensures productive non-profit partnerships are developed and maintained which will enhance the future for the residents. At all times, Pennrose seeks to share resources with its housing partners, for together, in collaboration, we can take advantage of each other's strengths and develop a stronger base of support for the shared project.

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## **PennReach**

Further expanding its commitment to providing meaningful and empowering services to its entire portfolio, in 2012 Pennrose Management Company developed a non-profit entity "PennReach Inc." The role of PennReach is to maximize the outreach to the residents of Pennrose developments, further develop resources and connections to the community to enhance our residents' successful outcomes. Access to good, safe, quality housing is the foundation for all at risk populations, whether disadvantaged children and families, seniors or individuals with special needs. In addition to a more typical supportive services role, PennReach is able to solicit donations for the residents, apply for grant funding to develop innovative programs to address some of the urgent needs of the residents and work collaboratively with local non-profits to work toward a common goal-independence and self-sufficiency.

PennReach mission statement focuses on helping to build neighborhoods by addressing the holistic needs of the individual by providing good quality affordable housing, employment opportunities, education and training for all people in need-whether seniors, families facing challenges of low income and related problems, or people with special needs.

PennReach Inc., as a non-profit arm of Pennrose works in concert to build the resources and supports to help their tenants maintain their housing. PennReach Pres. /CEO has a wealth of experience coordinating the services of adults with special needs as well as seniors; whether it is obtaining Health Aides, Certified Nursing Assistants, or In-home Physicians to attend to those with issues such as mobility, housekeeping, and bathing/dressing as well as helping them access disability and technology services. Other needs such as volunteerism, senior independence and socialization will be addressed for all senior residents by PennReach.

One of our newest initiatives in our senior buildings is working with Bayada, a community medical provider of nurses, aides, PT, OT etc. This wellness initiative brings seniors to medical care sooner, as they get comfortable with the local provider who visits them on a regular basis providing wellness seminars and health screenings.

PennReach's services are overseen by Pres./CEO Krystal Odell, who has thirty years' experience directing and managing services of people with disabilities and seniors-ranging from intensive supports to case management functions, rehabilitation technology and wrap around services-looking to address the social welfare needs of these vulnerable populations. She is familiar with functional assessments and Activities of Daily Living (ADL) scales, and currently oversees the linking of the necessary services for PennReach's physically disabled residents/seniors throughout the Pennrose portfolio, utilizing the Global Options and Community Choice departments of the Office on Aging, Division of Developmental Disabilities Services, Division on Disability Services, county aging/disability services as well with the service sector of Medicaid/Medicare programs. The goal as stated above is for our seniors who are in excellent quality affordable senior housing access the services to allow them "to age in place".

## **Innovative Initiatives**

Some classic examples of Pennrose/PennReach innovative partnerships with local communities and non-profit entities are our community gardens in Camden and Philadelphia. Many senior residents are proud to maintain their plot in the community garden; enabling them to access free produce while staying physically active. These initiatives are made possible with local community involvement and non-profit partners who help us to organize the community projects as well as promote the Pennrose "fresh" initiative as we bring fresh food into

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the "food deserts" of the inner-cities. This involves stationing local fresh produce vendors in our buildings, and working with nutritionists and other professionals for health wellness seminars. Our seniors have greatly benefited from our nutrition programs where we have increased their access to fresh food by vendors that come to the property, free or reasonable food delivery and access to food programs/pantries through PennReach. Two of our major food initiatives involve Shop Rite's (Uplift Foundation) in Philadelphia with other collaborative partners such as Temple University and Campbell's Soup in Camden, working with their Foundation to fight childhood obesity and working with local partners on the health and wellness of our families and seniors. Other joint projects include bridging the digital divide for the impoverished and needy residents with internet capability, computer labs and classes in numerous buildings throughout our portfolio. Seniors tend to experience greater isolation as they age and working to develop their computer access to family, friends and community resources tends to widen their horizons.

These types of innovative projects serve to meet the needs of the residents of our buildings and are just a sample of the way Pennrose approaches supportive services, trying to bring needed services and resources to our residents. We, at Pennrose recognize that housing is only the beginning and a variety of supports are needed to ensure success in their new living environment.

#### **Penrose's Supportive Services Department's Mission Statement**

To ensure a successful living experience for all residents of Pennrose managed properties by providing access to and assistance in securing necessary supportive services which enhance the quality of their lives. Beyond large scale supportive service initiatives are the everyday connections needed by our residents.

These connections are achieved by advocating, on behalf of the residents and linking them to appropriate service provider agencies and services. Our objective is to provide services that help maintain and prolong the residents' ability to live independently and improve self-esteem, self-sufficiency and self-empowerment, both as individuals and as a community. Additionally, by working proactively with the site staff, we strive to alleviate most common problems to affordable housing; such as high turnover, rent- delinquencies, property damage, vacancy losses and evictions; thereby improving 'Overall property operation though enhanced resident relations and stronger fiscal operations."

As we work with seniors we include existing informal and family supports whenever possible and appropriate.

#### **PENNROSE PROPERTY MANAGEMENT/SUPPORTIVE SERVICES ROLE**

Pennrose carefully screens and selects as Property Managers and Supportive Service Coordinators individuals who are especially sensitive to the human service needs of residents. The Service Coordinator will provide oversight of the service delivery to ensure the Supportive Services Plan is carried out and the residents' changing needs are met through the Coordinator's on-site presence, monthly activity reports, and periodic needs assessments of the residents. The Property Manager will be responsible for the social and human service needs of residents as well as the physical and fiscal management of the property. Additionally, it will be the Property Manager's job to work in conjunction with the Supportive Services Coordinator to carry out and coordinate the Supportive Services Plan. It is a holistic model where services are everyone's job.

The delivery of services to seniors is an important part of providing quality housing and facilitating increased self-sufficiency for the residents of affordable housing communities. Pennrose partners with local agencies and builds collaborative relationships so that the residents at Wynne Theatre will be supported in a service-

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enriched environment. The community will be managed by Pennrose, which will work in coordination with the other local organizations and partner agencies to provide appropriate services to meet the needs of residents. It is the desire of Pennrose Management Company to improve the overall health, safety, and welfare of our vulnerable residents and to help residents maintain their self-sufficiency in affordable housing. In all of our Pennrose family sites Service Coordinators help residents access a plethora of services to assist them with addressing various human service conditions such as health care, unemployment, substance abuse, transportation; ongoing education and illiteracy.

Pennrose believes that by providing the necessary interventions and assistance to residents, we are fostering a stronger community. Therefore; with the resources available in the local community, we will have an extraordinary level of services available to the residents. We have received strong support for this senior housing development from numerous neighborhood associations, service provider agencies, and local businesses.

The supportive services program at Wynne Theatre will be targeted to all residents of the property, to enable them to remain independent and to facilitate their continued and greater involvement in the community. The community is comprised of senior residents the majority of whom do not work and are on fixed incomes consisting predominantly of social security and disability benefits. This targeted population has severely limited disposable income and little opportunity to increase their income through additional employment opportunities. While the need for services cannot be projected solely on the basis of age or income, past experience demonstrates that the residents will continue to require some level of supportive service to maintain their independence.

It has been PMC's experience at tax credit communities where a number of residents receive rental assistance and/or are predominately single, that the majority benefit from a strong supportive environment where daily obstacles to independent living are limited or eliminated. The specific services that are provided to the residents of a senior affordable housing community will vary depending on the unique needs and wishes of the residents. Though residents always access services on a voluntary basis, we anticipate that all the residents at Wynne Theatre will participate in supportive service provision at some level because of the challenges that face them each day in living independently.

The specific kinds of services that are provided to the residents of a senior affordable housing community obviously will vary depending on the unique needs and wishes of the residents: Furthermore, while the need for services cannot be projected solely on the basis of income or family status, Pennrose anticipates that a significant percentage of residents at Wynne Theatre will require some level of supportive service to facilitate self-sufficiency. Individual needs must be assessed through a variety of means including personal interviews, surveys, referrals, etc.

### **Resident Services**

At the time of initial move-in, the Service Coordinator will meet with each new resident to ensure that the resident understands his/her role within the community, to preliminarily assess each resident's level of need and explain the availability of supportive services, as well as the procedures for accessing such services. Thereafter, residents may be referred to the Supportive Service Coordinator by the Property Manager, family members, outside agencies or self-referral.

Residents will be kept well informed of available services and upcoming events within the community by means of newsletters, flyers, bulletin board notices, announcements at resident meetings and personal

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interaction with the On-site Supportive Service Coordinator. Information and referral services will be provided on-site, with individualized case management provided on an as-needed basis by the Supportive Service Coordinator and local service agencies. Provider agencies will be invited periodically to give presentations on available off-site services as well.

Pennrose will work closely with the supportive service providers to ensure that a range of empowerment services is available. Pennrose will partner closely with several local provider agencies in Philadelphia County that operate programs in the area; thus a variety of social, recreational, family and senior programs will be available for all the residents of Wynne Theatre.

The community space/Bayada nurse office in Wynne Theatre will provide the space needed for one-on-one counseling, the sharing of beneficial information and referrals and a variety of programs, activities and events. Additionally, Pennrose will look to connect with a local provider for affordable wireless internet connectivity and a computer lab providing internet/computer training. The residents of Wynne Theatre will benefit greatly from the array of community partners engaged with Pennrose that help offer a wide variety of programs and services.

Wynne Theatre, with its rich history will be renovated to its next life; as a vital development where seniors can age in place. In keeping with the Wynne Theatre tradition we propose to continue in the strong arts tradition with innovative arts programs for seniors. That will include bringing in arts groups such as the University City Arts League who will offer poetry workshops,

### **1) Anticipated Resident Needs and Program Goals**

#### **a) Identify the target population.**

The supportive services program at Wynne Theatre will be targeted to all residents of the property, to enable them to remain independent and to facilitate their continued and greater involvement in the community.

Wynne Theatre Apartments, a 50 unit housing site, is intended to provide affordable rental housing to seniors. It has been Pennrose's experience that the average age of seniors living at our PHFA/Tax Credit communities is 75 years of age. Typically, 90-95% of the population is women; the majority does not work and have fixed incomes consisting predominantly of social security benefits. Therefore, because this targeted population has severely limited disposable income and little opportunity to increase their income through additional employment opportunities, we anticipate that all residents will participate in supportive service provision at some level in the Wynne Theatre.

#### **b) Identify the goals of the supportive services program.**

Pennrose Management Company's goals for Senior Properties are as follows:

1. To foster resident independence by bringing numerous services to the site, such as on-site banking, grocery delivery, aging services (to include enrollment in various entitlement programs), housekeeping assistance and access to affordable and reliable transportation;
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2. To create a cohesive community by providing access to, in concert with local senior centers, a wide array of educational activities on a regular basis, as well as meaningful volunteer opportunities and lifelong learning opportunities;
  3. To maintain optimum health of the residents through educational programs, preventive health and wellness screenings, fitness and nutrition programs, referrals to local resources that provide access to affordable medications and medical supplies;
  4. To effectively address the needs of the resident population by developing and maintaining solid working relationships with a network of service provider agencies, local government agencies, businesses, churches and schools in close proximity to the site;
  5. To ensure that the physical asset is effectively maintained through the provision of supportive services.
- c) Identify measurable target outcomes related to each goal.

Our goals all correspond to the outcome of having an engaged and vital senior community where seniors are able to age in place-finding the supports, services and opportunities that allow them to live longer and in a home of their choice. Targeted outcomes include:

1) Presentation by Clarifi and follow-up one on one assistance with the financial empowerment center to assist seniors in applying for entitlement programs and planning for their financial future. With on-site services such as on-site banking, grocery delivery, housekeeping assistance, access to affordable and reliable transportation and personal aide services seniors will be able to be more independent as they age; with services filling in the gaps for things they may no longer be able to perform due to age or infirmity

2.) Wynne Theatre Supportive services will connect senior residents with nearby senior centers, assisting them with applications and locating transportation as needed to develop resources for the community. Pennrose will provide educational programming on-site through our partnerships with St. Joseph's University students, the University City Arts League and the West Park Cultural Center. We endeavor to build a vital community with classes on-site that will challenge their mind and display their talents. Our linkage with St. Joseph's University will allow us to not only access their already existing resources but work as a site for student interns/volunteers where they can gain valuable career experience while meeting the needs of the senior residents on-site. Staff will also develop linkages for senior employment/volunteers opportunities. Staff will bring the foster grandparent program and senior employment program which offers paid employment opportunities for seniors. We will also bring in RSVP and other agencies that may offer volunteer opportunities. Our desired outcome is lifelong learning opportunities.

3) The Wynne Theatre senior development will assist residents physically and medically through our medical navigating partnership with Bayada Health Services. There will be a nurse on site one day a week at no cost to the seniors. The nurse will be there for advice, referrals and medical follow-up for the seniors. We currently have this medical navigation service through our partnership with Bayada Health Services at 5 senior sites and it has reaped great dividends for our seniors. Often seniors have lost their trusted doctors/advisors and are lost in the current medical quagmire. They repeatedly will not go the doctor, or wait too long. By building trust with a new medical advisor we are finding that seniors are accessing medical care sooner and have better outcomes. Another important aspect of this medical navigation program is that the advisor will coordinate care for the resident once in the hospital/rehab to home. Through this partnership and other local hospital

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affiliates we will hold educational programs, preventive health and wellness screenings, fitness and nutrition programs, and referrals to local resources that provide access to affordable medications and medical supplies. The outcome is our residents living longer, healthier and successfully.

4.)The Supportive Services Coordinator will effectively address the needs of the resident population by developing and maintaining solid working relationships with a network of service provider agencies, local government agencies, businesses, churches and schools in close proximity to the site; At Wynne Theatre we are connecting with the neighborhood associations of agencies and business owners. Our connection with Terry Foley of The City Avenue Special Services District is an outcome of locating supportive organizations that will assist our residents to be involved in their new community. We will access local churches to come in and present to interested seniors-ways they may choose to give back to their community.

5. Our specific outcome is that the Wynne Theatre will continue to be a beautiful building to live. We will accomplish this through developing the pride of the residents in their building, vigilant assistance to residents-whether it is supplying housekeeping, educational and supportive services; all contributing to making Wynne a vibrant senior community.

By striving to achieve the goals outlined above, we expect residents to improve their ability to gain greater self-sufficiency and enhance their economic position. With the necessary resources readily available to meet their individualized and changing needs, residents of Wynne Theatre will enjoy an enhanced quality of life in a cohesive community. Staff will maintain records of resident participation in the various programs and will solicit resident feedback to measure satisfaction with service delivery and the types and frequency of programs being offered. Outcomes such as low resident turnover, an extensive waiting list for the property, few housekeeping citations and high participation in activities will be significant indicators that will be tracked to measure the positive impact and success of service provision at Wynne Theatre.

- d) Describe how the program will identify resident needs at start-up and respond to the changing needs of residents over time. (Example: resident meetings, needs assessments, surveys, etc.)

A resident assessment will be done for each resident shortly after their move to Wynne Theatre. A community assessment (Resident Survey) will be done within six months of the opening of the site to create a service plan that responds to the specific needs of this community. Thereafter, an assessment will be conducted every two years to effectively identify the impact and success of the supportive service plan. Decisions to add discontinue or augment services will be based upon resident feedback, review of participation in specific activities, service provider feedback/reports, changes in service availability or cost, and staff observations. By working proactively to develop linkages to community service providers, local government agencies, churches, businesses and schools, as well as developing an open line of communication between the Property Manager, Maintenance staff and on-site Service Coordinator, Pennrose is well positioned to not only identify but immediately respond to the changing needs of the residents. Resident needs will be assessed regularly and services that are not initially needed or desired may be added at a later date.

## **2) Implementation of services, programs, and activities.**

- a) Who is responsible for providing each service.

### **SELF SUFFICIENCY**

### **COUNSELING**

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Council for Relationships-The CFR provides family and individual counseling as well as informational workshops on communication, team building, goals setting, etc. The CFR has a sliding-scale fee for services, but provides services free of charge for those who cannot afford to pay.

#### CULTURAL SERVICES

Korean Community Development Services Center--DSC, a nonprofit organization located in the Olney neighborhood of Philadelphia assists community members in the pursuit of education at many different stages of this learning continuum:KCDSC is committed to the needs of the newly immigrated and those with limited English language skills and our social services and immigration programs address these needs. And KCDSC is proud to engage with the Olney community at large through our North 5th Street Revitalization Project. ■Fifth Street Project ■Social Services ■Immigration/Citizenship Services

United Communities Southeast Philadelphia- provides services and community driven activities that address the needs, further the strengths, and reinforce community spirit for more than 6800 children, adults and families through a wide array of services. These services include:•Adult Education (English as Second Language) •Housing counseling and homeowner education •Emergency energy assistance •Emergency food assistance Neighborhood Advisory Committee

#### DISABILITY RESOURCES

Liberty Resources-Center for Independent Living provides Information and referral, peer counseling and connections to the people with disabilities and will be a good resource for the residents of Diamonds, especially the accessible units..

#### EDUCATIONAL RESOURCES

West Park Cultural Center West Philadelphia Senior Community Center  
1016 N. 41st Street (corner of 41st & Poplar Streets)  
GED CLASS ADULT BASIC EDUCATION-BASIC READING GROUP- COMPUTER CLASS

University City Arts League (UCAL) 215-382-7811/Fax: 215-382-3339  
director@ucartsleague.orgArts League Working with Elderly at LIFE Center  
UCAL plans to bring their stellar senior arts program to the Wynne Theatre-mirroring their work with the infirm elderly at the LIFE Center at 45th and Chestnut Streets in West Philadelphia where they bring art, pottery and writing classes to residents of West Philadelphia.

Free Library of Philadelphia: maintains 54 branches that provide internet access, computer classes, during business hours.

COMPUTER TRAINING-e Economy Access-One Economy provides set up and installation of internet access, affordable internet connectivity and computer training. Pennrose will contract with One Economy to insure that residents have internet access at an affordable cost. Pennrose will use part of its supportive service reserve to defer the cost

#### ENERGY

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**Public Utility Commission** provides consumer education and information on maintaining affordable utility costs. This service is free of charge to residents and is provided on site as needed or requested by the residents. The PUC also assist eligible residents with outstanding gas and electric payments.

**Neighborhood Action Bureau** assists residents in learning cost-effective ways to use utilities and conserve energy and, thus, money. The NAB also provides utility assistance money to residents who have a difficult time meeting ever-increasing utility costs.

**Low Income Heating and Energy Assistance Program (LIHEAP)**: is processed through the Philadelphia County Assistance Office. Since residents will pay all their utilities, there is a possibility that some low-income households will be eligible for rebates. The Supportive Service Coordinator will assist tenants in completing the necessary forms requesting fuel assistance rebates.

### **EMERGENCY ASSISTANCE**

Commonwealth of Pennsylvania, Delivered Services Unit provides rental assistance, deposits of permanent renters, and other emergency assistance in order to assist residents in maintaining their permanent housing. This is a referral service and residents must go directly to the State Building to access this service.

### **EXERCISE**

**Philadelphia Freedom Valley YMCA**: provide senior exercise such as silver sneakers that develop seminars maintain their health and well being

### **FINANCIAL HEALTH**

**HEMAP Consumer Credit Counseling Services**: provide Credit Repair, Financial Literacy, money management and Budget Classes in the form of free seminars and a Financial Fitness Program.

**Clarifi-Financial Empowerment Centers**-Offers on-site and off-site financial planning free to Philadelphia residents. They will offer on-site financial planning seminars.

### **HEALTH AND WELLNESS**

**Bayada Nurses Home Agency** provides a nurse once a week for medical navigating, on-site blood pressure screenings and home health care for the residents. They also provide off-site services such as therapy, companionship and household management (housekeeping).

**Visiting Nurses Association (VNA)** provides services for the residents to receive on-site such as the Senior Health Specialist Program (health screenings, health check-ups, counseling, education and nutrition teaching) and an In Home Program (housekeeping, personal care and case management).

### **HOME MAINTENANCE**

**Pennrose Management Company (PMC)**: has developed a Housekeeping Handbook to assist residents in affordable approaches to maintaining a safe and clean home and will continue to make appropriate referrals to outside agencies for housekeeping assistance.

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## **NUTRITION**

**SHARE Food Program**-Share Food is a critical resource for families in need of nutritious food at a reduced cost. For a reduced cost, families may invest \$16 for approximately \$35-40 of breakfast, lunch and dinner foods, providing a family of 4 with 3 meals for 7 days.

**Uplift Foundation**-Provides community residents with access to good fresh food alternatives, nutritional seminars, and medical access for low income residents and benefits counseling

## **SAFETY/COMMUNITY BUILDING**

**Philadelphia Police Department through their Philly Rising Initiative** has had a positive and supportive working relationship with Pennrose Management Company. Their community liaisons have come to targeted Pennrose Philly locations, working in the Diamond Street corridor and at Vernon House, and have assisted in forming Neighborhood Watch programs, 311 anonymous tips presentations and workshops on personal safety, safeguarding children, etc.

## **SENIOR CENTERS**

**Philadelphia Area Agency on Aging** mission is to promote the well-being of older adults through a planned, coordinated and collaborative program of health and social services. These services include: Advocacy, Care at Home Services, Employment Assistance, Health Promotion, Home Repair, Information and Referral, Legal Assistance, Home-delivered Meals, Protective Services, Senior Community Centers, and Transportation.

A list of Senior Centers is attached.

## **TRANSPORTATION**

**Southeastern Pennsylvania Transportation Authority (SEPTA)**: Information regarding on-site local bus routes, shuttle and train service information provided by the Supportive Services Coordinator.

## **VOLUNTEERISM**

**Retired Seniors Volunteer Program (RSVP)** provides an off-site program called APPRISE that provides services assisting residents with understanding of Medicaid/Medicare and any other health related insurance issues or concerns.

**Foster Grandparent Program** are a federal program which employ foster grandparents who serve from 15 to 40 hours per week in locations including schools, hospitals, juvenile correctional institutions, daycare facilities or Head Start centers. The program is open to all U.S. citizens, nationals, or lawful permanent resident aliens, 55 years of age and over. Volunteers receive pre-service orientation, training from the organization where you will serve, supplemental accident and liability insurance, and meals while on duty. Volunteers who meet certain income guidelines also receive a small stipend.

**Area Agency on Aging**, other organizations in Pennsylvania also administers the Senior Community Service Employment Programs (SCSEP).

- b) Where each service will be provided. For services that are not provided at the proposed development, identify how barriers to participation will be overcome.
-

Residents of Wynne Theatre will enjoy all the benefits of living in an urban environment, including easy access to a wealth of social service resources. Services such as information and referral, case management, and assistance with entitlement programs will be provided on site at Wynne Theatre. Educational opportunities, classes, wellness screenings, and socialization activities will also be held in the on-site community room. Transportation to other services, medical appointments, shopping and entertainment will be made available through public transportation services and both on and off-site community events will be publicized in regular newsletters to encourage participation.

c) Frequency of program or activity (daily, weekly, monthly, etc.).

Program and service frequency will be determined by the needs and desire of the residents. Services such as information and referral, case management, and assistance with entitlement programs may be provided on a weekly basis. Other services such as educational seminars may be offered monthly.

d) Eligibility requirements or fees for resident participation. Services should be available for all residents. Identify any eligibility requirements or fees for services.

Services are made available to all residents free of charge and at the will of the residents. Some service providers may charge a nominal fee or use a sliding scale for services offered; use of those services is at the discretion of the resident.

e) Methods to market the service program and encourage resident participation.

Pennrose Management Company (PMC) is committed to the provision of appropriate supportive services as a means of enriching the quality of our residents' lives. We encourage participation in these services chiefly by providing services that are of interest and use to the residents. This is ensured by regularly assessing resident need and requesting the input of the community in program planning. However, we also recognize and respect the right of the individual to choose his or her own lifestyle and therefore participation in supportive service activities will not be mandatory.

Residents will be kept well informed of available services and upcoming events by means of newsletters, flyers, bulletin board notices, and personal interaction with the on-site Supportive Service Coordinator. Regular resident meetings also present an opportunity for announcing upcoming events, as well as daily posted announcements and word-of-mouth circulation. Numerous services will be provided on site, and provider agencies will be invited periodically to give presentations on available off-site services as well.

To encourage even greater participation in the community, the Property Manager and Supportive Service Coordinator will make themselves available to work with any interested residents to form an active Residents Association.

### 3) Staffing

- a) Identify staff positions involved, their location and number of hours per week dedicated exclusively to services at the development. Recommended minimum: 1 hour/week for every 5 units.

The Wynne Theatre community will benefit greatly from having Supportive Services provided by a Pennrose Management Company Supportive Services Coordinator on-site for a minimum of 10 hours/week, consistent with the 1:5 ratios for service provision identified by PHFA.

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**4) Describe supervision and support (office space, computer with Internet/email access).**

The Supportive Services Coordinator (SSC) will report to the Manager of Wynne Theatre. Penrose Management Company (PMC)'s Supportive Services Director and Supportive Services Auditor will also work closely with the SSC to ensure that the goals of the supportive services plan are realized. The SSC will work closely with the Maintenance staff, and outside service provider agencies to identify and effectively respond to resident needs, as outlined above. The SSC will take the lead role in organizing services, programs and activities for the residents, as well as maintaining existing and cultivating new liaisons with community resources and services. The SSC will also encourage and develop resident participation in the decision-making process regarding which services, programs and activities they desire. The SSC will have access to office space on site, including access to computer, internet, secured files and confidential space to meet with residents.

**5) Budget and source of funds.** Identify the annual cost and the source of funds to pay for services and staffing.

A Supportive Services Escrow will be funded in the amount of \$150,000 for the provision of these services for the tax credit compliance period. This will be achieved by providing 11 hours per week of Supportive Services. Annual salary/benefits of \$10,000.00 with a 2.5% each year has been incorporated into the operating budget for the property (Supportive Services Line item).

**6) Coordination with and commitment of community resources.** If other service providers are integral to this plan of services, include a letter of intent describing what services they will provide.

### **Philadelphia County Senior Centers**

Philadelphia Corporation for Aging funds nearly 50 local community senior centers and satellite meal programs offering a variety of activities.

#### Center in the Park

5818 Germantown Avenue, Philadelphia, PA 19144

(215) 848-7722 Monday to Friday

E-Mail: [rcunningham@centerinthepark.org](mailto:rcunningham@centerinthepark.org)

Web Site: [www.centerinthepark.org](http://www.centerinthepark.org)

#### CSS Norris Square Senior Citizen Center

2121-37 North Howard Street, Philadelphia, PA 19122

(215) 423-7241 Monday to Friday

E-Mail: [bbutler@chs-adphila.org](mailto:bbutler@chs-adphila.org)

Web Site: [www.familyservices-phl.org/seniorcenters.html](http://www.familyservices-phl.org/seniorcenters.html)

#### CSS St. Anne's Senior Citizen Center

2607 East Cumberland Street, Philadelphia, PA 19125

(215) 423-2772 Monday to Friday

E-Mail: [bhartzell@chs-adphila.org](mailto:bhartzell@chs-adphila.org)

Web Site: [www.familyservices-phl.org/seniorcenters.html](http://www.familyservices-phl.org/seniorcenters.html)

#### CSS St. Charles Senior Community Center

1941 Christian Street, Philadelphia, PA 19146

(215) 790-9530 Monday to Friday

E-Mail: [kboles@chs-adphila.org](mailto:kboles@chs-adphila.org)

Web Site: [www.familyservices-phl.org/seniorcenters.html](http://www.familyservices-phl.org/seniorcenters.html)

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CSS Star Harbor Senior Center

4700 Springfield Avenue, Philadelphia, PA 19143

(215) 726-7468 Monday to Friday

E-Mail: [epatterson@chs-adphila.org](mailto:epatterson@chs-adphila.org)

Web Site: [www.familyservices-phl.org/seniorcenters.html](http://www.familyservices-phl.org/seniorcenters.html)

Haddington Multi-Services for Older Adults, Inc.

5331-41 Haverford Avenue, Philadelphia, PA 19139

(215) 472-6600 Monday to Friday

E-Mail: [cbrewington@haddington.org](mailto:cbrewington@haddington.org)

Web Site: [www.haddington.org](http://www.haddington.org)

JCCs Klein Branch Senior Center and Russian Satellite

10100 Jamison Avenue, Philadelphia, Pa. 19116

(215) 698-7300 Monday to Friday

E-Mail: [bshotz@kleinjcc.org](mailto:bshotz@kleinjcc.org)

Web Site: [www.phillyjcc.com](http://www.phillyjcc.com)

JCC's Stiffel Senior Center

604 West Porter Street, Philadelphia, PA 19148

(215) 468-3500 Monday to Friday

E-Mail: [shoffman@stiffelcenter.org](mailto:shoffman@stiffelcenter.org)

Web Site: [www.phillyjcc.com](http://www.phillyjcc.com)

JCCs Tabas House Satellite

2101 Strahle Street Philadelphia, PA 19152

(215) 745-3127 Tues, Wed, Thurs, Fri

Web Site: [www.phillyjcc.com](http://www.phillyjcc.com)

Juniata Park Older Adult Center

1251 East Sedgley Avenue, Philadelphia, PA 19134

(215) 685-1490 Monday to Friday

E-Mail: [donna.mckinney@phila.gov](mailto:donna.mckinney@phila.gov)

Web Site: [www.phila.gov/recreation/senior/Older\\_Adult\\_Programs.html](http://www.phila.gov/recreation/senior/Older_Adult_Programs.html)

Lehigh Senior Center

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Pavilion Building #6, 1701 West Lehigh Avenue, Philadelphia 19132

(215) 226-0761 Monday to Friday

E-Mail: [qfisher@newcourtland.org](mailto:qfisher@newcourtland.org)

Lutheran Settlement House Senior Center

1340 Frankford Avenue, Philadelphia, PA 19125

(215) 426-8610 ext.204 Monday to Friday

E-Mail: [mlutz@lutheransettlement.org](mailto:mlutz@lutheransettlement.org)

Web Site: [www.lutheransettlement.org/seniorcenter.html](http://www.lutheransettlement.org/seniorcenter.html)

Mann Older Adult Center

3201 North 5th Street, Philadelphia, PA 19140

(215) 685-9844 Monday to Friday

E-Mail: [brenda.collazo@phila.gov](mailto:brenda.collazo@phila.gov)

Marconi Senior Citizen Program Samuel S. Fels South Philadelphia Community Center

2407 South Broad Street, Philadelphia, PA 19148

(215) 218-0800 Monday to Friday

E-Mail: [slisa@caringpeoplealliance.org](mailto:slisa@caringpeoplealliance.org)

Web Site: [www.caringpeoplealliance.org](http://www.caringpeoplealliance.org)

Martin Luther King Older Adult Center

2101-35 West Cecil B. Moore Avenue, Philadelphia, PA 19121

(215) 685-2716 Monday to Friday

E-Mail: [ralph.blakney@phila.gov](mailto:ralph.blakney@phila.gov)

Nationalities Senior Program

11th & Rockland Streets, Philadelphia, PA 19141

(215) 324-7544 Monday to Friday

E-Mail: [tarasl@nationalitiesservice.org](mailto:tarasl@nationalitiesservice.org)

Web Site: [www.nationalitiesservice.org](http://www.nationalitiesservice.org)

North Broad Street Senior Center

1438 North Broad Street, Philadelphia, PA 19121

(215) 978-1300 Monday to Friday

E-Mail: [dtaverett@north-city.org](mailto:dtaverett@north-city.org)

Web Site: [www.north-city.org](http://www.north-city.org)

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Northeast Older Adult Center

8101 Bustleton Avenue, Philadelphia, PA 19152

(215) 685-0576 Monday to Friday

E-Mail: [maria.ramirez@phila.gov](mailto:maria.ramirez@phila.gov)

Web Site: [www.phila.gov/recreation/senior/Older\\_Adult\\_Programs.html](http://www.phila.gov/recreation/senior/Older_Adult_Programs.html)

Older Adult Sunshine Center

137 South 58th Street, Philadelphia, PA 19139

(215) 472-6188 Monday to Friday

E-Mail: [jjames@consortium-inc.org](mailto:jjames@consortium-inc.org)

Web Site: [www.consortium-inc.org/ourservices\\_olderadult.shtml](http://www.consortium-inc.org/ourservices_olderadult.shtml)

Olney Senior Program

5900 North Fifth Street, Philadelphia, PA 19120

(215) 424-4807 Monday to Friday

E-Mail: [annettel@lcfsinpa.org](mailto:annettel@lcfsinpa.org)

Web Site: [www.lcfsinpa.org](http://www.lcfsinpa.org)

On Lok House

219 North 10th Street, Philadelphia, PA 19107

(215) 925-3118 Monday to Friday

E-Mail: [onlokhouse2002@yahoo.com](mailto:onlokhouse2002@yahoo.com)

Web Site: [www.onlokphilly.org](http://www.onlokphilly.org)

Peter Bressi N.E. Senior Center

4744-46 Frankford Avenue, Philadelphia, PA 19124

(215) 831-2926 Monday to Friday

E-Mail: [jkmiecik@nemhmr.org](mailto:jkmiecik@nemhmr.org)

PHA Cassie L. Holly Apartments Satellite

2100 Dickinson Street, Philadelphia, PA 19146

(215) 684-4891 Monday to Friday

Web Site: [www.pha.phila.gov/residentservices/senior\\_programs](http://www.pha.phila.gov/residentservices/senior_programs)

PHA Emlen Arms Satellite

6733 Emlen Street Philadelphia, PA 19119

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(215) 684-5892      Monday to Friday  
E-Mail: [charmaine.morton@pha.phila.gov](mailto:charmaine.morton@pha.phila.gov)  
Web Site: [www.pha.phila.gov/residentservices/senior\\_programs](http://www.pha.phila.gov/residentservices/senior_programs)

PHA Wilson Park Satellite  
2508 Jackson Street, Suite 1-A, Philadelphia, PA 19145  
(215) 684-4895  
E-Mail: [edward.rudow@pha.phila.gov](mailto:edward.rudow@pha.phila.gov)  
Web Site: [www.pha.phila.gov/residentservices/senior\\_programs](http://www.pha.phila.gov/residentservices/senior_programs)

Philadelphia Senior Center - Main Branch  
509 South Broad Street, Philadelphia, PA 19147  
(215) 546-5879      Monday to Friday  
E-Mail: [vlynam@philaseniorcenter.org](mailto:vlynam@philaseniorcenter.org)  
Web Site: [www.philaseniorcenter.org](http://www.philaseniorcenter.org)

Philadelphia Senior Center - Tioga Branch  
1531 West Tioga Street, Philadelphia, PA 19140  
(215) 227-9999      Monday to Friday  
E-Mail: [jnelson@philaseniorcenter.org](mailto:jnelson@philaseniorcenter.org)  
Web Site: [www.philaseniorcenter.org](http://www.philaseniorcenter.org)

Philadelphia Senior Center Coffee Cup Satellite  
and Asian Pacific Senior Resource Center  
247 South 10th Street, Philadelphia, PA 19107  
(215) 627-8048      Monday to Friday  
E-Mail: [plai@philaseniorcenter.org](mailto:plai@philaseniorcenter.org)  
Web Site: [www.philaseniorcenter.org](http://www.philaseniorcenter.org)

South Philadelphia Older Adult Center  
1430 East Passyunk Avenue, Philadelphia, PA 19147  
(215) 685-1697      Monday to Friday  
E-Mail: [lynn.sieruc@phila.gov](mailto:lynn.sieruc@phila.gov)

Southwest Senior Center  
6916 Elmwood Avenue, Philadelphia, PA 19142  
(215) 937-1880      Monday to Friday

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E-Mail: [pcunningham@consortium-inc.org](mailto:pcunningham@consortium-inc.org)

Web Site: [www.consortium-inc.org/ourservices\\_olderadult.shtml](http://www.consortium-inc.org/ourservices_olderadult.shtml)

Spring Garden Center

1221 Spring Garden Street., Philadelphia, PA 19123

(215) 787-2944 Monday to Friday

E-Mail: [cbowden@newcourtland.org](mailto:cbowden@newcourtland.org)

The Center at Journey's Way

403 Rector Street, Philadelphia, PA 19128

(215) 487-1750 Monday to Friday

E-Mail: [rkochman@interCommunityaction.org](mailto:rkochman@interCommunityaction.org)

Web Site: [www.intercommunityaction.org](http://www.intercommunityaction.org)

West Oak Lane Senior Center

7210-18 Ogontz Avenue, Philadelphia, PA 19138

(215) 685-3511 Monday to Friday

E-Mail: [sharlene.waller@phila.gov](mailto:sharlene.waller@phila.gov)

West Philadelphia Senior Community Center

1016-26 North 41st Street, Philadelphia, PA 19104-1292

(215) 386-0379 Monday to Friday

E-Mail: [quinetteb@lcfsinpa.org](mailto:quinetteb@lcfsinpa.org)

Web Site: [www.lcfsinpa.org](http://www.lcfsinpa.org)

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**SUPPORTIVE SERVICES PROGRAM REFERRAL**

Site:

Resident Name:

Reason for Referral:

Address:

• Date of Referral:

Phone:

Manager's Signature:

Date Referral was received from Property Management:

Date Resident was contacted by Phone:

Comments:

Date Correspondence was sent/hand delivered:

Comments:

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Date Service Coordinator made Home Visit:

Comments:

Outcome of Action: Agreement (s) Reached with Resident:

Service Coordinator Signature:

Revised. Appendix C-3

Date;

Memorandum of Understanding between (Insert Organization) and  
(Property Name)

This agreement is entered into this \_\_\_ day of \_\_\_, 2013 by and between (Insert Organization), having its principal office and place of business at address (hereinafter referred to as "the Service Provider"), and Pennrose Management Company, having its principal office and place of business at 230 Wyoming Avenue, Kingston, PA 18704 (hereinafter referred to as the "Owner").

WHEREAS, Owner is developing a (insert number) unit affordable property for (families/seniors) in (county, state), known as (property name) ("Facility");

WHEREAS, (insert organization) is a non-profit service provider agency contracted to provide case-management services, community programs, and to facilitate and coordinate the delivery of supportive services to the residents of the Facility;

WHEREAS, the Owner wishes to provide service coordination to the residents of the facility upon lease-up, and the Service Provider agrees to provide supportive services to these residents and has the capability to provide the services, as outlined below;

WHEREAS the parties have agreed to work cooperatively as a team to meet the needs of these residents and understand the critical level of communication that is needed to make this project successful.

NOW, THEREFORE, in consideration of the promises herein made, one to the other, and fully intending to be legally bound thereby, the parties do hereby agree as follows:

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1. Scope of Services:

- **Deliverables:** The goal of the Supportive Services program at (insert property) is to deliver educational and social supportive services to residents. In addition to their regular programming as described in the attached Service Provider Questionnaire the Service Provider will also fulfill the duties described in the attached Supportive Services Coordinator Plan. Responsibilities will include the design, implementation and maintenance of Supportive Services programming that meets the needs of (Insert Property) residents. The Service Provider will work with Management to follow a Supportive Services Plan that addresses issues identified by the Owner. This plan is based on resident and management input and addresses identified asset management and resident issues. The Service Provider will meet all identified reporting requirements, internal and external. The staff is responsible for being a liaison with local social service programs and regulatory agencies and for assessing residents' needs and making appropriate referrals.

- **Supervisory Standards:** The goal of the Supportive Services program at (Insert Property) is to deliver educational and social supportive services to residents. In addition to their regular programming the Service Provider will fulfill the duties of the attached Supportive Services Coordinator job description. Responsibilities will include the design, implementation and maintenance of Supportive Services programming that meets the needs of Maple Village residents. The Service Provider will work with Management to follow a Supportive Services Plan that addresses issues identified by the Owner. This plan is based on resident and management input and addresses identified asset management and resident issues. The Service Provider will meet all identified reporting requirements, internal and external. The staff is responsible for being a liaison with local social service programs and regulatory agencies and for assessing residents' needs and making appropriate referrals.

- **Performance Standards:** Service Provider Staff will provide services to residents and maintain compliance with regulatory agencies, and Owner expectations. The Owner may at any time recommend and require changes in programming to ensure that these standards are met. Service Provider Staff are expected to assess the needs and desires of the resident population and use their judgment and expertise in social services to provide appropriate services that meet the following (senior) goals:

1. To foster resident independence by bringing numerous services to the site, such as on-site banking, grocery delivery, aging services (to include enrollment in various entitlement programs), housekeeping assistance and access to affordable and reliable transportation;

2. To create a cohesive community by providing access to, in concert with local senior centers, a wide array of educational activities on a regular basis, as well as meaningful volunteer opportunities and lifelong learning opportunities;

3. To maintain optimum health of the residents through educational programs, preventive health and wellness screenings, fitness and nutrition programs, referrals to local resources that provide access to affordable medications and medical supplies;

4. To effectively address the needs of the resident population by developing and maintaining solid working relationships with a network of service provider agencies, local government agencies, businesses, churches and schools in close proximity to the site;

5. To ensure that the physical asset is effectively maintained through the provision of supportive services.

- i.

2. Compensation:

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The Owner will pay the Service Provider a total cost not to exceed \$12,000.00. This cost will be billed to the Owner monthly. This rate of compensation will be inclusive in covering costs of personnel, supplies, travel and any other costs associated with programming as outlined in this agreement.

3. Location of Work:

Service Provider staff will work on and off site to perform their duties. This may include but is not limited to on-site attendance to the issues of individual residents, facilitation of programming and completion of reports as well as off-site visits to community-based service providers. The Service Provider is expected to provide a computer and basic office supplies.

4. Scheduling:

The Service Provider will provide on-site staffing to work at the facility no less than 20 hours per week on a schedule determined by the Owner. If the Service Provider finds it necessary to change on-site staffing during the term of this agreement, the Owner must approve such changes. The Owner and Service Provider will mutually agree on a regular weekly schedule of on-site programming.

5. Terms:

This agreement will be in effect from \_\_\_\_\_ to \_\_\_\_\_. This agreement is not to be renewed or extended except by written agreement signed by both parties on or before April 1, 2012.

6. Termination:

This agreement may be terminated for any reason by either party with a minimum of thirty (30) days notification. The Service Provider will furnish resident records, supportive services files, and outcomes/performance measurement data to the Owner within 30 days of termination of this agreement, and agrees to provide other reasonable transition assistance as needed.

7. Insurance:

The Service Provider shall maintain at its sole expense a valid policy of insurance covering professional liability arising from the acts or omissions of (insert organization), its Owners, and employees in an amount generally considered standard in the Service Provider's profession. The Service Provider shall include the Owner and Facility as additional insured's under this policy. (Insert organization) shall forward a Certificate of Insurance to the Facility upon request and give prompt written notice of any material change in (insert organization)'s coverage.

8.

9. Jurisdiction:

This agreement will be interpreted and controlled pursuant to the laws of the Commonwealth of Pennsylvania.

10. Dispute Resolution:

The Owner and the Service Provider agree to confer in good faith to resolve any problems or disputes that may arise under this agreement.

11. Hold Harmless:

Each party hereby agrees to indemnify, defend and hold harmless the Owner including its Owners, employees, Owners and representatives thereof, from and against any and all liability, damage, cost or expense (including reasonable attorney's fees) arising from a breach in the performance of its obligations hereunder, or as a result of the provision of Services provided hereunder by its personnel or subcontractors.

12. Severability:

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If any part of this Agreement is determined to be illegal, unconstitutional, or otherwise invalid by any Court having jurisdiction hereof, the parties declare it to be their intent that all portions hereof, except as so determined, will be adhered to and legally binding on each of them.

13. Modification:

This agreement may only be modified by written document(s) signed and dated by authorized officers of each of the parties hereto.

WITNESS HEREOF, the parties have caused this Agreement to be executed over the signature of authorized officers of each party, the day and date first above written.

ATTEST:

Property Ownership Entity

\_\_\_\_\_  
Robert Lampher, President;  
Pennrose Management Company, Agent for Owner  
(Insert organization)

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Insert organization) Assignee, Title

\_\_\_\_\_  
Date

Attachments:

(Property Name) Supportive Services Plan  
(Organization) Service Provider Questionnaire

**JOB DESCRIPTION**

**DIRECTOR OF SUPPORTIVE SERVICES.**

**GENERAL DESCRIPTION**

The Director of Supportive Services is responsible for developing, monitoring and overseeing supportive service programs that address social and recreational needs in fulfillment of Pennrose Management. Company's mission of establishing a sense of community and promoting an enhanced quality of living for our residents. Promote and develop PennReach, the non-profit arm of PMC.

**SPECIFIC DUTIES AND RESPONSIBILITIES**

1. Direct supervision of, conducting regular periodic meetings with and ongoing evaluating of supportive service staff, policies and procedures.

Coordinate the development and implementation of supportive service plans and delivery of services at all properties within" the Company's portfolio and their ongoing review and assessment.

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3. Identifying, developing and maintaining networks of existing community based supportive and social service agencies for all properties and dissemination of information to site administrative and supportive services staff.
4. Direct the preparation of supportive service plans for sites under development as part of the funding application process; to include, securing the assistance of existing community based supportive and social service agencies in the delivery of services.
5. After initial marketing and lease-up of new properties is completed, working with Site Manager, Supportive Service Coordinator, community based supportive service and social service agencies, and residents to ensure implementation of services that are needed and desired by the residents. Ensuring that services are consistent with the service plan provided with the funding application(s).
6. Interfacing with and support of President of PMC and Department Heads and ongoing, dialogue in the review, development and implementation of supportive service plan d; policies and procedures in order to: assure that they are at all times current and effective.
7. Seeking out and directing the preparation of grant applications from local, state, federal and private agencies, organizations and foundations to fund service programs; equipment for programs (i.e. computer learning centers), and administrative and overhead costs.
8. Providing technical assistance to residents' councils including organization, training, and identification of program funding availability and program development and implementation.
9. Coordinating activities and communications with Company affiliates as they relate to supportive services, to include Making presentations with respect to new development opportunities and representing Pennrose Management Company on committees and at conferences.
10. Responsibility for monitoring and maintaining compliance of supportive service programs with various funding requirements (e.g. Low Income Housing Tax Credit Program) as it relates to supportive services.
11. Other duties and responsibilities as assigned.

#### SUPERVISION

(The Director of Supportive Services reports directly to the President of Pennrose Management Company- /Management Company with respect to matters directly affecting existing properties and to the President of Pennrose Management Company for all other matters.

#### JOB DESCRIPTION

##### SUPPORTIVE SERVICES COORDINATOR

Senior Communities

##### GENERAL DESCRIPTION

The Supportive Services Coordinator is responsible for developing and implementing supportive service programs that address social and recreational needs in fulfillment of Pennrose Management Company's mission of establishing a sense of community and promoting an enhanced quality of living for our residents.

##### SPECIFIC DUTIES AND RESPONSIBILITIES •

1. Coordinate the implementation supportive services at all assigned properties.
  2. Identify, develop and maintain networks of existing community based supportive and social service agencies for All assigned properties.
  3. Develop a resource directory of providers for us by both management staff and residents.
  4. Provide general case, management (including intake) and referral services to all residents needing assistance. Refer and link residents to service providers and agencies in the general community, organizations will provide services which may include, but are-not limited to: preventative health Screenings; budget counseling & money management ; educational opportunities; leadership development; and other senior services.
-

5. Prepare reports on supportive service activities and serve as a liaison with non-profit partners, the State's Housing Finance Agency; and other governmental/reporting agencies as required.
6. Promote on-site educational events which may include subjects relating to health care, job search seminars (job fairs); and life skills training:
  - Provide technical assistance to residents and resident councils in establishing programs at the Property, development of residents' councils, fundraising; incorporation of Other services as needed.
8. Work closely with management staff to coordinate training of residents in understanding resident and management responsibilities particularly with respect to obligations of tenancy.
9. Set up volunteer support programs with service provider organizations in the community.
10. Improve knowledge and skills through participation in training sessions, annual service coordinator Meetings, staff meetings and other professional development opportunities.
11. Other duties and responsibilities as assigned.

#### SUPERVISION

The Supportive Services Coordinators reports directly to the Management of the Property. He/she is expected to perform the duties of the job following established procedures in accordance with Pennrose Management Company policies and to exercise initiative and independent judgment and to seek advice and assistance for unusual and difficult cases from the Property Manager and Director of Supportive Services: The Supportive Services Coordinator will have on-going interaction with residents, families, staff and community resource personnel.

#### 1. FOSTER LONG-TERM INDEPENDENCE

Critical to continued independent living is ensuring residents have resources available on-site and in the community to foster their independence. To this end, staff will see that such services to include access to basic needs, enrollment in various entitlement programs, aging services, housekeeping assistance, grocery delivery, and access to affordable and reliable transportation are made available to residents. Information, resources and referrals will be provided for services that may include but are not limited to:

- The Area Agency on Aging and/or Center for Independent Living for provision of advocacy and community-based services for older adults and persons with disabilities;
- Potential other providers for personal care, home delivered meals, home support, medical supplies, etc.;
- Referrals to outside agencies utility and rental assistance;
- Information regarding local bus routes, shuttle and train service information; and
- PMC has developed a Housekeeping Handbook to assist residents in affordable approaches to maintaining a safe and clean home.

#### 2. FOSTER HOLISTIC HEALTH AND WELLNESS

Programming will aim to maintain the optimum health of the residents through educational programs, referrals to local health and wellness agencies, preventive health and wellness screenings, fitness and nutrition programs, home health care programs and access to affordable medications and medical supplies. Examples may include:

- Referrals and access to health screenings and clinics such as diabetes and cancer detection, vision screening, blood pressure screening, colorectal cancer, adult flu shots, education, nutrition counseling;
  - Education on and posting of new medical information; and
  - Access to on-site exercise activities.
-

Tab 11.        Budgets

Included in the section is:

- Development Proforma
- 15 yr. operating budget
- Exhibit A Project summary form/Tax credit Equity Summary
- Funding commitment letters from Hudson Housing Capital (Syndicator0 and Councilman Curtis Jones Jr.

<b>Development Financing</b>		
HTF/HOME	0	0.00%
CDBG	2,000,000	13.91%
Limited Partner Equity	11,756,472	81.78%
Deferred Developer's Fee	519,317	3.61%
Other Soft funding: City of Phila NTI	100,000	0.70%
<b>Total Financing</b>	<b>\$ 14,375,789</b>	<b>100.00%</b>

<b>PRA Maximum Rates</b>	
50% or \$1.5 million	

<b>Development Costs</b>		
<u>Construction Costs</u>		
General Requirements	\$ 510,600	
Site Improvements	0	
Structures	8,510,000	
Bond Premium	97,422	
Builders Profit & Overhead	721,648	
Construction Contingency	296,690	2.98%
Other: Surveillance	40,000	
Other: Solar Installation	75,000	
<b>Total Construction Costs</b>	<b>\$ 10,251,361</b>	
<u>Soft Costs</u>		
Architectural - Design	\$ 413,387	
Architectural - Supervision	82,667	
Architectural Reimbursables	55,118	
HERS/LEED - MaGrann	30,000	
Engineering Fees	95,000	
Geotech	20,000	
Survey	20,000	
Construction Management (IS)	90,000	
Soil Borings/Structural Report	0	
Environmental Phase I & II	15,000	
Radon Testing	10,000	
Remediation (EHS)	300,000	
Utility Connection Fees	68,439	
Legal - Development	40,000	
Legal - Development (Local)	30,000	
Permits	50,000	
Market Study/Appraisal	7,000	
Accounting Cost Certification	15,000	
Title & Recording	87,000	
Builders Risk Insurance	46,569	
Other: FF&E (1000/unit)	50,000	
Other: RDA Arts Program (1% of Construction)	98,897	
Tax Credit Application Fee	2,500	
Agency Inspection Fees/construction servicing	40,000	
Points on construction loan	33,000	
Bank Legal fees	50,000	
Bank Appraisal	9,000	
Bank Inspection fees	18,000	
Syndicator Due Diligence	45,000	
Marketing Lease -up	60,000	
Lease-up	0	
Start-up	0	
Insurance	0	
Real Estate Taxes	0	
Land Acquisition	1,000	
Zoning	0	
<b>Soft Costs Subtotal</b>	<b>\$ 1,882,577</b>	
<u>Financing fees</u>		
PHFA Fees	\$ 29,000	
PHFA Closing	5,000	
Tax Credit Allocation Fee	72,000	
Loan Fees -	0	
<b>Financing Fees Subtotal</b>	<b>\$ 106,000</b>	
<b>Total Soft Costs</b>	<b>\$ 1,988,577</b>	

<b>PRA Maximum Rates</b>	
2.5% (nc)/5.0%(rehab) - 10.0%	
\$ 365,205	over budget
\$ 121,735	ok
\$ 40,000	ok
\$ 2,447,987	ok

Property Acquisition	\$	-	
<b>Total Replacement Costs</b>	\$	12,239,937	
<b>Reserves</b>			
Operating Reserve	\$	169,874	
Tax & Insurance Escrow		27,119	
Social Service Reserve		150,000	
Transition Reserve		0	
Other- PHFA Development Contingency		0	
<b>Reserves Subtotal</b>	\$	346,993	
<b>Total Replacement Costs Plus Reserves</b>	\$	12,586,930	
<b>Developer's Fee</b>	\$	1,500,000	
<b>Syndication Fees</b>			
Legal	\$	30,000	
Accounting		19,390	
Bridge Loan Interest		185,469	
Compliance Monitoring		0	
<b>Syndication Fees Subtotal</b>	\$	234,859	
<b>Total Development Costs</b>	\$	<u>14,321,789</u>	<b>54000</b>

<b>PRA</b>
\$ 1,223,994
\$ 40,000
\$ 225

#REF!

Total Units	50
Total Sq. Ft.	55,000

	per unit	per sq ft
Total Construction Costs	\$ 205,027	\$ 186
Total Replacement Costs	\$ 244,799	\$ 223
Total Development Costs	\$ 286,436	\$ 260
Replacement Cost + Dev Fee	274798.746	\$ 250

Cost Analysis--Elevator Buildings (for Non-Elevator, see below)					
Proposed Unit Mix					Blended per Unit Cost Allowable
0 Bdrm	0	units @	\$ 179,298	per unit	\$ -
1 Bdrm	45	units @	\$ 205,540	per unit	\$ 9,249,300
2 Bdrm	5	units @	\$ 249,934	per unit	\$ 1,249,670
3 Bdrm	0	units @	\$ 323,333	per unit	\$ -
4 Bdrm	0	units @	\$ 354,919	per unit	\$ -
Totals	50				\$ 10,498,970
<b>Cost per Unit Allowable</b>			\$ 209,979	per unit	
<b>Cost per Unit for Project</b>			\$ 244,799	per unit	Not Allowable
					Waiver Required? YES
<b>Cost per Square Foot Allowable</b>			\$ 225	psf	
<b>Cost per Sq. Ft. for Project</b>			\$ 250	psf	Not Allowable
		120% of 221(d) limit:		116.58%	

<b>HOME Maximum Subsidy</b>				
Maximum 221(d) 3 limit	\$	209,979	per unit	allowable
OHCD HOME Funding	\$	-	per unit	

Developer's Fee Analysis/Maximum Developer's Fee Allowable for Project					
Total Replacement Cost	\$	12,239,937			
less acquisition costs		-			
Basis for Developer's Fee ==>	\$	12,239,937			
<b>Total Fee Allowable</b>	\$	1,223,994			
<b>Developer Fee for Project</b>	\$	1,500,000	Allowable		Waiver Required? NO
less reinvested dev. Fee	\$	(519,317)			
<b>Net Developer's Fee for Project</b>	\$	980,683			
	\$	243,311			

Scope of Construction: NC Elevator in Building? Yes  
(rehab or nc) (yes or no)

Reviewed and confirmed by: [Signature] Date: 11/18/14

If your project is a Non-Elevator Building, please cut and paste the below 221(d) limits into cells D96 through D 100:

\$	170,378
\$	196,447
\$	236,922
\$	303,268
\$	337,852



**TAX CREDIT Equity Summary**

Project Name	Wynne Senior Residences
Developer Name	Pennrose Properties
Total Development Cost	\$ 14,375,789
Total City Funds Requested (HTF+CDBG+HOME)	\$ 2,100,000

(Note: Above number includes \$100k in Philadelphia NTI funds)

Low Income Housing Tax Credit Information:

Total Tax Credits Being Requested from PHFA	\$ 12,000,000
Total Equity Raised from Sale of LIHTC	\$ 11,756,472
Equity Raise Expressed as Cents on Dollar	0.98
Tax Credit Investor if Identified	Hudson Housing Capital

Historic Preservation Tax Credit Information:

Total Historic Tax Credits Being Requested	0
Total Equity Raised from Sale of Historic Credits	0
Equity Raise Expressed as Cents on Dollar	N/A
Tax Credit Investor	N/A

Assumptions

Rental Income		Unit Distribution		Rents		Utility Allowance		Total Housing Costs	
Type		<=20%	50%<=60%	<=20%	50%<=60%	<=20%	50%<=60%	<=20%	50%<=60%
0 Bdr	0	0	0	\$ 700	\$ 887	\$ 142	\$ 142	\$ 842	\$ 881
1 Bdr	5	20	45	\$ -	\$ 1,065	\$ -	\$ 179	\$ -	\$ -
2 Bdr	0	5	5	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
3 Bdr	0	0	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
4 Bdr	0	0	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	5	20	50						
% of Units	10%	40%	100%						
				<b>Total</b>	<b>\$ 41,345</b>				

Trending Assumptions

Income	2.0%
Expenses	3.0%
Vacancy	7.0%
Management Fee	8.0%

Income from Operations

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Gross Rental Income	\$ 390,240	\$ 398,045	\$ 406,006	\$ 414,126	\$ 422,408	\$ 430,856	\$ 439,474	\$ 448,263	\$ 457,228	\$ 466,373	\$ 475,700	\$ 485,214	\$ 494,919	\$ 504,817	\$ 514,913
Bad Debt	\$ 5,854	\$ 6,029	\$ 6,210	\$ 6,396	\$ 6,588	\$ 6,786	\$ 6,990	\$ 7,199	\$ 7,415	\$ 7,638	\$ 7,867	\$ 8,103	\$ 8,346	\$ 8,596	\$ 8,854
Vacancy	29,207	30,083	30,985	31,915	32,873	33,859	34,874	35,921	36,998	38,108	39,251	40,429	41,642	42,891	44,178
<b>NET RENTAL INCOME</b>	<b>\$ 355,180</b>	<b>\$ 361,933</b>	<b>\$ 368,810</b>	<b>\$ 375,814</b>	<b>\$ 382,948</b>	<b>\$ 390,212</b>	<b>\$ 397,610</b>	<b>\$ 405,143</b>	<b>\$ 412,815</b>	<b>\$ 420,627</b>	<b>\$ 428,582</b>	<b>\$ 436,683</b>	<b>\$ 444,931</b>	<b>\$ 453,330</b>	<b>\$ 461,881</b>

Rental/Operating Subsidy (ACC)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Other Income - Laundry	\$ 27,000	\$ 27,540	\$ 28,091	\$ 28,653	\$ 29,226	\$ 29,810	\$ 30,406	\$ 31,015	\$ 31,635	\$ 32,267	\$ 32,913	\$ 33,571	\$ 34,243	\$ 34,927	\$ 35,626
<b>EFFECTIVE GROSS INCOME</b>	<b>\$ 383,380</b>	<b>\$ 390,697</b>	<b>\$ 398,149</b>	<b>\$ 405,740</b>	<b>\$ 413,472</b>	<b>\$ 421,347</b>	<b>\$ 429,367</b>	<b>\$ 437,536</b>	<b>\$ 445,856</b>	<b>\$ 454,329</b>	<b>\$ 462,958</b>	<b>\$ 471,746</b>	<b>\$ 480,695</b>	<b>\$ 489,809</b>	<b>\$ 499,091</b>

Operating Expenses

Administrative Expense	52,948	54,536	56,172	57,857	59,593	61,381	63,222	65,119	67,072	69,085	71,157	73,292	75,491	77,755	80,088
Advertising and Marketing	2,790	2,874	2,960	3,049	3,140	3,234	3,331	3,431	3,534	3,640	3,750	3,862	3,978	4,097	4,220
Utilities	55,473	57,138	58,852	60,617	62,436	64,309	66,238	68,225	70,272	72,380	74,552	76,788	79,092	81,465	83,908
Operating & Maintenance	43,907	45,224	46,581	47,979	49,418	50,900	52,427	54,000	55,620	57,289	59,008	60,778	62,601	64,479	66,414
Water/Sewer	121,826	125,481	129,245	133,123	137,116	141,230	145,467	149,831	154,326	158,955	163,724	168,636	173,695	178,906	184,273
Payroll Expense	43,719	45,031	46,381	47,773	49,206	50,682	52,203	53,769	55,382	57,043	58,755	60,517	62,333	64,203	66,129
License and Permits	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Property Taxes & Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Investor Management Fee	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Replacement Reserve	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL EXPENSES</b>	<b>\$ 320,663</b>	<b>\$ 330,283</b>	<b>\$ 340,192</b>	<b>\$ 350,397</b>	<b>\$ 360,909</b>	<b>\$ 371,737</b>	<b>\$ 382,889</b>	<b>\$ 394,375</b>	<b>\$ 406,207</b>	<b>\$ 418,393</b>	<b>\$ 430,945</b>	<b>\$ 443,873</b>	<b>\$ 457,189</b>	<b>\$ 470,905</b>	<b>\$ 485,032</b>

NET OPERATING INCOME

Debt Service	\$ 62,716	\$ 60,413	\$ 57,958	\$ 55,343	\$ 52,563	\$ 49,610	\$ 46,479	\$ 43,161	\$ 39,649	\$ 35,936	\$ 32,013	\$ 27,873	\$ 23,506	\$ 18,905	\$ 14,059
<b>Cash Flow after Debt Service</b>	<b>\$ -</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>

Cash Flow after Debt Service

Supportive Service	8,750	9,013	9,283	9,561	9,848	10,144	10,448	10,761	11,084	11,417	11,759	12,112	12,475	12,850	13,235
Reserves and Escrows	\$ 53,966	\$ 51,401	\$ 48,675	\$ 45,782	\$ 42,715	\$ 39,467	\$ 36,031	\$ 32,399	\$ 28,565	\$ 24,519	\$ 20,254	\$ 15,761	\$ 11,031	\$ 6,055	\$ 824
<b>Cash Flow After Supp Services</b>	<b>\$ -</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>

## LIHTC RENTAL PROJECT SUMMARY FORM

**Developer Information**

Developer Name Pennrose Development, LLC		Contact Person Harry D. Moody	
Street Address 1301 N. 13 <sup>th</sup> Street		City, State, Zip Philadelphia, PA 19121	
Telephone 267-386-8664 (O) 267-259-3823 (c)	Fax 267-386-8646	Email hmoody@pennrose.com	
Developer is: <input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Nonprofit <input type="checkbox"/> Nonprofit-Controlled Partnership (Describe):			

**Project Information**

Project Name: <u>Wynne Senior Residences</u>	<input checked="" type="checkbox"/> New project	<input type="checkbox"/> Expansion of existing project
Construction type: <input checked="" type="checkbox"/> New Construction	<input type="checkbox"/> Rehabilitation	<input type="checkbox"/> Both New and Rehab
Identify special needs population(s) (if any) proposed to be served: <u>N/A</u>		
Identify project neighborhood(s) location: <u>Wynnefield, Philadelphia</u>		

**Site Information** (continue on separate sheet if necessary)

Property Address	Occupied or Vacant	Structure or Lot	Council District	Census Tract	Owner of Record <i>Name and Address</i>	Acquisition Method
2001-11 N. 54 <sup>th</sup> Street	Vacant	Structure	4th	119	PRA	Conveyed by PRA

**Development Activity**

	Number of Units to be Developed						
	TOTAL	SRO/Effic.	1 Bedrm.	2 Bedrm.	3 Bedrm.	4 Bedrm.	4+ (specify size)
Rehabilitation	0	0	0	0	0	0	0
New construction	50	0	45	5	0	0	0

**Funding Request**

	CDBG	HOME	HTF		
City Funds Requested:	2,000,000	0	0	Total HTF Units:	0
HTF Funds Expected To Serve <30% AMI:			N/A	HTF Units to Serve <30% of AMI:	N/A

## LIHTC RENTAL PROJECT SUMMARY FORM

## Project Summary

Total Number of Units:	50
No. of Accessible Units (Mobility):	6
No. of Accessible Units (Sensory):	3
No. of Visitable Units:	50
Total Project Development Cost:	14,331,472
Total City Funds Requested:	2,000,000
Leveraging Ratio ((TDC-City Subsidy)/City Subsidy):	6.17

**TAX CREDIT Equity Summary**

Project Name	Wynne Senior Residences
Developer Name	Pennrose Properties
Total Development Cost	\$ 14,331,472
Total City Funds Requested (HTF+CDBG+HOME)	\$ 2,100,000

(Note: Above number includes \$100k in Philadelphia NTI funds)

Low Income Housing Tax Credit Information:

Total Tax Credits Being Requested from PHFA	\$ 12,000,000
Total Equity Raised from Sale of LIHTC	\$ 11,642,282
Equity Raise Expressed as Cents on Dollar	0.98
Tax Credit Investor if Identified	Hudson Housing Capital

Historic Preservation Tax Credit Information:

Total Historic Tax Credits Being Requested	0
Total Equity Raised from Sale of Historic Credits	0
Equity Raise Expressed as Cents on Dollar	N/A
Tax Credit Investor	N/A



CITY OF PHILADELPHIA  
CITY COUNCIL

CURTIS JONES, JR.  
ROOM 404, CITY HALL  
PHILADELPHIA, PA 19107  
(215) 686-3416 or 3417  
Fax No. (215) 686-1934

COUNCILMAN - 4TH DISTRICT  
MAJORITY LEADER

COMMITTEES

Chairman  
Committee on Public Safety

Vice Chair  
Committee of the Whole Council  
Committee on Appropriations  
Committee on Parks, Recreation  
& Cultural Affairs

Member  
All Committees

Mr. Brian Hudson  
Executive Director and CEO  
Pennsylvania Housing Finance Agency 211 North Front Street  
Harrisburg, PA 17101-1406

November 13, 2014

Re: Wynne Senior Apartments Tax Credit

Application Dear Mr. Hudson,

Please let this letter serve as my support for the Pennrose LLC/Wynnefield Revitalization Corporation 9% Low Income Housing tax credit application for the redevelopment of the historic Wynne Ballroom, located at 2001 North 54<sup>th</sup> Street into the Wynne Senior Apartments, a 54-unit senior housing development.

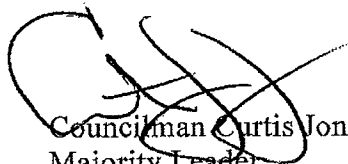
This project will provide much needed senior housing for Wynnefield, a community where the majority of the residents are elderly and seeking senior housing opportunities. This development will also provide much needed community and retail space. I am committing \$100,000.00 in Neighborhood Transformation Initiative (NTI) funds to the project, dependent upon the award of tax credits.

The redevelopment of the Wynne Ballroom will be the anchor project at the top end of 54<sup>th</sup> Street and an integral part of the revitalization of this Commercial Corridor. This will be one of a number of necessary major improvements along this corridor. In November 2013, Presby's Inspired Life started construction of a \$12 million dollar project to construct 48 subsidized senior housing units with completion in December, 2014 and will serve as the other anchor at the bottom of the 54<sup>th</sup> Street corridor. The Wynnefield Overbrook Revitalization Corporation has obtained multiple grants for business facade improvements and banners along 54<sup>th</sup> Street. My office in collaboration with City of Philadelphia Commerce Department, Streets Department, and the Southeastern

Transportation Authority have collaborated to install big belly trash compactors, bump outs, bus shelters, tree plantings and street repaving along the corridor as well. And finally, a \$500,000.00 renovation of Triangle Park, which is directly behind the Presby's Inspired Life project, was completed and opened in the summer of 2014. The combination of these projects and the redevelopment of the Wynne Ballroom, will positively changes the dynamic of 54<sup>th</sup> Street,

The redevelopment of the Wynne Ballroom will be the capstone project for the historic 54<sup>th</sup> Street Corridor and will bring much needed senior housing and economic opportunity to the area. My office, along with others, have not only "talked the talk but walked the walk" by making major investments in the revitalization of this area. The redevelopment of the Wynne Ballroom is an integral part which would continue the revitalization and also provide additional needed affordable senior housing to the aging population in my district. Therefore, I strongly support this project and appreciate your consideration of the Pennrose/Wynnefield Overbrook Revitalization Corporation 9% Tax Credit application.

If you have any questions or concerns, please contact me at 215-686-3416.



Councilman Curtis Jones, Jr.  
Majority Leader  
4<sup>th</sup> Council District  
Room 404, City Hall  
Philadelphia, PA

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# HUDSON

## HOUSING CAPITAL

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November 17, 2014

Richard K. Barnhart  
Chairman and CEO  
Pennrose Properties, LLC  
One Brewery Park  
1301 North 31st Street  
Philadelphia, PA 19121-4495

Re: Wynne Senior Residence, Philadelphia, Pennsylvania

Dear Rich:

Thank you for providing Hudson Housing Capital LLC ("Hudson") with the opportunity to extend a purchase offer for the investment member interest in the Limited Partnership that will own Wynne Senior Residence LP (the "Partnership").

Hudson is a Delaware limited liability company formed to directly acquire Investor Membership interests in limited liability companies and limited partnership interests in partnerships which own apartment complexes qualifying for low-income housing tax credits ("Tax Credits") under Section 42 of the Internal Revenue Code of 1986, as amended (the "Code").

Set forth is our proposal as to the basic business terms under which Hudson or its designee ("Investor") will acquire a 99.00% limited member interest in the Partnership (the "Partnership"), which will own a 50-unit complex in Wynnefield section of West Philadelphia, PA (the "Property"). Wynnefield-Overbrook Revitalization Corp. The General Partner will be Pennrose GP, LLC. Additionally, Pennrose Properties, LLC, (the "Developer") will be the developer of the Property. Pennrose Properties, LLC, and Pennrose Development, LLC (the "Guarantors"), will jointly and severally guarantee the obligations of the General Partner. Pennrose Properties, LLC and Pennrose Development, LLC shall be required to maintain, in the aggregate a net worth of \$5,000,000 and minimum liquidity of \$1,000,000. An affiliate of the Investor will be admitted to the Partnership as a special limited member (the "SLP") with limited supervisory rights.

You have advised us that the Property expects to receive an allocation of 9% Tax Credits in the annual amount of \$1,200,000 and that all 50 of the units will qualify for Tax Credits.



**I. Equity Investment**

Assuming a closing no later than December 15, 2015 the Investor will contribute to the Partnership a total of \$11,756,472 (the "Total Equity"), or \$0.98 (the "Tax Credit Ratio") per Tax Credit available to the Investor, payable in the following installments:

<b>Contribution</b>	<b>Contribution %</b>	<b>Timing</b>
First	80%	Closing and through construction
Second	10%	Construction Completion
Third	5%	Breakeven
Fourth	5%	8609s

- a. ***First Capital Contribution.*** The Investor will fund the First Capital Contribution at closing and through construction:

<b>Amount</b>	<b>Timing</b>
20%	At Closing
20%	Later of 25% Completion and April 1, 2016
20%	Later of 50% Completion and July 1, 2016
25%	Later of 75% Completion and October 1, 2016

- b. ***Second Capital Contribution.*** The Second Capital Contribution will be paid upon later of July 1, 2016 and the satisfaction of the conditions set forth in the Partnership Agreement, which are principally as follows: (i) lien-free construction completion of the Property substantially in accordance with the Plans and Specifications in a workmanlike manner approved by Hudson; (ii) issuance of Certificates of Occupancy for 100% of the units in the Property or Temporary Certificate of Occupancy provided there is a hold back for 110% of the punch list items; (iii) receipt of a pay-off letter from the general contractor; (iv) if not received at the time of initial closing, a carryover allocation for the Property; (v) Guarantor satisfying liquidity and net worth requirements; (vi) receipt of prior year's income tax returns in the event such returns are then due; and (vii) receipt of an unaudited cost certification from the General Partner.

- d. ***Third Capital Contribution.*** The Third Capital Contribution will be paid upon satisfaction of the conditions set forth in the Partnership Agreement, which are principally as follows: (i) receipt of final Tax Credit cost certification from independent accountants to the Partnership (the "Accountants") as to the amount of Tax Credits the Partnership will claim for 2016/2017 and the amount allocable to

each member (the "Final Certification"); (ii) receipt of prior year's income tax returns in the event such returns are then due and not on extension; (iii) qualification of 100% of the set-aside apartment units in the Property for Tax Credits; (iv) issuance of Permanent Certificates of Occupancy for all buildings; (v) Guarantor satisfying liquidity and net worth requirements; (vi) receipt of prior year's income tax returns in the event such returns are then due; and (vii) achievement of Breakeven level for three consecutive months (the "Breakeven Date").

"Breakeven" shall mean that, for each such month, occupancy is at least 95% and that Property income (with rents not to exceed maximum allowed tax credit rents net of the applicable utility allowances) meets or exceeds the greater of underwritten expenses or actual expenses including replacement reserves, reassessed taxes (calculated on a stabilized and accrual basis) and generates an income to expense ratio of 1.0 assuming the greater of the actual vacancy rate or 5%.

- e. ***Fourth Capital Contribution.*** The Fourth Capital Contribution will be paid upon satisfaction of the conditions set forth in the Partnership Agreement, which are principally as follows: (i) receipt of Form 8609 with respect to all buildings constituting the Property; and (ii) receipt of a tax return and an audited financial statement for the year in which the Breakeven Date occurred.

In the event such tax return and audited financial statement are not due at such time, \$15,000 of the Fourth Capital Contribution shall be held back and released upon receipt of such items.

Our offer is also contingent on the following financing sources and assumptions:

- a. Construction Period Loan of approximately \$3,300,000 or such greater amount to balance the sources and uses through construction;
- b. Loan from City of Philadelphia Office of Housing and Community Development CDBG funds in the amount of \$2,000,000 with a fixed interest rate of zero percent (0%) a 40 year term and no payments due until maturity;
- c. Loan from City of Philadelphia NITI funds in the amount of \$100,000 with a fixed interest rate of zero percent (0%) a 40 year term and no payments due until maturity;
- d. Receipt of commitment of ACC subsidy for 5 of the 50 units;
- e. Our pricing assumes that real property will be depreciated over 27.5 years.

## ***II. Developer Fee***

The Developer shall receive a Developer Fee of \$1,500,000 which shall be paid as follows: i) 30% of the estimated Cash Developer Fee (i.e. the non-deferred portion of the Developer Fee) shall be paid at closing; ii) 60% of the Cash Developer Fee (as recalculated at

such time) less amounts previously paid, shall be paid at the time of the Second Capital Contribution; and iii) the balance shall be paid from the Third and Fourth Capital Contribution to the extent funds are available.

You have represented that the amount of the Developer Fee does not exceed the amount permitted to be paid by the tax credit allocating agency. Deferred developer fees shall be paid from available cash flow as detailed in Section V and shall not bear interest. Principal payments on the deferred developer fees shall commence with the funding of the Third Capital Contribution. The General Partner agrees to make a special capital contribution to the Partnership equal to any unpaid balance of the deferred portion of the Developer Fee if such portion has not been fully paid within 15 years from the date of the payment of the Second Capital Contribution. If such payments are necessary, General Partner will be allocated an equal amount of the losses.

***III. Property Management Fee***

The General Partner may retain one of its affiliates to be the managing agent for the Property on commercially reasonable terms. The management agreement, to be approved by the Investor, shall have an initial term of 1 year and shall be renewable annually thereafter, shall provide for an annual management fee not to exceed 8% of gross effective income, and shall otherwise be on commercially reasonable terms (including a termination right by the General Partner in the event of fraud/gross negligence or material default by the managing agent). If the managing agent is affiliated with the General Partner, the management agreement shall provide for a deferral of the management fee in the event that the property does not generate positive Cash Flow.

***IV. Reserved***

***V. Cash Flow Distributions***

Cash flow from the Property, after payment of operating expenses (including any current and deferred property management fees from prior years, debt service), replenishment of required reserves (including any reserve payments which were not made due to insufficient cash flow) and payment of any tax liability incurred by the Investor Member ("Cash Flow"), shall be distributed annually (subsequent to the Breakeven Date) as follows:

- a. to maintain the Minimum Balance in the Operating Reserve;
- b. to payment of any amounts owed to the Investor Member;
- c. to payment of any Operating Deficit Loans, if any;
- d. to the Developer Fees until paid in full;
- e. 90% of Cash Flow after V(d). to the General Partner as a preferred return with an equivalent allocation of income;
- f. and the remainder to be split in accordance with Partnership interests.

**VI. Sale or Refinancing Proceeds**

Net sale or refinancing proceeds (i.e., after payment of, outstanding debts, liabilities other than to the General Partner and its affiliates and expenses of the Partnership and establishment of necessary reserves) shall be distributed as follows:

- a. Repayment of outstanding loans by the Investor Members, if any;
- b. Payment of amounts due to the Investor Members under the Tax Credit Adjuster;
- c. Repayment of outstanding loans by the General Partner and Operating Deficit loans; and
- d. 10% to the Investor and 90% to the General Partner, less any amounts paid as Developer Fee from sale or refinancing proceeds.

**Option**

The General Partner shall have a non-assignable option, for a period of eighteen months subsequent to the expiration of the compliance period, to purchase the Property for the greater of (a) the fair market value of the Property; and (b) the outstanding debt plus all exit taxes to the Investor Members and any other monies owed to the Investor Members. This provision shall be unenforceable in the event the General Partner is in default under the terms of the Partnership Agreement and shall terminate in the event of a removal of the General Partner.

**Right of First Refusal**

A qualified non-profit corporation designated by the General Partner shall have a right of first refusal as allowed under Section 42, commencing upon the expiration of the tax credit compliance period continuing for 18 months to exercise its Right of First Refusal, to purchase the Project or the limited partner's interest for the outstanding debt plus all exit taxes of the limited partners and any other monies due the Limited Partner.

**VII. General Partner Commitments**

- a. ***Low Income Housing Tax Credit Adjustment.*** Our offer is based upon the assumption that the Partnership will qualify for and claim \$832,000 in 2017, the full amount of the Partnership's Tax Credit allocation, \$1,200,000 for each year from 2018 through 2026, and \$368,000 in 2027.

**(i) Adjustments during equity payment (construction and lease-up) period**

In the event that either the Form 8609's or the Final Certification indicate that the Property will not generate the projected aggregate amount of Tax Credits (other than as specified below), the Partnership Agreement will provide for a return of such capital, an adjustment in the amount of any unpaid Capital Contributions and/or a payment by the General Partner to the Investor, sufficient to restore the Tax Credit Ratio as defined above.

Notwithstanding the preceding paragraph, in the event that the Final Certification specifies that, while the aggregate amount of Tax Credit allocable to the Partnership is unchanged, the amount of Tax Credits allocable to the Partnership in 2016/2017 is less than the amounts specified above for the corresponding years, the Third Capital Contribution will be reduced by \$0.75 for each dollar by which such amounts exceed the amount of Tax Credits allocable to the Partnership for such period.

In the event that the amount of Tax Credits allocable to the Partnership in 2015 is more than the amounts specified in the first paragraph of Section VII.a. herein for the corresponding year, the Total Equity shall be increased by an amount equal to \$0.65 for each dollar by which such amounts are less than the amount of actual Tax Credits allocated to the Partnership for such period but in no event shall the increased equity price be in excess of an increase of \$300,000. If the Investor chooses not to purchase additional credits in an amount which would be greater than \$300,000, the Investor's interest will be reduced prorata with the credits purchased and the total credits available.

**(ii) Adjustments during compliance period**

After the Form 8609's have been issued, in the event that the actual amount of Tax Credits which may be claimed by the Partnership is less than the amount specified in such Forms, the General Partner shall reimburse the Investor for each lost dollar of Tax Credits, on a dollar-for-dollar basis. Similarly, if there is a recapture of Tax Credits (except from the sale or transfer of the Investor's interest in the Partnership, or due to a change of applicable tax law), the General Partner shall upon demand indemnify the Investor and its partners against any Tax Credit recapture liability (including interest, penalties and any reasonable related legal or accounting costs) which they may incur during the Compliance Period. Any such amounts due to the Investor from the General Partner under all tax credit adjuster provisions shall, if unpaid, be deemed to be a loan (the "Tax Credit Adjuster Loan") from the Special Limited Member and shall bear interest at Prime + 2% per annum. However, the Investor will still retain the right to remove the General Partner for any adjuster amount due and not paid immediately. Principal and interest payments on the Tax Credit Adjuster Loan shall be made from Cash Flow and Sale or Refinancing Proceeds as described in Sections V and VI.

Tax Credit Recapture shall be governed by the Orchard Ridge provisions.

- b. ***Development Deficit Guarantee.*** The General Partner shall be responsible for completion of the Property in a workmanlike manner, in accordance with approved plans and specifications, free and clear of all liens. To the extent that the costs of construction and operations until the Breakeven Date exceed the amount of any funding by approved permanent third party lenders, any unpaid Developer Fees and the amount of the Investor's capital commitment (adjusted as set forth above), the General Partner shall pay all such costs and expenses connected with development and construction of the Property, including all operating expenses of the Property until the Breakeven Date has been achieved. The contractor will be required to provide a payment and performance bond or 15% letter of credit. Additionally an "owner's" construction contingency in an amount equal to 5% of the construction contract amount shall be included in the development budget and shall be outside of the contractor's control.
- c. ***Operating Deficit Guarantee, Operating Reserve, Internal Operating Subsidy and ACC Reserve.*** The General Partner shall make interest free loans to the Partnership (repayable from cash flow and/or sale and refinancing proceeds as described above) equal to any Operating Deficits (including the Minimum Deposit described in VII f. below) incurred during the period beginning on the Breakeven Date and ending on the third anniversary of Breakeven Operations, in an amount not to exceed 12 months of underwritten operating expenses (including deposits to the replacement reserve).

An operating reserve (the "Operating Reserve") in an amount equal to 6 months of underwritten operating expenses and debt service (the "Minimum Balance") shall be funded at the time of the Third Capital Contribution. The Operating Reserve shall be maintained for the duration of the compliance period and any draws from this Reserve shall require the consent of the SLP and shall be replenished from Cash Flow up to the Minimum Balance. Funds in excess of the Minimum Reserve may be withdrawn from the Operating Reserve during the Operating Deficit Guaranty Period to cover operating deficits.

An internal operating subsidy ("IOS") shall be established at the time of the Third Capital Contribution in an amount equal to the projected cash shortfalls assuming initial Breakeven operations and trending income at 2% and expenses at 3%.

Release of funds from the IOS shall be restricted as follows:

- i) No Releases will be allowed from the Operating Reserve during the Operating Deficit Guarantee Period
- ii) Draws from the Operating Reserve shall be replenished from operations as priority funding over payment of debt service on any soft debt and any fee payments to the Developer.

Additionally an ACC Reserve in the amount of one year of projected ACC Subsidy and a Supportive Housing Reserve in the amount of \$150,000 shall be funded at the time of the Third Capital Contribution.

- e. ***Obligations of General Partner.*** Immediately following the occurrence of any of the following events, (x) the General Partner shall admit the Special Limited Partner or its designee as the General Partner of the Partnership and, at the option of the Investor, withdraw from the Partnership; or, (y) at the option of the Investor with respect to any of the events described in clauses (i) through (vii) below, repurchase the Investor's interest in the Partnership: (i) an IRS Form 8609 is not issued with respect to each of the buildings in the Property in a timely manner after each such building has been placed in service; (ii) the Property is not fully placed in service by September 30, 2016 assuming a March 2015 closing date; (iii) Achievement of Breakeven is specifically not a condition for Repurchase; (iv) the Partnership fails to meet the minimum set aside test (as defined in Section 42 of the Code) or fails to execute and record a Tax Credit Extended Use Commitment by the close of the first year of the Credit Period; (v) the Partnership shall have been declared in default by any mortgage lender or under the tax credit allocation or foreclosure proceedings have been commenced against the Property and such default is not cured or such proceeding is not dismissed within 30 days; or (vi) there is a material violation of the Partnership Agreement by the General Partner or if the property manager is an affiliate of the General Partner, a material violation of the management agreement by the manager which causes material adverse harm to the Investor, the Partnership or the Property.

If the Investor elects to have its interest repurchased by the General Partner, the repurchase price shall be equal to 105% of the Total Equity plus interest at Prime + 1% plus any tax liability incurred by the investor as a result of such repurchase, less any amounts of the Total Equity not funded to date.

- f. ***Replacement Reserve.*** Commencing with the month following Completion, the Partnership will make a minimum monthly replacement reserve deposit (the "Minimum Deposit") equal to (on an annualized basis) the greater of (i) \$300 per unit; and (ii) the amount required by the permanent lender. Any interest earned on funds in the replacement reserve account shall become a part thereof.
- g. ***Reporting.*** The Partnership will be required to furnish Investor with (a) quarterly unaudited financial statements within 45 days after the end of each quarter of the fiscal year; (b) annual audited financial statements within 90 days after the end of each fiscal year; (c) an annual budget for each fiscal year of the Partnership, not later than November 1 of the preceding year; and (d) the Partnership's tax returns and K-1 forms within 45 days after the end of each fiscal year. The penalty for any failure to deliver Partnership tax returns or K-1 forms prior to the specified deadline shall be (i) \$50 per day for the first seven days after such deadline, (ii)

\$100 per day for the next seven days and (iii) \$150 per day thereafter, provided that the amount of such penalty shall not exceed \$1,500 in any year.

**VIII. Representations, Warranties and Covenants**

The General Partner shall make certain representations and warranties as to the Partnership, the General Partner and the Property to be set forth in the Partnership Agreement.

**IX. Accountants**

The Accountants for the Partnership shall be CohnReznick Group or another firm approved by the Investor. The Accountants shall prepare tax and financial reports as set forth in the Partnership Agreement, and the Final Certification referred to in I.c., above.

**X. Investment Member Rights**

The Partnership Agreement will provide certain approval rights as to major actions proposed to be taken by the General Partner. The Investor shall have the right to remove the General Partner and the Manager for cause.

**XI. Insurance**

At the closing, the General Partner shall provide for title insurance satisfactory to counsel to the Investor in an amount equal to the sum of all Capital Contributions, all mortgage loans and the amount of any Development Fee Note. Prior to the payment of any additional installment of the Capital Contribution, a "date down" of such policy shall be provided. The General Partner shall provide for (i) liability (general and excess) insurance in an amount of at least \$6,000,000 (increased biennially by the CPI Percentage), (ii) hazard insurance (including boiler and machinery coverage) and flood insurance (to the extent that the property is in a 100 year flood zone) in an amount of not less than the full replacement value of the Property, (iii) rental loss insurance for a period of 12 months after the date of loss and (iv) law and ordinance coverage with no sublimit, including changes in law and ordinances enacted during the course of reconstruction. Builder's risk insurance shall be provided during construction. Architects shall submit evidence of errors and omissions coverage, in amounts reasonably satisfactory to the Investor. Workers compensation insurance shall be provided as to any entity with employees working at the Property. All policies shall name the Investor as an additional insured and shall otherwise be subject to Investor approval.

**XII. Indemnity Agreement**

The General Partner shall indemnify the Investor, Hudson and its affiliates, and their respective officers, directors for any untrue statement of a material fact or omission to state a material fact necessary to make any such statement, in light of the circumstances under which they were made, not misleading, by the General Partner or its agents set forth in any document delivered by the General Partner or its agents in connection with the acquisition of the Property, the investment by the Investor in the Partnership and the execution of the Partnership Agreement.



***XIII. General Conditions***

Payment of the Second/Third/Fourth Capital Contributions shall be conditioned upon completion of an appropriate due diligence review by the Investor to confirm that there have been no changes in material circumstances affecting the Property, including (i) receipt of estoppel letter(s) from all lenders, (ii) review of title (including a "date-down" search), survey, environmental and other legal and regulatory matters, and (iii) certification by the General Partner as to the continued accuracy of representations and warranties made in the Partnership Agreement.

***XIV. Right of First Refusal***

The General Partner and Developer shall grant Hudson a right to match the best offer, within 10 days, to purchase any Tax Credits and provide construction financing on any subsequent phase of the Property which may be developed.

***XV. Conditions to Closing***

Closing of this transaction is contingent upon the following:

- Completion of Hudson's final due diligence process, including but not limited to, approval of the final plan and cost review.

Your execution of this letter will also be deemed consent to perform background checks on the principal(s) of the General Partner and Developer. The General Partner understands that any consultant, engineering, environmental or other, selected for the project shall be acceptable to the lender and to the equity investor and that the Partnership shall bear the cost of fees associated with pre-construction feasibility studies, structural analysis, and monthly inspections. At closing, Hudson shall be reimbursed up to \$45,000 for its due diligence related expenses subject to approval of the tax credit allocating agency.

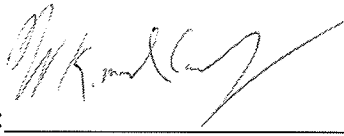
By executing this commitment and in consideration of the substantial expenses to be incurred by Hudson and its affiliates in legal and accounting fees and for due diligence, you agree that you and your affiliates will not offer any interest in the Property to any other party unless this commitment is terminated by mutual consent.

Mr. Richard Barnhart  
Wynne Senior Residences LP  
November 17, 2014, Page 11

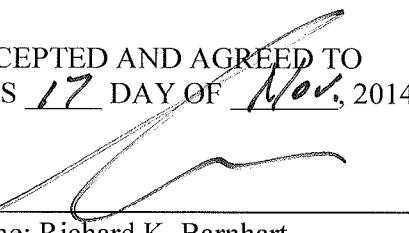
If the above proposal is acceptable, please indicate your acceptance by executing two copies and returning one to Hudson at the above address. We look forward to working with you.

Sincerely,

**Hudson Housing Capital LLC**

  
By: \_\_\_\_\_  
W. Kimmel Cameron, Jr.  
Vice President

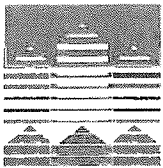
ACCEPTED AND AGREED TO  
THIS 17 DAY OF Nov., 2014

  
By: \_\_\_\_\_  
Name: Richard K. Barnhart  
Chairman and CEO  
Pennrose GP, LLC  
General Partner of Wynne Senior Residence LP

Tab 12.        Readiness and Project Schedule

Included in the section is:

- Site Control document form Philadelphia Redevelopment Authority
- Zoning Permit
- Project Schedule



**PHILADELPHIA  
REDEVELOPMENT  
AUTHORITY**

1234 Market Street  
16th Floor  
Philadelphia, PA  
19107-3701

Tel: (215) 854 6500

October 30, 2014

Mr. Richard K. Barnhart, Chairman & CEO  
Pennrose Properties, LLC  
1301 N. 31<sup>st</sup> Street  
Philadelphia, PA 19121

Mr. Gerald Murphy, Executive Director  
Wynnefield Overbrook Revitalization Corporation  
5600 City Avenue, Bala Place  
Philadelphia, PA 19131

Dear Gentlemen:

The Philadelphia Redevelopment Authority (PRA) owns the following properties:

- 2001-11 N. 54<sup>th</sup> Street

The properties are available for development. Upon the submission of a funded development proposal, PRA will proceed with the execution of a Redevelopment Agreement for the referenced properties subject to development budget and preliminary plan approval, as well as PRA Board and City Council approval.

If you have any questions, please do not hesitate to contact Tania Nikolic at (215) 209-8643.

Thank you.

Brian Abernathy  
Executive Director

cc: M. Long, OHCD  
T. Nikolic, PRA  
T. Pinson-Reviere, PRA



<b>ZONING/USE PERMIT</b>		CITY OF PHILADELPHIA DEPARTMENT OF LICENSES & INSPECTIONS 1401 JOHN F KENNEDY BLVD PHILADELPHIA, PA 19102-1667		PERMIT NUMBER <b>512247</b>	
SUBJECT TO REVOCATION IF FULL INFORMATION IS MISREPRESENTED OR NOT PROVIDED		FEE <b>\$350.00</b>	DATE <b>02/11/14</b>		
LOCATION OF WORK: <b>02001 N 54TH ST PHILADELPHIA, PA 19131-0000</b> SITE			ZONING CLASSIFICATION <b>CMX-3</b>		
OWNER CITY OF PHILADELPHIA 15TH FLOOR PHILADELPHIA PA, 19102		APPLICANT BALLARD SPAHR ANDREWS INGERSOLL LL 1735 MARKET ST 51ST FLOOR PHILADELPHIA, PA 19103-7501		PLAN EXAMINER <b>PAULOSE ISSAC</b>	
				ZONING BOARD OF ADJUSTMENT DECISION CALENDAR # DATE	

**THIS PERMIT DOES NOT AUTHORIZE ANY CONSTRUCTION UNTIL RELATED CONSTRUCTION PERMITS ARE ISSUED**

**UNDER REGULATIONS OF THE PHILADELPHIA ZONING ORDINANCE FOR**

**ZONING APPROVAL**

COMPLETE DEMOLITION OF ALL EXISTING STRUCTURES AND ERECTION OF AN ATTACHED STRUCTURE. SIZE AND LOCATION AS SHOWN ON THE APPLICATION.

**USE REGISTRATION**

FOR USES, VACANT RETAIL SPACES ON GROUND FLOOR (USES AS PERMITTED IN CMX-3 DISTRICT, USE PERMIT REQUIRED PRIOR TO OCCUPANCY) AND FIFTY-FOUR (54) DWELLING UNITS FOR SENIOR CITIZEN (AT LEAST 80% OF THE UNITS IS RESTRICTED FOR USE BY THOSE 60 YEARS OF AGE OR OLDER) AND ELEVEN (11) OFF STREET INTERIOR PARKING SPACES INCLUDING 2 H/C ACCESSIBLE SPACES AND 18 BICYCLE PARKING.

SUBJECT TO THE FOLLOWING PROVISOS AS ESTABLISHED BY THE ZONING BOARD OF ADJUSTMENT:

**ANY PERSON AGGREIVED BY THE ISSUANCE OF THIS PERMIT MAY APPEAL TO THE ZONING BOARD OF ADJUSTMENT (ZBA). FOR INSTRUCTIONS ON FILING AN APPEAL, PLEASE CONTACT THE ZBA AT 215-686-2429 OR 215-686-2430.**

IT SHALL BE THE OWNER'S RESPONSIBILITY TO SECURE THE APPROVAL OF THE PHILADELPHIA HISTORICAL COMMISSION PRIOR TO ANY ALTERATION TO A HISTORIC PROPERTY. TO CHECK THE HISTORIC STATUS OF A PROPERTY, CALL THE PHILADELPHIA HISTORICAL COMMISSION AT 215-686-7660.

FOR ESTABLISHMENTS THAT PREPARE AND SERVE FOOD: APPLICANTS MUST OBTAIN ALL NECESSARY APPROVALS FROM THE HEALTH DEPARTMENT. SEPARATE PLAN REVIEWS AND FEES MAY BE REQUIRED. CONTACT THE PHILADELPHIA DEPARTMENT OF PUBLIC HEALTH - ENVIRONMENTAL HEALTH SERVICES / OFFICE OF FOOD PROTECTION: 321 UNIVERSITY AVE. - 2ND Floor, PHILADELPHIA, PA 19104 TELEPHONE NUMBER: (215) 685-7495

**LIMITATIONS:**

IN CASES WHERE CONSTRUCTION OR INTERIOR ALTERATIONS ARE INVOLVED, A BUILDING PERMIT MUST BE OBTAINED WITHIN THREE (3) YEARS FROM THE DATE OF ISSUANCE OF THIS ZONING PERMIT.

IN CASES WHERE NO CONSTRUCTION OR INTERIOR ALTERATIONS ARE INVOLVED, THIS PERMIT BECOMES INVALID AFTER SIX (6) MONTHS UNLESS AN APPLICATION FOR A CERTIFICATE OF OCCUPANCY IS SUBMITTED AND SUBSEQUENTLY APPROVED.

**THIS PERMIT IS NOT A CERTIFICATE OF OCCUPANCY OR A LICENSE.**

ALL PROVISIONS OF THE CODE AND OTHER CITY ORDINANCES MUST BE COMPLIED WITH, WHETHER SPECIFIED HEREIN OR NOT. THIS PERMIT CONSTITUTE APPROVAL FROM ANY STATE OR FEDERAL AGENCY, IF REQUIRED.

**WITHIN 5 DAYS OF RECEIPT OF THIS PERMIT A TRUE COPY OF THIS PERMIT MUST BE POSTED IN A CONSPICUOUS LOCATION ON THE PREMISES FOR 30 DAYS**









Tab 13.       Occupancy and Affordability

Included in the section is:

- Rent Matrix Indicating income tiering and eligibility
- List of Utilities, Services and Equipment
- Subsidy Request

### Wynne Senior Residences

Unit Type	# of Units	Program Type	Income Limit	Gross Rent	ACC Subsidy	Utility Allowance	Net Rent	Avg. Tenant Rent	Net ACC Rent amount	Total Monthly Rent	Annual Rent
1 bdrm	20	LIHTC	60%	887	N/A	142	745	N/A	N/A	14,900	178,800
1 bdrm	20	LIHTC	50%	739	N/A	142	597	N/A	N/A	11,940	143,280
2 bdrm	5	LIHTC	60%	1065	N/A	179	886	N/A	N/A	4,430	53,160
1 bdrm	5	LIHTC & ACC	20.0%	392	450	142	250	250	N/A	3,500	42,000
<b>Total</b>	<b>50</b>									<b>34,770</b>	<b>417,240</b>

# Utilities, Equipment and Services

## Equipment

Range  
 Refrigerator  
 Drapes/Blinds  
 Disposal  
 Dishwasher  
 Vented Kitchen Fan  
 Vented Bathroom Fan  
 Carpet  
 Emergency Call System

Uncluded	
Yes	No
X	
X	
X	
	X
X	
X	
X	
X	
X	

## Laundry Facilities

Common Laundry  
 W/D in each unit  
 Hookups in each unit

Uncluded	
Yes	No
X	
X	
X	

## Utilities

Heat	Gas
cooking	Electric
Other Electricity	Electric
Air Conditioning	Electric
Water Heating	Gas
Sewer	
Water	

Uncluded	
Yes	No
	X
	X
	X
	X
	X
X	
X	

## Services

Rubbish Removal  
 Supportive Services

Uncluded	
Yes	No
X	
X	

**13c. Subsidy Request**

The Developer is requesting Five Hundred (\$500.00) per unit in unit based subsidy via Annual Contributions Contract (ACC). The subsidies will be applied to 10% of the units (5 units). All units are to be one bedroom units and available to applicants up to 20% of the Area Median Income.

Tab 14. Community Support

Included in the section is:

- Support letters from the Community, local elected officials and residents
- Copy of letter to Residents indicating the owners interest in entering into a mixed-Finance Transaction with PHA
- Certification indicating the residents have been considered in the revitalization plans for the property



CITY OF PHILADELPHIA  
CITY COUNCIL

CURTIS JONES, JR.  
ROOM 404, CITY HALL  
PHILADELPHIA, PA 19107  
(215) 686-3416 or 3417  
Fax No. (215) 686-1934

COUNCILMAN - 4TH DISTRICT  
MAJORITY LEADER

COMMITTEES

Chairman  
Committee on Public Safety

Vice Chair  
Committee of the Whole Council  
Committee on Appropriations  
Committee on Parks, Recreation  
& Cultural Affairs

Member  
All Committees

Mr. Brian Hudson  
Executive Director and CEO  
Pennsylvania Housing Finance Agency 211 North Front Street  
Harrisburg, PA 17101-1406

November 13, 2014

Re: Wynne Senior Apartments Tax Credit

Application Dear Mr. Hudson,

Please let this letter serve as my support for the Pennrose LLC/Wynnefield Revitalization Corporation 9% Low Income Housing tax credit application for the redevelopment of the historic Wynne Ballroom, located at 2001 North 54<sup>th</sup> Street into the Wynne Senior Apartments, a 54-unit senior housing development.

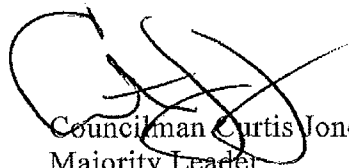
This project will provide much needed senior housing for Wynnefield, a community where the majority of the residents are elderly and seeking senior housing opportunities. This development will also provide much needed community and retail space. I am committing \$100,000.00 in Neighborhood Transformation Initiative (NTI) funds to the project, dependent upon the award of tax credits.

The redevelopment of the Wynne Ballroom will be the anchor project at the top end of 54<sup>th</sup> Street and an integral part of the revitalization of this Commercial Corridor. This will be one of a number of necessary major improvements along this corridor. In November 2013, Presby's Inspired Life started construction of a \$12 million dollar project to construct 48 subsidized senior housing units with completion in December, 2014 and will serve as the other anchor at the bottom of the 54<sup>th</sup> Street corridor. The Wynnefield Overbrook Revitalization Corporation has obtained multiple grants for business facade improvements and banners along 54<sup>th</sup> Street. My office in collaboration with City of Philadelphia Commerce Department, Streets Department, and the Southeastern

Transportation Authority have collaborated to install big belly trash compactors, bump outs, bus shelters, tree plantings and street repaving along the corridor as well. And finally, a \$500,000.00 renovation of Triangle Park, which is directly behind the Presby's Inspired Life project, was completed and opened in the summer of 2014. The combination of these projects and the redevelopment of the Wynne Ballroom, will positively changes the dynamic of 54<sup>th</sup> Street,

The redevelopment of the Wynne Ballroom will be the capstone project for the historic 54<sup>th</sup> Street Corridor and will bring much needed senior housing and economic opportunity to the area. My office, along with others, have not only "talked the talk but walked the walk" by making major investments in the revitalization of this area. The redevelopment of the Wynne Ballroom is an integral part which would continue the revitalization and also provide additional needed affordable senior housing to the aging population in my district. Therefore, I strongly support this project and appreciate your consideration of the Pennrose/Wynnefield Overbrook Revitalization Corporation 9% Tax Credit application.

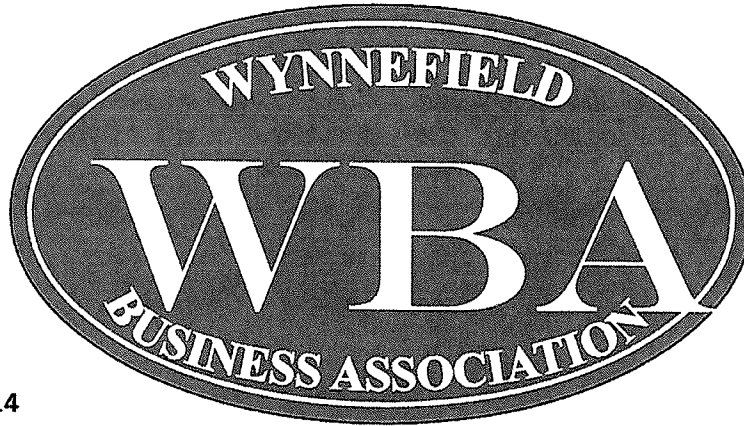
If you have any questions or concerns, please contact me at 215-686-3416.



Councilman Curtis Jones, Jr.  
Majority Leader  
4<sup>th</sup> Council District  
Room 404, City Hall  
Philadelphia, PA







November 13, 2014

Mr. Brian Hudson  
Pennsylvania Housing Finance Agency  
211 North Front Street  
Harrisburg, PA 17101-1406

RE: Wynne Ballroom/Pennrose/WORC proposal

Dear Mr. Hudson:

I am writing in support of Pennrose/ Wynnefield Overbrook Revitalization Corporation's (WORC) efforts and proposed plan to redevelop the long vacant Wynne Ballroom. The Wynnefield Business Association (WBA) has worked closely with WORC to revitalize the 54<sup>th</sup> Street commercial corridor and the redevelopment of the Wynne would serve as a strong anchor and improvement for this corridor. The City of Philadelphia Commerce Department, Councilman Curtis Jones office and WORC have made significant improvements along 54<sup>th</sup> Street, such as, tree plantings, Big Belly trash compactors, bus shelters, storefront improvements and the redevelopment of the old vacant Kirshner oil site. The redevelopment of the Wynne would further strengthen the revitalization of this corridor and hopefully entice new businesses to locate in this corridor.

The Wynnefield Business Association strongly supports the Pennrose/WORC proposal for the 9% Low Income Housing Tax Credit and hope their proposal is given every consideration.

Sincerely,

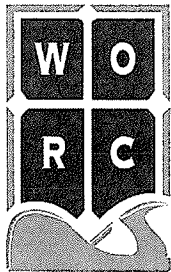
A handwritten signature in black ink, appearing to read "Will Butts", written in a cursive style.

Will Butts  
Acting President  
Wynnefield Business Association

Wynnefield Residents Association Meeting

11/18/14

Name	Email Address	Address	Phone #
Jucelle Mason	LPM5040@AOL.COM	5040 Overbrook Ave	215-473-1251
Mary Ramsey	RAMSEY5235@comcast.net	5630 Overbrook	215-877-7472
Gerald Murphy	gmurphy@sjv.edu	5600 City Ave	610-660-1241
Michael Freedman	mfreedman@freedman-properties.com	2231 Bryn Mawr	484-630-942
Harry Moody	hmoody@pennrose.com	1301 N 51 <sup>st</sup> St	Philadelphia 19131 382-8664
Ray Roberts, AIA	rob@kitcherandassociates.com	796 Kellen Ave, College Park, MD	856-854-1600
Annalisa Smith	alsmith@premierinc.com	1604 Nesho Ave Phil	215 394 4342
Mitchell Goid	mgoid@aspgrp.com	50 Greenfield Ave, Suite 201	215 850-8613
Chris Morrison	chrism@aspgrp.com	" " "	" " "
Legoon Rayland	RAYRAG@aol.com		215-879-1983
Garrick Baskerville	garrick.baskerville@gmail.com	635 Conestoga Rd	814-777-3725
Richard O'Malley	rfoalley35@aol.com	5001 Overbrook Ave	<del>215-878-5112</del>
FREDA CARTER		5941 Woodcrest Ave	fcarter519@msn.com
JOAN CARTER		5941 WOODCREST AVE	
RENNIE PARKER	rennreparker73@gmail.com	5642 Gairmont Rd	267-344-9623
Al Henry	aldelasalle73@yahoo.com		215 990 1828
Maurice Monroe	5307 Diamond St mauricemonroe614@gmail.com		267-471-3417
Jessie Moss			
Ray Lambert		2409 N. 57 <sup>th</sup> St	215-477-6853
Bruce Cottman		2135 Melvin St.	878-7799
NRA LEVIN		5649 GAINOR ROAD	215-477-6838
Paula Lamb		5741 Woodbine Ave	215-620-7250
Cecilia Jones		5204 Euclid St	215 519 8637
Joseph L. Sawyer			
Marc Antony & Stephanie V. King		5408 Wyndale Ave	215-477-2619
ROANDUS WATSON		5601 Wyandfield Ave	267-304 9761
Darlene Threatt		5401 Woodcrest	215 732 9555
Gloria Howard		2409 BRYN MAWR AVE	
Nicole Brown	elizary76@gmail.com	2127 N 58 <sup>th</sup>	914 882 0877 ✓
Jay Johnson	wnasays@gmail.com	5638 Gairmont Rd	19131-215-219-0574



## WYNNEFIELD OVERBROOK REVITALIZATION CORPORATION

November 12, 2014

Dear Neighbor,

We are writing to inform all of our neighbors that the Wynnefield-Overbrook Revitalization Corporation (WORC), in partnership with Pennrose Properties, is working to redevelop the Wynne Theatre site. The Development is proposed to be a 50 unit facility for seniors, 62 or older. The facility will include amenities such as community space, computer lab, fitness center, wellness facility and commercial space with on-site management and maintenance. In addition, the design team has worked diligently to maintain the architectural heritage of the building acknowledging the importance of this facility to the greater community.

The building will be affordable to low income seniors. In addition to affordable rents, we are seeking public housing subsidies for at least 5 of the units for those seniors at the lowest end of the income spectrum that still may not be able to afford the rents but deserve a decent, safe place to live. To that end, we intend to enter into a Mixed Finance Transaction with the Philadelphia Housing Authority. We are required by the Philadelphia Housing Authority to notify the community of our intent to request public housing subsidies. This letter shall serve as official notification.

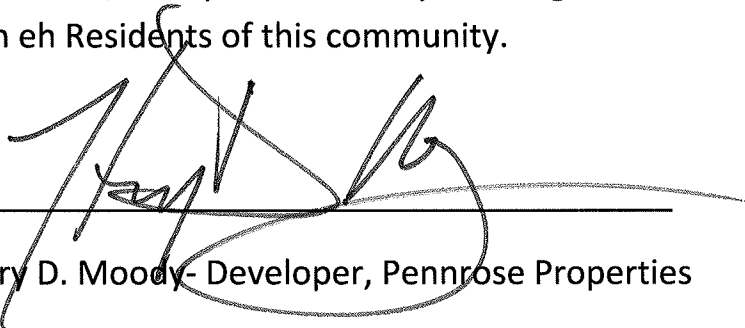
If you have any questions regarding the development of the facility of this request to the Philadelphia Housing Authority, please feel free to contact my office at 610-660-1241.

Respectfully,

  
Gerald Murphy  
Executive Director

Tab 14c

Please allow this notice to certify that the Residents of the Wynnefield Community have been included in the revitalization process of the Wynne Theatre. Pennrose has partnered with and consulted with the local Community Development Corporation (WORC) as well as elected officials within the district. In addition, multiple community meetings have been held to discuss the project with eh Residents of this community.



---

Harry D. Moody - Developer, Pennrose Properties

Tab 15. Diversity

Included in the section is:

- MBE/WBE plan
- Section 3 plan

**TAB 15 A DIVERSITY**

**MBE / WBE Plan**

Over the years Pennrose has worked with numerous contractors to achieve MBE/WBE participation in its various projects. This project will seek to achieve the same objectives.

Pennrose not only encourages its contractors to hire MBE/WBE certified sub-contractors, we incorporate participation language in our Construction Contracts that require the General Contractor to meet and/or exceed MBE/WBE participation goals as required by local housing agencies. To date we have been extremely successful in this practice. We monitor the hiring practices closely throughout the construction period to insure that every effort is made to meet required goals. These goals are typically discussed during regular construction meetings and shortcomings are addressed when appropriate.

In instances where we find some difficulty in implementing this practice, Pennrose sometimes hire a local service organization to assist identify quality sub-contractors that are prepared to participate in construction.

Pennrose has in the past and will continue to use MBE/WBE information from the various local agencies such as Philadelphia Redevelopment Authority, Minority Business Enterprise, etc. as a source to identify qualified businesses to participate in the Contract. In addition, we rely on relationships that our contractors have built with MBE/WBE firms that have performed well in the past. We expect that the General Contractor will continue to use these firms and provide opportunities. For example, we worked with General Contractor, Domus Inc., to develop an affirmative action policy with ambitious MBE/WBE goals for a Project Pennrose completed in the City of Chester. As a result of effective management and oversight, the project achieved MBE utilization of 57%. Domus has been extremely successful in meeting MBE/WBE Goals receiving several Certifications for the City of Philadelphia. Some of their achievements are listed below.

Total Contract Dollars	Help Philadelphia	Nicotown CT	MT Vernon Apts	Nugent Senior Housing	Villanueva Homes
MBE	22%	31%	24%	19%	18%
WBE	11%	6%	8%	8%	9%

Total Workforce	Help Philadelphia	Nicotown CT	MT Vernon Apts.	Nugent Senior Housing	Villanueva Homes
MBE	22%	31%	24%	19%	18%
WBE	11%	6%	8%	8%	9%

Pennrose is also working with a non-profit partner Wynnefield-Overbrook revitalization Corp. (WORC) that represents the community. We intend to use them as a resource to recruit and use qualified MBE/WBE firms to participate in the project. Qualified Firms will be referred to Development Team members as opportunities arise

Our past experience in meeting MBE/WBE goals have for the most part either met or exceeded Local, State or federal requirements. See an example of our team's achievements below.

<b>Development</b>	<b>General Contractor</b>	<b>% MBE Utilization</b>	<b>% WBE Utilization</b>
Montgomery Heights	Claremont Construction	34.0%	13.0%
Chatham Estates HOPE VI	Domus, Inc.	57.2%	0.0%
McCallie Homes HOPE VI- Demo/IF	Smoot Construction	35.6%	58.5%
Wellington Ridge HOPE VI (Rental)	Harkins Builders, Inc.	21.1%	0.5%
MLK HOPE VI - Phase I(PHL)	Domus, Inc.	22.0%	8.0%
Spencer's Place (PHL)	Domus, Inc.	29.0%	0.5%
Universal Court (PHL)	Domus, Inc.	33.0%	5.0%
The Chateau	Harkins Builders, Inc.	36.2%	2.2%
The Riviera	Harkins Builders, Inc.	36.9%	7.7%
Reservoir Hill	Southway/CL McCoy	41.1%	11.3%
Cherry Hill	Harkins Builders, Inc.	26.3%	0.5%

Pennrose typically works with Partners that have Section 3 requirements. In an effort to remain and improve on compliance related issues, Pennrose is being pro-active in working with legal counsel designing and adopting a new section 3 activity plan that incorporates the use of MBE/WBE resources. Tools that Pennrose staff are currently using or intending to use to monitor Section 3/MBE/WBE activity have been attached as an exhibit for reference.

**TAB 15 B**

Pennrose's development approach embraces the concept of creating opportunity within the communities we create by contracting with Minority and Women Owned Business Enterprises (MBE/WBE) and Section-3 businesses, as well as creating employment opportunities for PHA residents. Our activities are motivated by three core principles. We are **committed to being a good neighbor** by exceeding the hiring and training goals set by local municipalities and regulatory agencies; We are **focused on opportunity** by making sure that the general contractors we work with comply with minority and women-owned business contracting goals; And we are **engaged in the community** through extensive work with local organizations, workforce development offices and local government. Pennrose has consistently performed above targeted levels in contracting with MBE/WBE and Section-3 firms and brings a level of experience and sophistication that is second to none when it comes to creating economic opportunity through strong participation of MBE/WBE's and local businesses. Pennrose will utilize its expertise to ensure that PHA's MBE/WBE and Section-3 business and resident contracting goals are met for this project.

To date, Pennrose has not hired any WBE/MBE firms for this project. However, Pennrose will endeavor abide by the spirit of the WBE/MBE Section 3 guideline to the best of its ability.

**Minority and Women Owned Business Enterprises (MBE/WBE)**

Pennrose understands the importance of creating economic opportunity through strong participation by Minority and Women owned businesses. We have consistently demonstrated our commitment by providing employment and contracting opportunities to qualified MBE/WBE firms through dozens of projects, and are committed to doing so as we approach the Wynne Senior Residences development project. Pennrose commits to work aggressively to achieve the following minimum levels of MBE/WBE participation in the Wynne Senior Residences development.

<u>MBE</u>	<u>WBE</u>
20%	10%

Pennrose is committed to meeting the above participation goals for the Wynne Senior Residences project by providing business opportunities across the full array of work categories, ranging from such categories as semi-professional and professional services to construction and material supplies. As part of this effort Pennrose would implement an outreach plan that will increase the opportunities for MBE/WBE businesses, which would generally consist of the following:

1. Hold meetings prior to the bidding of the work in order to supplement advertisement efforts and assist qualifying MBE/WBE firms in the procurement process.
2. Advertise the Pre-Bid informational meetings and the contracting opportunities provided by the project in the local area newspaper(s) and through other publications or organizations that target the minority community.
3. Notify certified MBE/WBE businesses who have capabilities pertinent to the work of the contract that their interest in the contract is being solicited.
4. Encourage joint venture relationships between MBE/WBE firms that can complement one another's services.
5. Where applicable, work with selected contractors to facilitate training for and ensure correct completion of Davis-Bacon Wage reporting regulations and other complicated reporting requirements.

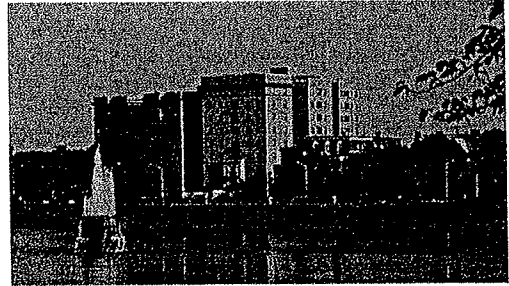
Please note that Pennrose and the balance of the assembled team will not discriminate against any employee or applicant for employment because of race, color, religion, age, sex, marital status, military service disability, national origin, or sexual orientation. Pennrose will see that contractors also adhere to this policy. Specifically in regards to military service disability, Pennrose is sensitive to the issues surrounding veterans and recognizes the requirements of the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended. The team prides itself on providing opportunities to disadvantaged persons and will make every effort to include Vietnam Veterans in its hiring efforts by having the selected general contractor and its subcontractors advertise opportunities with local Veteran organizations and other agencies that will be able to disseminate information easily to Veterans.



Below please find examples of Pennrose's track record on specific projects:

**The Chateau - Baltimore, MD**  
**38.4% MBE/WBE participation**

In 2004 Pennrose completed an historic restoration of The Chateau, a 47-unit, eight-story, turn of the century landmark property in the Reservoir Hill neighborhood of Baltimore Maryland. The general contracting team for The Chateau was a joint venture between Harkins Builders, Inc. and Doracon Contracting, Inc. A concerted effort was made to ensure strong MBE/WBE participation in the project. Harkins utilized its extensive database of MBE and WBE firms to identify potential candidates and then to negotiate their participation. The overall MBE/WBE participation in the project was 31.5%, or \$2.38 million of MBE/WBE subcontracts on construction and services totaling \$7.57 million. The participation level for construction only was higher, at 38.4%.



**The Villages at Alton Park - Chattanooga, TN**

**Phase I: 95% MBE/WBE Participation**

**Phase II: 53% MBE/WBE Participation**

Pennrose utilized an aggressive and highly successful approach to maximizing MBE/WBE and Section-3 participation at The Villages at Alton Park HOPE VI development in Chattanooga, Tennessee, and the results were phenomenal. Working closely with General Contractor Smoot Construction, one of the largest minority-based contractors in the country, Pennrose held a number of community outreach meetings to identify potential minority and women-owned subcontractors and to assist them in obtaining the MBE certifications, bonding, licensing, and insurance necessary to work on Villages at Alton Park. Subs who were unable to obtain bonding on their own received assistance from Smoot. As a result of this extraordinary effort, most of the subcontractors were local companies, and a substantial portion of the construction work was awarded to minority contractors. The MBE participation rate was approximately 95% in Phase I rental, and 53% in Phase II, well beyond all local requirements. As a result, Pennrose was awarded "Advancement in Diversity" by the Chattanooga African American Chamber of Commerce.



**Chatham Estates HOPE VI - Chester, PA**  
**57.2% MBE/WBE participation**

The Chester Housing Authority received a \$15 million HOPE VI grant to redevelop the 1940s Lamokin Village Housing Project and selected Pennrose as Developer for the senior component of the proposed revitalized community. Pennrose worked with General Contractor, Domus Inc., to develop an affirmative action policy with ambitious MBE/WBE goals. M-Power and Associates was the local service company that coordinated the subcontractor bidding and hiring processes to ensure that those goals were met. As a result of effective management and oversight, the project achieved MBE utilization of 57.2%.



Additional examples of Pennrose's track record providing opportunities for MBE/WBE's follows below.

Development	Location	% MBE/WBE Utilization
McCallie Homes HOPE VI- Demo/IF	Chatanooga, TN	94.10%
Orchard Ridge Rental II	Baltimore, MD	62.20%
Uplands Rental Phase I*	Baltimore, MD	60.00%
Chatham Estates HOPE VI	Chester, PA	57.20%
Reservoir Hill	Baltimore, MD	52.40%
Chapel Green	Baltimore, MD	51.20%
Orchard Ridge Rental I	Baltimore, MD	50.90%
Orchard Ridge Homeownership I	Baltimore, MD	50.10%
Orchard Ridge Rental III	Baltimore, MD	46.80%
The Riviera	Baltimore, MD	44.60%
The Chateau	Baltimore, MD	38.40%
Universal Court	Philadelphia, PA	38.00%

#### **Acceptance of Affirmative Action Policy and Requirements**

Pennrose and Domus have reviewed and accept the Affirmative Action Policy and Requirements contained in this RFP and affirms its commitment to maximize the utilization of certified MBE & WBE contracts, subcontracts and suppliers in all contracts with the PHA. Should Pennrose be selected as the developer for Wynne Senior Residences, our team will actively solicit certified MBE/WBE firms for the fields of Construction and Market Analysis, as well as PR/Marketing and Branding. The Pennrose team will conduct a full and complete solicitation for qualified team members and will document that outreach process using the provided J-Pages and complete all documentation as it relates to MBE/WBE participation, as required by PHA.

*At this time, we have completed the Section 3 forms to the best of our ability. The completed forms are included at the end of this Section.*

#### **Section-3**

Creating economic opportunity for local residents is a crucial part of comprehensive neighborhood revitalization. Pennrose is committed to providing employment and contracting opportunities to qualified, Section-3 eligible businesses and individuals from the community and surrounding neighborhood.

Pennrose will comply with all requirements of Section-3 of the Housing and Urban Development Act of 1968, as amended by Section 915 of the Housing and Community Development Act of 1992, which pertain to the utilization of area residents and businesses. At a minimum, **Pennrose will require that 30% of all new hires be Section-3 eligible** and will require our general contractor, Domus, to aggressively pursue every available opportunity to increase the involvement of area residents, *particularly PHA residents*, and businesses. To achieve its local hiring goals, Pennrose will require our contractor to submit a Section-3 plan as part of their bid documents. These plans will enumerate specific hiring goals consistent with HUD regulations and, targets set by PHA. In addition, Pennrose will require our contractor and its subcontractors to utilize appropriate apprenticeship programs to meet Section-3 employment goals and will encourage the contractor to offer career-track jobs to Section-3 eligible hires allowing such hires to develop marketable skills and, where possible, permanent positions with the contracting firm.

In addition to offering employment opportunities, Pennrose and Domus will also promote training to enhance the opportunities available to PHA residents and residents and businesses of Philadelphia. Such programs will include job readiness, job and business development programs, on-the-job training, and apprenticeship programs. Although the implementation of these and other Section-3 initiatives will have a neighborhood-wide reach, our development team is committed to providing first priority of employment and services to the impacted residents. Further, emphasis will be placed on those in the area who have been

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disadvantaged in their efforts to participate in the general economy, whether by a reason of inadequate preparation/qualifications or discrimination. Among the disadvantaged, minority groups will be targeted for involvement; and to the greatest extent feasible, low- and very low-income persons, particularly persons who are recipients of HUD assistance for housing, will be targeted as well. The aim of the support programs is to overcome impediments to prior participation, including lack of adequate education/training.

Pennrose, specifically, consistently seeks to recruit from within its "family" and provides opportunity and financial support for training programs, which provide its recruits/employees with the skills necessary to qualify for a position or to seek promotion within the company. As the development nears completion, Pennrose will recruit Section-3 eligible persons for positions in operations including administrative or maintenance support positions. These career-track positions will offer opportunity for promotion to other positions within site operations.

In order to alert Section-3 eligible persons to the employment and training opportunities, the development team will engage in a comprehensive advertising campaign in the local area. It will work with resident organizations, community-based organizations that serve those who reside in government-assisted housing, and local employment agencies. The Pennrose development team will hold sessions to discuss training and employment opportunities available and provide assistance completing job applications and other requirements. As part of the Section-3 Plan, Pennrose will require the general contractor to work with PHA and other relevant entities, agencies, and organizations to reach the maximum number of Section-3-eligible persons and Section-3-eligible businesses.

To increase participation by and the benefit afforded to Section-3 eligible businesses, the team will divide construction trade contracts into as many sub-components as possible. This strategy levels the playing field for capable local businesses that do not have the capacity to take on large contracts. Also, the team will explore the possibility of offering joint venture-type business arrangements for Section-3-eligible businesses and/or financial support of a limited number of businesses.

To monitor compliance with hiring goals, the team will, where possible, train and employ Section-3 eligible persons to monitor, inspect, and report upon contractors and their sub-contractors performance achieving Section-3 goals. Information regarding the composition of the workforce will be gathered at the construction meetings, then, reported to PHA. Listed below are examples of typical job functions for which residents could be screened:

### **Construction**

Drafting  
Carpentry  
Masonry/bricklaying  
Drywall Installation  
Electrical  
Plumbing  
HVAC  
Painting

### **Services**

Appliance Repair  
Carpet Installation  
Janitorial  
Landscaping  
Printing  
Social Service Provision  
Information Technology

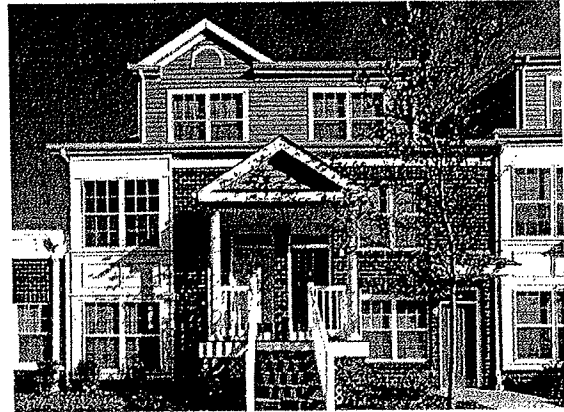
### **Operation**

Accounting  
Payroll  
Data Entry  
Bookkeeping  
Word Processing  
Records Management  
Compliance Monitoring  
Property Management

With a total of 37 Section-3 hires, Obery Court I and II is an excellent example of Pennrose's ability to lead strong local hiring efforts.

**Obery Court I and II - Annapolis, MD**  
**(37) Local Resident Section-3 Hires**

Pennrose Properties, LLC and the Housing Authority of the City of Annapolis (HACA) teamed up to transform two public housing projects into a revitalized neighborhood with a park, a multi-purpose community center with Head Start classrooms, and a tot lot next to the College Creek waterway. The project employed Baltimore-based contractor Southway Builders who partnered with MBE firm C.L. McCoy. With Pennrose's leadership, the team set high goals for M/WBE utilization, as well as Section-3 hiring of local residents, and succeeded in achieving those goals. Phase I, completed in 2010 and consisting of 50 affordable rental units, included 15 Section-3 hires from the local area. Phase II, consisting of 63 affordable rental units and resulted in 22 local Section-3 hires. The results achieved with Obery I and II stand as proof of the great pride Pennrose takes in developing excellent communities that utilize the talents and skills of the local workforce.



**Acceptance of Section-3 Policy and Requirements**

Pennrose and Domus have reviewed and accept the Section-3 Policy and Requirements contained in this RFP and affirms its commitment to maximize the utilization of Section-3 businesses and individuals. Should Pennrose be selected as the developer for Wynne Senior Residences, our team will aggressively pursue every available opportunity to increase the involvement of area residents. At that time, we will fully complete and submit the provided Section-3 Program Forms to the PHA.

*At this time, we have completed the Section-3 Program forms to the best of our ability. The completed Section-3 Program forms are included in Tab 6.*

**General Contractors' MBE/WBE & SECTION-3 Utilization**

As a local Business Enterprise certified Philadelphia based contracting firm in business since 1976, Domus has had a commitment and has operated under a philosophy of maximizing the opportunities for MBE/WBE subcontractors, suppliers and workforce employment from the community in which the project site is located. The majority of Domus' construction activity is funded totally or in part by public sources which mandate the achievement of MBE/WBE subcontracting and purchasing goals as well as neighborhood hiring requirements. Regardless of funding sources, Domus has consistently met or exceeded these goals at all levels allowing Domus to be recognized as a leader regarding success with Affirmative Action and Section-3 compliance. Domus, as a signatory contractor with the Philadelphia Building Trades works diligently with our various union subcontractors, their associated union business agents, and respective database of available workers to maximize employment opportunities for the community workforce. Domus has repeatedly demonstrated its commitment and achievement of meeting the project goals for the hiring of MBE/WBE firms as well as the hiring of local trades people. The Certificates of Appreciation as well as the graphs on the following pages, highlights Domus' successful track record in utilizing MBE/WBE and Section-3 firms.

## Tab 16 Certifications

Included in the section is:

- Certifications and Representations of Offerors
- Non-collusion Affidavit
- Acknowledgement of Receipt of Addendum # 1
- Initialed Addendum #1

**I. CERTIFICATIONS AND REPRESENTATIONS OF OFFERORS**  
**RFQ Number P-004440**  
**Unit-Based Operating Subsidy Program**

**1. Offeror's Certification Of Eligibility**

- (a) By the submission of this proposal, the offeror certifies that to the best of its knowledge and belief:
- (i) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, is ineligible to be awarded contracts by any agency of the United States Government, HUD, or the State in which this Contract is to be performed;
  - (ii) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, is ineligible to participate in HUD programs pursuant to 24 CFR Part 24;
  - (iii) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, has been suspended, debarred or otherwise restricted by any Department or Agency of the Federal Government or of any State Government or of the City of Philadelphia or the Philadelphia Housing Authority from doing business with such Department or Agency for the period beginning 5 years prior to the date of this certification;
  - (iv) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, has experienced default or noncompliance under any contract for the U.S. Department of Housing and Urban Development, or any other governmental agency with which it has contracts for the period beginning 10 years prior to the date of this certification;
  - (v) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, has unresolved findings raised as a result of HUD audits, management reviews or any other Governmental investigations concerning the offeror or any person or firm which has an interest in the offeror's firm under any of the offeror's contracts;
  - (vi) There has not been a suspension or termination of payments under any HUD contract in which the offeror has a legal or beneficial interest attributable to the offeror's fault or negligence;
  - (vii) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, has defaulted on an

obligation covered by a bond and have not been the subject of a claim under any fidelity bond.

- (viii) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, has been found by HUD or the Commonwealth of Pennsylvania to be in noncompliance with any applicable civil rights laws.
  - (ix) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, is a Member of Congress or a Resident Commissioner or otherwise prohibited or limited by law from contracting with the Philadelphia Housing Authority.
  - (x) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm is an officer or employee or commissioner of the Philadelphia Housing Authority who is prohibited or limited by law from contracting with the PHA.
  - (xi) Neither the offeror, nor any person or firm which has an interest in the proposal or the offeror's firm, has been convicted of a felony and are not presently the subject of a complaint or indictment charging a felony. (A felony is any offense punishable by imprisonment for more than one year, but does not include any offense classified as a misdemeanor under the laws of a State and punishable by imprisonment of two years or less.)
- (b) Statements above to which the offeror cannot certify (if any) have been deleted by striking through the words with a pen. The offeror has initialed each deletion (if any) and has attached a true and accurate signed statement (if applicable) to explain the facts and circumstances which qualify the offeror as a responsible offeror for participation in this project.
- (c) The certification in paragraph (a) above is a material representation of fact upon which reliance was placed when making the award. If it is later determined that the offeror knowingly rendered an erroneous certification, the Contract may be terminated for default, and the offeror may be debarred or suspended from participation in HUD and PHA programs and other Federal contract programs.

## 2. **Small, Minority, Women-Owned Business Concern Representation**

The offeror represents and certifies as part of its offer that it:

- (a) [ ] is, [X] is not a small business concern. "Small business concern," as used in this provision, means a concern, including its affiliates, that is independently owned and operated, not dominant in the field of operation in

which it is bidding, and qualified as a small business under the criteria and size standards in 13 CFR 121.

- (b)  is,  is not a women-owned small business concern. "Women-owned," as used in this provision, means a small business that is at least 51 percent owned by a woman or women who are U.S. citizens and who also control and operate the business.

Certifying Agency & Certification Number (if applicable):

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- (c)  is,  is not a minority enterprise which, pursuant to Executive Order 11625, is defined as a business which is at least 51 percent owned by one or more minority group members or, in the case of a publicly owned business, at least 51 percent of its voting stock is owned by one or more minority group members, and whose management and daily operations are controlled by one or more such individuals.

- (i) For the purpose of this definition, minority group members are:  
(check the block applicable to you)

Black Americans  Asian Pacific Americans  
 Hispanic Americans  Asian Indian Americans  
 Native Americans  Hasidic Jewish Americans

- (ii) Certifying Agency & Certification Number (if applicable):
- 

### 3. Conflict of Interest

In the absence of any actual or apparent conflict, the offeror, by submission of a proposal, hereby warrants that to the best of its knowledge and belief, no actual or apparent conflict of interest exists with regard to the possible performance of this procurement, as described in the clause in this solicitation titled "Organizational Conflict of Interest."

### 4. Contingent Fee Representation and Agreement

- (a) The offeror represents and certifies as part of its offer that, except for full-time bona fide employees working solely for the offeror, the offeror:
- (i)  has,  has not employed or retained any person or company to solicit or obtain this Contract; and
- (ii)  has,  has not paid or agreed to pay to any person or company employed or retained to solicit or obtain this Contract any commission, percentage, brokerage, or other fee contingent upon or resulting from the award of this Contract.



- (b) If the answer to either (a)(1) or (a) (2) above is affirmative, the offeror shall make an immediate and full written disclosure to the PHA Contracting Officer.
- (c) Any misrepresentation by the offeror shall give the PHA the right to (1) terminate the resultant contract; (2) at its discretion, to deduct from Contract payments the amount of any commission, percentage, brokerage, or other contingent fee; or (3) take other remedy pursuant to the Contract.

**5. Certificate of Independent Price Determination**

- (a) The offeror certifies that –
  - (i) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to (i) those prices, (ii) the intention to submit a offer, or (iii) the methods or factors used to calculate the prices offered;
  - (ii) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and
  - (iii) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.
- (b) Each signature on the offer is considered to be a certification by the signatory that the signatory:
  - (i) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to subparagraphs (a)(i) through (a)(iii) above; or
  - (ii)
    - (1) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to subparagraphs (a)(i) through (a)(iii) above (insert full name of person(s) in the offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of his or her position in the offeror's organization):

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- (2) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i) above have not participated, and will not participate, in any action contrary to subparagraphs (a)(i) through (a)(iii) above; and
  - (3) As an agent, has not personally participated, and will not participate in any action contrary to subparagraphs (a)(i) through (a)(iii) above.
- (c) If the offeror deletes or modifies subparagraph (a)2 above, the bidder/offeror must furnish with its offer a signed statement setting forth in detail the circumstances of the disclosure.
- (d) The offeror further certifies that he/she has not been convicted or found liable for any act prohibited by state or federal law involving conspiracy or collusion with respect to proposing or bidding on any public contract within the last three years. Such act or conviction does not automatically disqualify an offeror, but may be grounds for administrative suspension or grounds for consideration by PHA as to whether PHA should decline to award a contract to such an offeror on the basis of a lack of responsibility. If offeror has been convicted of any act prohibited by State or Federal law involving collusion with respect to proposing or bidding on any public contract within the past three years, offeror should attach an explanation of the circumstances surrounding that conviction.
- (e)  [check if following paragraph is applicable]

Non-collusive affidavit. (applicable to contracts for construction and equipment exceeding \$50,000)

- (i) Each bidder shall execute, in the form provided by the PHA/IHA, an affidavit to the effect that he/she has not colluded with any other person, firm or corporation in regard to any bid submitted in response to this solicitation. If the successful bidder did not submit the affidavit with his/her bid, he/she must submit it within three (3) working days of bid opening. Failure to submit the affidavit by that date may render the bid nonresponsive. No contract award will be made without a properly executed affidavit.

- (ii) A fully executed "Non-collusive Affidavit" [x] is, [ ] is not included with the bid. (See page I-12 for Affidavit form).

**6. Certification And Disclosure Regarding Payments To Influence Certain Federal Transactions (applicable to contracts exceeding \$100,000)**

- (a) The definitions and prohibitions contained in Section 1352 of title 31, United States Code, are hereby incorporated by reference in paragraph (b) of this certification.
- (b) The offeror, by signing its proposal, hereby certifies to the best of his or her knowledge and belief as of Nov. 11, 2014 that:
  - (i) No Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with the awarding of a contract resulting from this solicitation;
  - (ii) If any funds other than Federal appropriated funds (including profit or fee received under a covered Federal transaction) have been paid, or will be paid, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress on his or her behalf in connection with this solicitation, the proposer shall complete and submit, with its proposal, OMB standard form LLL, "Disclosure of Lobbying Activities;" and
  - (iii) He or she will include the language of this certification in all subcontracts at any tier and require that all recipients of subcontract awards in excess of \$100,000 shall certify and disclose accordingly.
  - (iv) Submission of this certification and disclosure is a prerequisite for making or entering into this Contract imposed by section 1352, title 31, United States Code. Any person who makes an expenditure prohibited under this provision or who fails to file or amend the disclosure form to be filed or amended by this provision, shall be subject to a civil penalty of not less than \$10,000, and not more than \$100,000, for each such failure.

**7. Certification Of Nonsegregated Facilities (applicable to contracts exceeding \$10,000)**

- (a) The offeror's attention is called to the clause entitled "Equal Employment Opportunity" of Section I of the Terms and Conditions of the Contract.

- (b) "Segregated facilities," as used in this provision, means any waiting rooms, work areas, rest rooms and wash rooms, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees, that are segregated by explicit directive or are in fact segregated on the basis of race, color, religion, or national origin because of habit, local custom, or otherwise.
- (c) By the submission of this proposal, the offeror certifies that it does not and will not maintain or provide for its employees any segregated facilities at any of its establishments, and that it does not and will not permit its employees to perform their services at any location under its control where segregated facilities are maintained. The offeror agrees that a breach of this certification is a violation of the Equal Employment Opportunity clause in the Contract.
- (d) The offeror further agrees that (except where it has obtained identical certifications from proposed subcontractors for specific time periods) prior to entering into subcontracts which exceed \$10,000 and are not exempt from the requirements of the Equal Employment Opportunity clause, it will-
  - (i) Obtain identical certifications from the proposed subcontractors;
  - (ii) Retain the certifications in its files; and
  - (iii) Forward the following notice to the proposed subcontractors (except if the proposed subcontractors have submitted identical certifications for specific time periods):

**NOTICE TO PROSPECTIVE SUBCONTRACTORS OF  
REQUIREMENT FOR CERTIFICATIONS OF NONSEGREGATED  
FACILITIES.**

A Certification of Non-segregated Facilities must be submitted before the award of a subcontract exceeding \$10,000 which is not exempt from the provisions of the Equal Employment Opportunity clause of the prime contract. The certification may be submitted either for each subcontract or for all subcontracts during a period (i.e., quarterly, semiannually, or annually).

**NOTE:** The penalty for making false statements in bids is prescribed in 18 U.S.C. 1001.

**8. Clean Air And Water Certification (applicable to contracts exceeding \$100,000)**

The offeror certifies that (check the block applicable):

- (a) Any facility to be used in the performance of this Contract [ ] is [x] is not listed on the Environmental Protection Agency List of Violating Facilities:
- (b) The offeror will immediately notify the PHA Contracting Officer, before award, of the receipt of any communication from the Administrator, or a designee, of the Environmental Protection Agency, indicating that any facility that the offeror proposes to use for the performance of the Contract is under consideration to be listed on the EPA List of Violating Facilities; and,
- (c) The offeror will include a certification substantially the same as this certification, including this paragraph (c), in every nonexempt subcontract.

**9. Drug-Free Workplace Certification**

By submission of its offer, the offeror, if other than an individual, who is making an offer that equals or exceeds \$10,000, certifies and agrees, that with respect to all employees of the offeror to be employed under a contract resulting from this solicitation, other than a contract for the procurement of commercial items, it will - no later than 30 calendar days after contract award (unless a longer period is agreed to in writing), for contracts of 30 calendar days or more performance duration; or as soon as possible for contracts of less than 30 calendar days performance duration, but in any case, by a date prior to when performance is expected to be completed -

- (a) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition;
- (b) Establish an ongoing drug-free awareness program to inform such employees about:
  - (i) The dangers of drug abuse in the workplace;
  - (ii) The Contractor's policy of maintaining a drug-free workplace;
  - (iii) Any available drug counseling, rehabilitation, and employee assistance programs; and
  - (iv) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
- (c) Provide all employees engaged in the performance of the Contract with a copy of the statement required by subparagraph (a) of this provision;
- (d) Notify such employees in writing in the statement required by subparagraph (a) of this provision that, as a condition of continued employment on the Contract resulting from this solicitation, the employee will:

- (i) Abide by the terms of the statement; and
- (ii) Notify the employer in writing of the employee's conviction under a criminal drug statute for a violation occurring in the workplace no later than five (5) calendar days after such conviction;
- (iii) Notify the Contracting Officer in writing within ten (10) calendar days after receiving notice under Subdivision (d)(2) of this provision, from an employee or otherwise receiving actual notice of such conviction. The notice shall include the position title of the employee; and
- (iv) Within thirty (30) calendar days after receiving notice under subdivision (d)(2) of this provision of a conviction, take one of the following actions with respect to any employee who is convicted of a drug abuse violation occurring in the workplace:
  - (1) Take appropriate personnel action against such employee, up to and including termination; or
  - (2) Require such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local health, law enforcement, or other appropriate agency.
- (e) Make a good faith effort to maintain a drug-free workplace through implementation of subparagraphs (a) through (d) of this provision.
- (f) By submission of its offer, the offeror, if an individual who is making an offer of any dollar value, certifies and agrees that the offeror will not engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in the performance of the contract resulting from this solicitation.
- (g) In addition to other remedies available to the PHA, the certifications required by this provision concern a matter within the jurisdiction of an agency of the United States and the making of a false, fictitious, or fraudulent certification may render the maker subject to prosecution under title 18, United States Code, section 1001.

#### **10. PHA Fraud Policy**

The offeror certifies that he/she has read the following PHA Fraud Policy, will adhere to it, and is aware of the penalties for failure to comply:

- (a) For purposes of this policy, and in concurrence with the PHA Office of Inspector General's (OIG) mandate, "fraud" includes: fraudulent activity by any person employed by or contracting with the PHA; bribery and official

corruption; theft of PHA funds, property or benefits; and serious breaches of integrity. Some examples of activities covered include: extortion/extortion attempts by PHA employees or officials; acceptance or solicitation of bribes; submission of fraudulent documents; employee collusion with contractors or vendors; material misstatements of facts in contracts or documents, relating to services performed or materials provided; bid rigging; and disclosure of confidential information.

(b) Covered Parties

- (i) All PHA employees and officials.
- (ii) All contractors, subcontractors, vendors and consultants doing business with the PHA -

**NOTE: Contractors are responsible for compliance with this Fraud Policy by their subcontractors.**

- (iii) All owners of housing who receive subsidies from PHA.
- (iv) Any other individual or entity doing business with or seeking to do business with the PHA.

(c) Responsibilities

- (i) All "covered" parties" must report any type of fraud when they become aware of such activity, and they must cooperate fully with the OIG in any ensuing investigation.
- (ii) "Fraud" must be reported to a representative of the PHA's OIG, 1101 Market Street, Suite 1320, Philadelphia, PA 19107, (215) 684-8300.
- (iii) Management officials will support the Fraud Policy and ensure compliance with this policy by persons they supervise, and/or individuals and business entities that they deal with.

(d) Penalties For Failure To Report Fraud

Penalties for failure to timely report fraud can include: loss of contract and/or debarment from future contracts by contractors, subcontractors, vendors, and any other individual or entity doing business with the PHA; and other action deemed appropriate by PHA officials.

(e) Confidentiality

All information reported to the OIG is confidential, and the identity of those reporting information to the OIG will be protected.

(f) Whistle Blower Protection

- (i) Anyone who provides information to the OIG may not be discharged, demoted or otherwise subject to any adverse action as a result of reporting wrongdoing. Any person who retaliates against someone for reporting wrongdoing may be subject to civil liabilities and penalties.
- (ii) PHA Management supports the position that "whistle blowers" will be protected and commended for their honesty and dedication to the PHA.

(g) Authorized Negotiators

The offeror represents that the following persons are authorized to negotiate on its behalf with the PHA in connection with this request for proposals:  
(list names, titles, and telephone numbers of the authorized negotiators):

Richard K. Barnhart- Chairman & CEO

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Mark H. Dambly - President


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Timothy I. Henkel - Senior Vice President

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**11. Offeror's Signature**

Pursuant to 28 U.S.C. § 1746, I declare under penalty of perjury that the information contained in the foregoing certifications and representations is true and correct.

 11/11/14  
\_\_\_\_\_  
Signature & Date

Timothy I. Henkel  
\_\_\_\_\_  
Typed or Printed Name

Senior Vice President  
\_\_\_\_\_  
Title





NON-COLLUSIVE AFFIDAVIT  
(required if Certification & Representation Clause 5(e) is selected)

State of Pennsylvania  
County of Philadelphia

Timothy I. Henkel, being first sworn, deposes and  
says: That he/she is Senior Vice President (president, sole owner, partner,  
etc.) of Pennrose Properties LLC. (firm name) the party  
making the forgoing proposal or bid, that such proposal or bid is genuine and not collusive  
or sham; that no one conspired, connived or agreed, directly or indirectly, with any bidder  
or person, to put in a sham bid or to refrain from bidding, and has not in any manner,  
directly or indirectly sought by agreement or collusion, or communication or conference,  
with any person, to fix the bid price of the affiant or of any other bidder, or to fix any  
overhead, profit or cost element of said bid price, to secure any advantage against the  
Philadelphia Housing Authority or any person interested in the proposed contract: and that  
all statements in said proposal or bid are true.

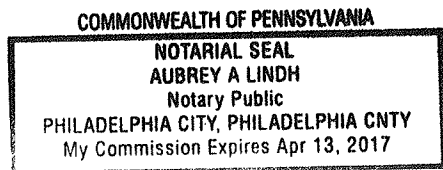
By Aubrey A. Lindh

Title Notary  
(Affix Corporate Seal if required)

Subscribed and sworn to before me  
this 11 day of November, 2014

My commission expires April 13, 2017

(Notary Seal Required)



Acknowledgement of Receipt of Addendum NO. 1 for solicitation NO. P-004440  
dated October 7, 2104

I Timothy I Henkel do hereby acknowledge receipt of Addendum NO. 1 for  
solicitation NO. P-004440 dated October 7, 2104.



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Timothy I. Henkel  
Senior Vice President



**Philadelphia Housing Authority**  
Building Beyond Expectations

3100 PENROSE FERRY RD | P215.084.4090  
PHILADELPHIA, PA 19145 | www.PHA.PHILA.G

October 7, 2014

TO: ALL POTENTIAL OFFERORS

RE: ADDENDUM NO. 1 for Solicitation P-004440, "Unit-Based Operating Subsidy Program"

Dear Sir/Madam:

Attached is Addendum No. 1 dated October 7, 2014 in regard to the above referenced solicitation. This addendum shall be attached to the noted solicitation and take precedence over the same.

All offerors must acknowledge receipt of this addendum on page H-3 of their solicitation packages.

If you should have any questions, please contact William Cook at (215) 684-4223.

Sincerely,  
Philadelphia Housing Authority

William Cook  
Senior Sourcing Manager - Procurement

Attachment: Addendum No. 1

cc: File P-004440



**Philadelphia Housing Authority**  
Building Beyond Expectations

3100 PENROSE FERRY RD | P215.084.4000  
PHILADELPHIA, PA 19145 | www.PHA.PHILA.G

**THE PHILADELPHIA HOUSING AUTHORITY**  
3100 Penrose Ferry Road, Philadelphia, PA 19145  
ADDENDUM NO. 1  
Dated October 7, 2014 for  
Solicitation No. P-004440  
"Unit-Based Operating Subsidy Program"

This addendum shall be attached to the noted solicitation and shall take precedence over the same and previous addenda. Any items not mentioned herein nor affected hereby shall be performed strictly in accordance with the original specifications, drawings, and previous addenda thereto.

ITEM 1: Sections: A, B, D, E, F H, J and K have been omitted from this solicitation.

ITEM 2:

The initial award that will be provided under this RFP is a Letter of Commitment to enter into negotiations for a Mixed Finance Transaction to provide public housing operating subsidy to all or a portion of the units in the proposed development. A Mixed Finance Transaction consists of the negotiation and execution of a Regulatory and Operating Agreement and other documents as required by PHA and/or HUD, and is subject to HUD approval. The Letter of Commitment is further subject to the development receiving an award of four or nine percent tax credits from the Pennsylvania Housing Finance Agency, further due diligence by PHA and approval by the Board of Commissioners.

End of Addendum