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**TULSA COUNTY**  
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**PURCHASING  
DEPARTMENT**

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# MEMO

DATE: JUNE 24, 2015  
TO: BOARD OF COUNTY COMMISSIONERS  
FROM: LINDA R. DORRELL  
PURCHASING DIRECTOR   
SUBJECT: ACCEPTANCE OF RFP- ELDERLY HOUSING

IT IS THE RECOMMENDATION OF INCOG AND THE TULSA COUNTY PURCHASING DEPARTMENT TO ACCEPT THE PROPOSAL FOR ELDERLY HOUSING FROM THE FOLLOWING VENDOR:

**VINTAGE HOUSING, INC., IN THE TOTAL AMOUNT OF \$1,344,981.00**

THIS WAS THE ONLY RESPONDENT TO THE REQUEST FOR PROPOSALS. SEE ATTACHED. THIS AWARD IS CONTINGENT UPON THE AWARD OF AHP FUNDING FROM THE FHLB TOPEKA.

THIS RECOMMENDATION IS RESPECTFULLY SUBMITTED FOR YOUR APPROVAL.

LRD/tah

ORIGINAL: PAT KEY, COUNTY CLERK, FOR THE JUNE 29, 2015 AGENDA.

COPIES: COMMISSIONER JOHN M. SMALIGO  
COMMISSIONER KAREN KEITH  
COMMISSIONER RON PETERS  
MICHAEL WILLIS, CHIEF DEPUTY  
VICKI ADAMS, CHIEF DEPUTY  
CLAUDIA BRIERRE, INCOG



a voluntary association of local governments serving Creek, Osage, Rogers, Tulsa and Wagoner Counties

2 West 2<sup>nd</sup> Street, Suite 800 Tulsa, Oklahoma 74103-3123 918.584.7526 www.incog.org

## MEMORANDUM

TO: Linda Dorrell, Purchasing Director

FROM: Claudia Brierre

DATE: June 23, 2015

RE: AWARD OF PROPOSAL FOR **HOME CONSORTIUM** FY2014/2015 FUNDS-  
CONSTRUCTION OF ELDERLY CONGREGATE HOUSING

Tulsa County, as the lead entity for the Metropolitan Tulsa HOME Consortium, solicited Requests for Proposals for Elderly Congregate housing from the Consortium's Community Housing Development Organizations (CHDOs). Proposals were received by the County on June 8, 2015. One CHDO responded to the RFP. Vintage Housing, Inc., an affiliate of LIFE Senior Services, submitted a proposal for the construction of four duplexes (8 units) for elderly occupants to be located in Broken Arrow. The name of the proposed development will be Kenosha Villas. The proposed project is to be located at 2617-2721 W. Princeton Street in Broken Arrow. This site is immediately north of the 40-unit Kenosha Landing elderly apartments developed and owned by Vintage Housing. As you may remember, Vintage Housing has been awarded Consortium funding for the last 20 years for the construction of elderly housing in Jenks, Coweta, Sapulpa, Broken Arrow, Collinsville, Bixby, Skiatook, Bristow, Glenpool, Owasso, and Sand Springs.

The RFP amount available for funding is \$1,344,981.00 in Consortium HOME funds and Vintage Housing has requested the full amount. Summary information regarding the proposed project and letters of community support submitted by Vintage Housing are attached. Staff has reviewed the application for completeness and eligibility, and has found it to be acceptable.

Total development costs for this project are proposed to be \$1,799,733.00. In addition to the HOME funds, Community Development Block Grant funds from the City of Broken Arrow will be utilized for infrastructure improvements and Affordable Housing Program (AHP) funds from the Federal Home Loan Bank Topeka will assist in construction costs. The application for AHP through FHLB Topeka is pending.

A project agreement between Tulsa County, as lead entity for the Metropolitan Tulsa HOME Consortium, and Vintage Housing, Inc. will be prepared upon approval of the AHP funding commitment from FHLB Topeka and upon completion of all necessary documentation for use of HOME funds.

HOME Elderly Housing Award  
June 23, 2015  
Page Two

**Recommendation:** INCOG staff recommends that the Board of County Commissioners approve the proposal of Vintage Housing for the new construction of 4 duplexes (8 units) elderly congregate housing project in the City of Broken Arrow in the amount of \$1,344,981.00, contingent upon the award of AHP funding from the FHLB Topeka.

**FOR MONDAY, JUNE 29, 2015 COMMISSION AGENDA**

**Metropolitan Tulsa HOME Consortium  
FY2014/2015 Elderly Rental Housing  
Selection Criteria**

**Threshold:**

- a. Site Control: as evidenced by**
  - 1. Deed; or X
  - 2. Contract for Sale; or
  - 3. Option to Purchase Agreement
- b. Zoning Compliance:**
  - Evidence of permissive zoning from appropriate local authority X
- c. Utilities:**
  - Evidence that utilities are available to site from appropriate public and private utilities X
- d. Preliminary Site Plan Approval:**
  - Preliminary Site Plan approval documentation from local authority X
- e. Subsidy Layering:**
  - Project meets Metropolitan Tulsa HOME Consortium Subsidy Layering Guidelines (See **Attachment C**). X

<b>Selection Criteria</b>	<b>Maximum Points</b>	<b>Vintage Points</b>
<b>Documentation of Need: as evidenced by market analysis and other data</b>	<b>10</b>	<b>10</b>
<b>Leverage:</b>	<b>7</b>	<b>7</b>
<b>HOME Cost Per Unit:</b>	<b>8</b>	<b>8</b>
<b>Extent of Long-term Affordability beyond minimum required for HOME program:</b>	<b>10</b>	<b>10</b>
<b>Capacity of Development Team:</b>	<b>25</b>	<b>25</b>
a. Sponsor's successful track record	7	7
b. Developer's successful track record	8	8
c. Management agent's successful experience	8	8
d. Oklahoma company/individual	2	2
<b>Support Services:</b>	<b>10</b>	<b>10</b>
a. On-site services provided (with commitment letters)	10	10
b. Off-site services provided only (with commitment letters)	5	
c. No service commitments provided	0	



<b>Community Support:</b>	<b>10</b>	<b>10</b>
a. Documentation of support from local government	5	5
b. Documentation of support from community organizations	5	5
c. No documentation provided	0	
<b>Match Generation:</b>	<b>10</b>	<b>5</b>
a. Generates 100% match for Consortium	10	
b. Generates 75% match for Consortium	5	5
c. Generates match for project only	2	
<b>Readiness to Proceed:</b>	<b>10</b>	<b>7</b>
a. Financing		
1. Funding commitments of other sources secured	5	5
2. Funding applications of other sources pending	2	2
3. Funding applications of other sources to be submitted	0	
b. Environmental		
1. Site has no known environmental problems	3	3
2. Site has known environmental problems that can be remedied	0	
c. Displacement		
1. No displacement will occur	2	2
2. Displacement will occur	0	
<b>TOTAL</b>	<b>100</b>	<b>97</b>

**Metropolitan Tulsa HOME Consortium  
Request For Proposals for  
FY2014/2015  
Elderly Rental Housing**

**Project Information.**

Project Sponsor: Vintage Housing Inc.

Contact Person: Name Vicki Jordan  
Address 5950 E. 31<sup>st</sup> St.  
City, State, Zip Tulsa, OK 74135  
Phone (918) 664-9000  
Fax (918) 664-9922  
Email VJordan@LIFE SeniorServices.org

CHDO Role:  Owner  Developer  Sponsor

HOME funds requested: \$1,344,981 Total Project Cost: \$1,799,733

Number of HOME units: 8 Total Units in Project: 8

HOME investment per HOME unit: \$168,123 (HOME funds/# of HOME units)

Project Name: Kenosha Villas

Location: 2617-2721 W. Princeton St., Broken Arrow, OK 74012  
Location map can be found behind **Tab A**.

Type of Structure: New construction of 2-bedroom duplexes

Square Footage: 11,768 in total for 4 duplexes; 2,942 for each duplex

Project Description: Kenosha Villas will be completed in phases, this being the first phase and consisting of 4 duplexes, or eight units. All units will be available to individuals age 62 and older who are able to live independently. Each units will have 2 bedrooms.

Property Information: Is this property in a flood plain? Yes  No

**Neighborhood Market Analysis (20 units or less)**

For all developments of up to twenty (20) units, a Neighborhood Market Analysis must be included with the application that includes all of the documentation requirements listed in Attachment B. For a development of up to twenty (20) units, applicants may perform their own scientifically based housing market analysis. Such studies must fully describe the methodology used and sources of all data and information. The applicant/developer must define the physical boundaries of the neighborhood where development is proposed. The neighborhood market analysis must include an evaluation of the location and characteristics of the housing and residents in the proposed neighborhood.

**Market Study for Developments of More than Twenty (20) Units.**

Applicants must submit a third party, independent housing market study. The analysis must be prepared by a market analyst, unaffiliated with the applicant, owner or developer, who has experience with single or multi-family rental or single-family homeownership housing, depending on the proposal. Applicants are required to submit an electronic copy of their full market study along with their regular application materials. This electronic version may be in the form of a CD, stick/flash drive, other electronic storage device, or e-mail attachments, in addition to, and not a substitution for, the regular hard copy of the study.

See **Tab B** "Neighborhood Market Analysis/Market Study for the HOME Program under the 2013 HOME Rule" for complete submittal requirements. Label Neighborhood Market Analysis or Market Study submission as **Exhibit 1**.

**Sources of Funds.** List sources of financing and equity in the project including construction financing, permanent financing, grants, donations and sweat equity. Attach letters of commitment, if available. Identify each source as to type by noting (L) for Loan, (G) for Grant or (E) for Equity. Indicate whether proposed, requested or approved in status column.

Source	Type	Amount	Terms	Status
AHP	G	\$240,000	30yr	Requested
HOME	G	\$1,344,981	30yr	Requested
CDBG	G	\$62,000	30yr	Approved
BANCFIRST	L	\$152,752	30yr	Requested

Total Development Cost \$1,799,733



**Use of Funds.** Categorize and list the expected uses of funds. Attach a separate 10-year Pro-forma analysis and label as **Tab C**.

**Match Generation.** Describe how eligible match will be generated (if any provided).

AHP application for \$240,000 was submitted April 13, 2015. The AHP funds will count toward Match. Awards will be announced on October 1, 2015.

**Number of Units by Type.**

Number of Total Units 8  
Number of Non-income Units 0  
Number of Elderly Units 8  
Number of units above 80% of median income 0  
Number of units between 60%-80% of median income 6  
Number of units between 51%-60% of median income     
Number of units at 50% or below of median income 2  
Number of units for physically disabled 0  
Number of units for sensory impaired 0

**Readiness to Proceed.** Documented readiness to proceed, as demonstrated by the below:

- (A) Evidence of Site Control in the form of a deed, or contract for sale, or option to purchase agreement;
- (B) Evidence of compliance with all applicable local land use and zoning ordinances and, if conditional use permits or variances are necessary, proof to the Consortium's satisfaction (i.e. a letter from the applicable local authority) that a conditional use permit or variance can be obtained before funding commitment is made; and
- (C) Evidence of all necessary utilities available to the site;
- (D) Evidence of Site Plan approval from the local jurisdiction where the proposed development is to be located.

Label documentation as **Tab D** and check documentation attached:

- Site Control documents
- Zoning compliance
- Utilities
- Site Plan approval (Preliminary or Final)
- BancFirst Letter
- Copy of AHP application
- Letter re CDBG award

Estimated project start date October 1, 2015

Estimated project completion date April 1, 2016



**Support Services.** Describe any support services (such as nutrition or transportation) available to residents of the project and indicate whether the services will be provided on-site or at sites off the property. Attach letters of commitment from service providers.

The following support services will be available on site unless otherwise noted. Commitment letters from the service providers accompany this application behind **Tab E**.

A Resident Planning Committee will be formed by Sooner Management Consultants, Inc. which will be the Kenosha Villas' leasing and property management company. The Committee will meet monthly at the site of Kenosha Landing, the affordable senior housing project located immediately to the south of Kenosha Villas, to plan social activities and events and address any resident concerns.

Vintage Housing Inc., an affiliate of LIFE Senior Services, will offer the services of its Housing Services Coordinator who will attend the Resident Planning Committee meetings and assist Kenosha Villas and its residents in activity planning and provide information to residents regarding services that could be provided by LIFE Senior Services and other area agencies. Copies of *The Vintage Newsmagazine*, a newspaper for older adults in the greater Tulsa area which is full of articles of interest to seniors and includes a monthly calendar of events to guide them towards opportunities for enriching life experiences, will be provided.

LIFE Senior Services, Inc. will provide an Independent Case Manager to be available to meet with residents of Kenosha Villas on a regular basis and assist them in discovering whether case management services could be beneficial for them.

RSVP will provide financial education and/or credit counseling programs at least once per year at Kenosha Landing. The program will be 45-60 minutes, including time for question and answer. The program will educate residents about how to avoid recurring debts that cannot be repaid through establishing an effective debt management plan or budget. Programming is intended to help residents achieve their personal financial goals.

Legal Aid Services of Oklahoma will provide an attorney with experience in tenant/landlord rights, to put on a program at Kenosha Landing for the residents of Kenosha Villas at least once per year. The program will be 45-60 minutes and include time for question and answer. The program will help residents better understand their rights and responsibilities associated with leases and rental agreements, landlord repair maintenance, landlord/tenant rights, termination of rental agreements, security deposits and dispute resolution.

**Community Support.** Describe endorsements from local unit of government and other community organizations. Provide documentation of evidence of local support for the project in the form of letters of endorsement. Points will be awarded only for those groups referenced that are supported by a letter or other suitable written documentation.

Kenosha Villas will receive community support from the following entities, as evidenced by documents that accompany this application:

City of Broken Arrow –see letter behind **Tab D**

Vintage Housing – see letter behind **Tab E**

LIFE Senior Services – see letter behind **Tab E**

RSVP – see letter behind **Tab E**

Legal Aid – see letter behind **Tab E**

**Long-term Affordability.** Indicate the number of years the project will be retained as affordable housing and how this will be accomplished (i.e. land covenants, deed restrictions, second liens, low-income housing tax credits, etc.)

Kenosha Villas will be restricted to affordable housing for a period of twenty (20) years pursuant to a regulatory agreement so stating, and will be filed of record in the Office of the County Clerk for Tulsa County.

**Capacity of Development Team.** Describe the sponsor's record of performance, qualifications and capacity to carry out project responsibilities. Describe the specific role of the sponsor (developer, owner, investor, manager, etc.). If a management firm will be used for operation of the project, describe the management firm's capacity.

Kenosha Villas development team consists of: 1) Vintage Housing Inc., an Oklahoma nonprofit company headed by Laura Kenny, CEO, as the owner, co-developer and sponsor; 2) Ronald E. Smith and Shari Singleton-Smith as co-developer; 3) Resco, LLC as contractor; 4) Sooner Management Consultants, Inc. as the property leasing and management company; and 5) Mike Chase of Chase Fetters Hewitt as architect.

The development team outlined above has together built 16 open congregate housing developments in northeastern Oklahoma, and is currently constructing the 17<sup>th</sup> property. Each of the properties has received HOME Investment Partnership Program funds.

Pioneer Village, Jenks	40 units	Opened Oct. 1996
Carriage Crossing, Coweta	40 units	Opened Dec. 1997
Country Oaks, Tulsa	48 units	Opened Jan. 1999
Hickory Crossing, Sapulpa	40 units	Opened Jul. 1999
Vandever House, Broken Arrow	48 units	Opened Apr. 2000
Cardinal Heights, Collinsville	40 units	Opened Nov. 2000
Park Village, Tulsa	44 units	Opened May 2001
Autumn Park, Bixby	40 units	Opened Oct. 2001



West Oak Village, Skiatook	40 units	Opened Aug. 2003
Cornerstone Village, Tulsa	40 units	Opened Sept. 2004
Woodland Village, Bristow	32 units	Opened Dec. 2005
Redbud Village, Glenpool	36 units	Opened Mar. 2008
Prairie Village, Owasso	40 units	Opened Mar. 2009
Heritage Landing, Tulsa	40 units	Opened Oct. 2010
Kenosha Landing, Broken Arrow	40 units	Opened May 2011
Heartland Village, Sand Springs	40 units	Opened May 2012
Brookhollow Landing, Tulsa	40 units	<i>Under construction</i>

Additional information demonstrating the performance, qualifications, and capacity of the development team members to carry out their project responsibilities accompanies this application behind **Tab F**.



\_\_\_\_\_  
Signature of Authorized Individual

6-4-15

\_\_\_\_\_  
Date

Vicki Jordan, Director of Housing, Vintage Housing Inc.  
Type Name & Title



April 22, 2015

Ms. Laura Kenny, Executive Director  
Vintage Housing, Inc.  
5950 East 31st Street  
Tulsa, OK 74135

Dear Ms. Kenny:

RE: Kenosha Villas, Broken Arrow, Tulsa County, OK


On April 21, 2015, the Broken Arrow City Council approved a grant of Community Development Block Grant (CDBG) funds in the amount of \$61,740 to Vintage Housing, Inc. for the construction of an elderly housing duplex development to be located at 2617-2721 West Princeton Street in Broken Arrow. The project, Kenosha Villas, will consist of four (4) duplexes comprising eight (8) units. CDBG funds will assist in roadway improvements to support development of the elderly housing project.

As said funding commitment is a grant, and not a loan, there are no applicable terms or rates.

The following information pertains to this grant award and funding commitment:  
CFDA title and number: Community Development Block Grant Program (14.218)  
Amount of award: \$61,740.00  
Award name: CDBG infrastructure for HOME Consortium Elderly Housing  
Name of federal agency: Department of Housing and Urban Development

We appreciate your continued interest in providing affordable housing in our community, and commit Broken Arrow CDBG funds to further that purpose. If you have any questions regarding this commitment, please contact me.

Sincerely,

  
Craig Thurmond  
Mayor





June 3, 2015

Ms. Claudia Brierre  
Community & Economic Development Co-Manager  
INCOG  
2 West Second Street  
Suite 800  
Tulsa, OK 74103

**Vintage Housing, Inc.**  
5950 East 31st Street  
Tulsa, OK 74135-5114  
918-664-9000  
Fax: 918-664-9922

Dear Ms. Brierre:

**[www.seniorline.org](http://www.seniorline.org)**

Vintage Housing, an affiliate of LIFE Senior Services, Inc., will help meet the needs of the Kenosha Villas residents through its Housing Services Coordinator.

Each new resident at Kenosha Villas will receive a letter from the Housing Services Coordinator in which she states that (1) LIFE's mission is to help older adults by "providing information, education and services that encourage continued independence, quality of life, and dignity," and that (2) residents are encouraged to contact her if they have questions of a personal nature.

Equally important, the Housing Services Coordinator will attend the monthly Resident Planning Committee meetings at Kenosha Landing, which meeting will include the Kenosha Villas residents, and will offer suggestions when planning social activities, health screenings and other events planned by the Committee. Because the Housing Services Coordinator also attends the monthly Resident Planning Committee meetings at each of the other Vintage Housing developments, she is able to share information about events that have proven to be appreciated and successful at the other developments.

Kenosha Villas residents will not be charged for the services rendered by the Housing Services Coordinator, and Vintage Housing intends to offer such services throughout the affordability period.

It is our pleasure to serve the residents of Kenosha Villas. Please do not hesitate to contact me if you have any questions.

Sincerely,

Vicki D. Jordan  
Director of Housing



Promoting  
and Preserving  
Independence  
for Seniors.

Today -  
Tomorrow  
Always.

**(918) 664-9000**  
[www.LIFEseniorservices.org](http://www.LIFEseniorservices.org)

**Adult Day Health**  
**Caregiver Support Services**  
**Community Education**  
**Care Management Services**  
**Medicare Assistance  
Program**  
**Senior Centers**  
**SeniorLine Information  
& Resource Counseling**  
**Vintage Housing**  
**LIFE PACE**  
**Vintage Guide to  
Housing & Services**  
**Vintage Newsmagazine**

**Central Tulsa**  
5950 E. 31st St.  
Tulsa, OK 74135-5114

**North Tulsa**  
902 E. Pine St.

**Broken Arrow**  
3106 S. Juniper Ave.



June 3, 2015

Ms. Claudia Brierre  
Community & Economic Development Co-Manager  
INCOG  
2 West Second Street  
Suite 800  
Tulsa, OK 74103

Dear Ms. Brierre:

LIFE Senior Services, Inc., of which Vintage Housing is an affiliate, will help meet the individual needs of Kenosha Villas residents in several ways, one of which is through offering case management services. LIFE is a 501(c)(3) nonprofit Oklahoma corporation that has provided assistance to seniors in the metropolitan Tulsa area since 1973. It is funded by private donations, various state and federal programs, and the Tulsa Area United Way.

LIFE will offer the services of an Independent Case Manager to visit Kenosha Villas on a regular basis and assist its residents in discovering whether case management services could be beneficial for them. The objective of case management is to enable seniors and others with physical disabilities to receive the health care services they require at their place of residence, and thereby avoid institutionalization in a nursing home. LIFE has offered case management services for 29 years.

Kenosha Villas residents who are determined to be financially and medically eligible to receive Medicaid will receive information regarding the Advantage Program. Residents do not have to choose LIFE to provide their case management services. Residents who do not qualify for the Advantage Program, may choose to utilize LIFE for its independent case management services at no charge.

It is our pleasure to work with the residents of Kenosha Villas. Please do not hesitate to contact me if you have any questions.

Sincerely,

Laura Kenny  
Chief Executive Officer

*Sooner Management Consultants, Inc.*

120 South Yorkshire Blvd., Wagoner, Oklahoma 74467

Phone: (918) 485-8885, Fax (918) 485-8334

TDD# 1-800-722-0853 or #711

Application Date: April 13, 2015  
Project Sponsor/Owner: Vintage Housing, Inc.  
Partnering Institution: Sooner Management Consultants, Inc.  
Has approved support: Vintage Housing, Inc.  
For the project known as: Kenosha Villas  
Located at: 2617 - 2721 W. Princeton St., Broken Arrow, OK 74012

Provide a detailed explanation of the commitment being made for each factor checked below in the space following the list.

- Sweat equity (minimum participation of 50% of homeowners);
- Homebuyer / homeowner education (minimum participation of 50% of homeowners);
- Financial Educational and / or credit counseling programs;
- Resident Involvement in decision-making affecting the creation and/or operation of the project
- Assistance to find or sustain employment and/or job training;
- Formal Education courses (GED, ESL, literacy);
- Tenant Counseling (minimum participation of 20% of the rental units);

The Promotion of Empowerment services made for the project listed above are more specifically described as:

Sooner Management will create a Resident Council at Kenosha Villas. The Council shall be comprised of the site manager, Housing services Coordinator, and up to four residents. It will meet once a month in the common meeting area at Kenosha Landing, located immediately next door, and will be involved with the planning of activities and programming for the residents. Considered activities and programming will include bus trips, nutrition classes, games, pot-luck dinners, and movies among other things. Further the Council will offer suggestions and provide input for site/community improvements. Residents will file for membership on the Council. Minutes of the meetings will be kept. The anticipated benefits to the residents include socialization to aid in eliminating loneliness and isolation, as well as offering opportunity for leadership and community involvement.

The signatures below acknowledge that upon award of funds, the commitment(s) made could require additional documentation during initial monitoring to verify the commitment(s) were fulfilled.

*Alroy Anthony*  
Partnering Institution or Organization

4/16/15  
Date

*[Signature]*  
Project Owner

4-16-15  
Date



"This institution is an equal opportunity provider and employer."





# RSVP

ATTACHMENT A - PROMOTION OF EMPLOYMENT SERVICES SAMPLE  
Fill-in all applicable spaces  
**Lead. Inspire. Change the World. Again.**  
"We Connect Volunteers to Community Needs"

Application Date:	4/13/2015
[Project Sponsor/Owner]	Vintage Housing Inc.
[Partnering Institution/Organization]	RSVP
Has approved support to [Owner/Sponsor]	Vintage Housing Inc.
For the project known as [Project Name]	Kenosha Villas
Located at [Address]	2617- 2721 W. Princeton St. Broken Arrow, OK 74012

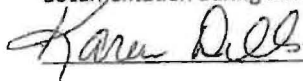
Provide a detailed explanation of the commitment being made for each factor checked below in the space following the list. Use additional sheets as necessary.

- Sweat equity (minimum participation of 50% of homeowners);
- Homebuyer/homeownership education (minimum participation of 50% of homeowners);
- Financial Educational and/or credit counseling programs;
- Resident Involvement in decision-making affecting the creation and/or operation of the project;
- Assistance to find or sustain employment and/or job training;
- Formal Education courses (GED, ESL, literacy);
- Tenant Counseling (minimum participation of 20% of the rental units);

The Promotion of Empowerment services made for the project listed above are more specifically described as:

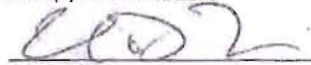
RSVP will provide a retired person with a background in finance, to put on a program at least once per year, at Kenosha Landing for the residents of Kenosha Villas. The program will be 45-60 minutes, including time for question and answers. The program will educate residents about how to avoid recurring debts that cannot be repaid through establishing an effective debt management plan or budget. Programming is intended to help residents achieved their personal financial goals.

The signatures below acknowledge that upon award of funds, the commitment(s) made could require additional documentation during initial monitoring to verify the commitment(s) were fulfilled.

  
\_\_\_\_\_

[Partnering Institution or Organization]

[Date:] 4-13-15

  
\_\_\_\_\_

[Project Owner]

[Date:] 4-16-15



# LEGAL AID SERVICES OF OKLAHOMA, INC.

**ATTACHMENT A – PROMOTION OF EMPOWERMENT SAMPLE LETTER**

Fill in all applicable spaces

Application Date:	<u>4/13/2015</u>
[Project Sponsor/Owner]	<u>Vintage Housing Inc.</u>
[Partnering Institution/Organization]	<u>Legal Aid Services of Oklahoma</u>
Has approved support to [Owner/Sponsor]	<u>Vintage Housing Inc.</u>
For the project known as [Project Name]	<u>Kenosha Villas</u>
Located at [Address]	<u>2817- 2721 W. Princeton St. Broken Arrow, OK 74012</u>

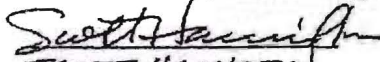
Provide a detailed explanation of the commitment being made for each factor checked below in the space following the list. Use additional sheets as necessary.


- Sweat equity (minimum participation of 50% of homeowners);
- Homebuyer/homeownership education (minimum participation of 50% of homeowners);
- Financial Educational and/or credit counselling programs;
- Resident involvement in decision-making affecting the creation and/or operation of the project;
- Assistance to find or sustain employment and/or job training;
- Formal Education courses (GED, ESL, literacy);
- Tenant Counseling (minimum participation of 20% of the rental units);

The Promotion of Empowerment services made for the project listed above are more specifically described as:

Legal Aid Services of Oklahoma will provide an attorney with experience in tenant/landlord rights, to put on a program at Kenosha landing for the residents of Kenosha Villas at least once per year. This program will be 45-60 minutes and include time for questions and answers. The program will help residents better understand their rights and responsibilities associated with leases and rental agreements, landlord repair maintenance, landlord/tenant rights, termination of rental agreements, security deposits, and dispute resolution.

The signatures below acknowledge that upon award of funds, the commitment(s) made could require additional documentation during initial monitoring to verify the commitment(s) were fulfilled.

  
**SCOTT HAMILTON**  
 [Partnering Institution or Organization]

  
 [Project Owner]

[Date:] 4-16-15

[Date:] 4-16-15

**SCOTT HAMILTON, MANAGING ATTY**  
**LEGAL AID SERVICES OF OKLAHOMA**  
**907 S. DETROIT AVE., SUITE 725**  
**TULSA, OK 74120**  
 Revised 12/29/2014  
**PHONE: 918-295-9428**

## Resco Enterprises, L.L.C

1917 West "C" Street  
Jenks, Okla. 74037-2367  
Phone 918-298-0052  
Fax 918-298-0966

Email [RonESmith@rescoentrinc.com](mailto:RonESmith@rescoentrinc.com)

4/6/2015

Vintage Housing Inc,  
5950 East 31's St.  
Tulsa, OK 74135

Attention: Vicki Jordan

Dear Miss Jordan;

Please accept this letter as our intent to develop for Vintage Housing Inc. four (4) Duplex Lots and erect duplex structures on land to be platted as 2721/2717, 2713/2709, 2705/2701, and 2621/2617 W. Princeton St., Kenosha Villas, ( copy of proposed addressed plat attached) Broken Arrow, Ok..

Sincerely,



Ronald E. Smith  
Manager



200 East Main  
Post Office Box 2003  
Jenks, Oklahoma 74037-2003  
Telephone (918)299-5081  
Fax (918)299-5963

April 13, 2015

Vintage Housing  
5950 E. 31<sup>st</sup> St.  
Tulsa, OK 74135

Attn: Vickie Jordan

RE: AHP Funding Kenosha Villas

Vintage Housing has notified BancFirst Jenks of their intent to apply for construction and permanent financing of more than 5% of the total development cost for Kenosha Villas, an elderly housing duplex project in Broken Arrow. Furthermore, they have requested the bank provide a letter evidencing our interest in this transaction.

Vintage Housing and BancFirst together have successfully completed several projects of this nature. Please allow this letter to serve as your notification that the bank looks forward to receiving an application for this Broken Arrow project and to advancing a proposal for construction and permanent financing of the project.

Sincerely,

Chris W. Smith, President

**SANDERS ENGINEERING, INC.**

*Civil Engineering Services*

**ROBERT DAVID SANDERS, P.E.**

Vickie Jordan  
Life Senior Services  
5950 East 31st Street  
Tulsa, OK 74135

June 1, 2015

RE: Availability of Utilities

Vickie:

This letter concerns the availability of utilities to serve the proposed Kenosha Villas duplex project in Broken Arrow, Oklahoma. There is evidence of all necessary utilities available to the site, as provided by the following suppliers:

Electric Power - Public Service Company of Oklahoma  
Natural Gas - Oklahoma Natural Gas  
Telephone - Windstream Communications  
Cable/Digital TV - Cox Communications  
Water - City of Broken Arrow, OK  
Sanitary Sewer - City of Broken Arrow, OK

Please advise me if you require additional information concerning this matter.

Regards,



Robert D. Sanders, P.E.  
Sanders Engineering, Inc.