

# Affordable Housing Common Funding Application



Affordable Housing Bond

Affordable Housing Development Reserve

Affordable Housing Fund



Town of Chapel Hill Office for Housing and Community

[housingandcommunity@townofchapelhill.org](mailto:housingandcommunity@townofchapelhill.org)

919-969-5079

[www.townofchapelhill.org/town-hall/departments-services/housing-and-community/funding](http://www.townofchapelhill.org/town-hall/departments-services/housing-and-community/funding)

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## GENERAL INFORMATION & APPLICATION INSTRUCTIONS

### OVERVIEW

Thank you for your interest in the Town of Chapel Hill's Affordable Housing funding sources! This application is used for funding requests for all of the Town's local funding sources for affordable housing projects (Housing Bond, Affordable Housing Development Reserve, and Affordable Housing Fund). To learn more about each of these sources and eligible uses, see the Attachments Section.

### INCOME ELIGIBILITY

In general, projects for the Town's affordable housing sources must serve households with income below 80% of the area median income as defined by the U.S. Department of Housing and Urban Development, adjusted for family size, though projects may be approved that serve households of higher incomes. Please see the Attachments for additional information about income limits.

### PROJECT REPORTING AND MONITORING

Organizations must submit progress reports to the Town quarterly to monitor progress and performance, financial and administrative management, and compliance with the terms of the performance agreement. Please submit reports using the template linked on the Town website and in the Attachments section electronically to: [housingandcommunity@townofchapelhill.org](mailto:housingandcommunity@townofchapelhill.org).

### ORIENTATION MEETING

Applicants are invited to attend an optional orientation session prior to applying for funding, which will be held once per year and provide an overview of all of the Town's affordable housing sources.

Applicants are also invited to participate in a pre-application meeting, which is a one-on-one session during which applicants can discuss their funding proposal with Town staff. To schedule a pre-application meeting, contact Nate Broman-Fulks at 919-969-5077 or [nbfulks@townofchapelhill.org](mailto:nbfulks@townofchapelhill.org).

### SUBMISSION INSTRUCTIONS

Submit applications electronically in PDF form to: [housingandcommunity@townofchapelhill.org](mailto:housingandcommunity@townofchapelhill.org). Note that the Project Financials attachment asks for an Excel document, or similar file format, rather than a PDF. If you have questions, please contact: Nate Broman-Fulks at 919-969-5077 or [nbfulks@townofchapelhill.org](mailto:nbfulks@townofchapelhill.org)

Applications may not be considered for the following reasons:

1. Projects are not located within the Town limits or the Town Extra-Territorial Jurisdiction
2. Projects do not have site control (if applicable)
3. Projects do not align with the eligibility criteria for the funding source
4. Incomplete or late applications

### CHECKLIST OF REQUIRED DOCUMENTATION

Application:

<input checked="" type="checkbox"/>	<b>Section 1:</b>	<b>Cover Page</b>
<input checked="" type="checkbox"/>	<b>Section 2:</b>	<b>Disclosure of Potential Conflicts of Interest</b>
<input checked="" type="checkbox"/>	<b>Section 3:</b>	<b>Organization Information</b>
<input checked="" type="checkbox"/>	<b>Section 4:</b>	<b>Project Information</b>
<input checked="" type="checkbox"/>	<b>Section 5:</b>	<b>Attachments</b>

<b>COVER PAGE</b>
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**Organization Contact Information**Legal Name: Community Home Trust

Tax ID Number: 56-214119

Physical Address: 105 Conner Drive, Ste 1000, Chapel Hill, NC 27514Mailing Address: PO Box 2315, Chapel Hill, NC 27515Organization's Website: www.communtiyhometruster.orgDate of Incorporation: 05/11/1999Executive Director Name: Kimberly SanchezTelephone Number: 919-967-1545E-Mail: ksanchez@communityhometruster.org**Funding Request**Project Name: 223 N. Graham St., Chapel HillTotal Number of Units Included in Funding Request: 1Total Project Cost: \$269,000Total Amount of Funds Requested: \$60,000Please specify the **type** and **amount** of funding requested: Affordable Housing Bond: \$\_\_\_\_\_ Grant Loan Affordable Housing Fund: \$\_\_\_\_\_ Grant Loan Affordable Housing Development Reserve: \$60,000 Grant Loan

**\*\*New this year.** If you're not requesting a loan, describe reasoning (the Town will analyze project financials, including debt coverage ratio, to explore the project's ability to support a loan): CHT uses the grant funds to reduce the cost of the home to the buyer by providing a no-interest, no-payment 2<sup>nd</sup> mortgage. By the funds being a grant to CHT, this allows us to roll over this subsidy from buyer to buyer, keeping it affordable for multiple generations.

Loan Terms Requested, if applicable, (provide a concise description, including interest rate, term length, amortization schedule): \_\_\_\_\_

Proposed Use of Funds Requested (*provide a concise description, not to exceed 100 words*): The funds will be used to purchase a renovated home from Self-Help as part of the Northside Neighborhood Initiative. We will then sell the home to an eligible buyer earning under 80% AMI at an affordable price (costs not to exceed 30% of their gross monthly income). The project budget is attached, but renovations include replacement of current deck, structural repairs to the subfloor, bathroom remodel, new roof, new flooring in part of the house, interior paint, exterior paint, and new light fixtures throughout, and misc. repairs.

**1. Type of Activity.** Please check the category under which your project falls.

- Acquisition
- Predevelopment activities
- Infrastructure/site improvements
- New construction for homeownership
- New construction for rental housing
- New construction of emergency shelter

- New construction of transitional/supportive housing
- Rental housing subsidy
- Homeownership assistance
- Owner-occupied rehabilitation
- Rental rehabilitation
- Other (*specify*): \_\_\_\_\_

**To the best of my knowledge and belief all information and data in this application is true and current. The document has been duly authorized by the governing board of the applicant.**

Signature: DocuSigned by:  
*Kimberly Sanchez*  
1BE8346B29ED45C...  
 Executive Director \_\_\_\_\_ Date 9/29/2021

**DISCLOSURE OF POTENTIAL CONFLICTS OF INTEREST AND NON DISCRIMINATION CLAUSE**

Are any of the Board Members or employees of the organization which will be carrying out this project, or members of their immediate families, or their business associates:

**YES NO**

- a) Employees of or closely related to employees of the Town of Chapel Hill?
- b) Members of or closely related to members of the governing bodies of the Town of Chapel Hill?
- c) Current beneficiaries of the program for which funds are being requested?
- d) Paid providers of goods or services to the program or having other financial interest in the program?

If you have answered YES to any question, **please provide a full explanation below.**  
 Per our bylaws, each local government appoints a member to sit on our Board of Directors. The Town of Chapel Hill Appointee is currently Amy Ryan.

**NON-DISCRIMINATION**

Provider agrees as part of consideration of the granting of funds by funding agencies to the parties hereto for themselves, their agents, officials, employees and servants agree not to discriminate in any manner of these basis of race, color, gender, national origin, age, handicap, religion, sexual orientation, gender identity/expression, familial status or veterans status with reference to any activities carried out by the grantee, no matter how remote.

**To the best of my knowledge and belief all of the above information is true and current. I acknowledge and understand that the existence of a potential conflict of interest does not necessarily make the program ineligible for funding, but the existence of an undisclosed conflict may result in the termination of any grant awarded.**

Signature: DocuSigned by:  
*Kimberly Sanchez*  
1BE8346B29ED45C...  
 Executive Director \_\_\_\_\_ Date 9/29/2021

<b>ORGANIZATION INFORMATION</b>
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1. **Organization Mission** (*no more than a few sentences*): To strengthen our community with permanently affordable housing opportunities.
2. **Organization Staff:** Please provide names of staff, contractors, and/or volunteers that will be involved with the project. Describe their responsibilities with the project and track record in successful completion of similar projects in the past.

**Kimberly Sanchez**, Executive Director; oversees the organization

**Lori Woolworth**, Director of Operations and Finance; acts as liaison between Self Help and CHT, oversees the Sales and Property Management functions

**Calvin Burton**, Development and Communications Manager

**Yandry Mastromihalis**, Program Coordinator; provides financial and homebuyer education to potential buyers to prepare them for homeownership

**Amy Slaughter**, Sales Specialist; works with buyers after they go under contract to help through the home buying process, including working with lenders and attorneys

**Ian Morse**, Property Manager; works with buyers to perform walkthroughs of the property and makes sure all repairs have been completed

**# of FTE – Full-Time Paid Positions:** 9

**# of FTE Part-Time (less than 40 hours/wk) Paid Positions:** 0

3. **Agency Track Record:** Briefly describe three relevant and substantially similar affordable housing development or preservation projects completed by the organization in the last 10 years (preferably 5 years). The project description should include: (SEE EXHIBIT A)
  - a. Location
  - b. Scope and scale of project
  - c. Total development budget and financing sources
  - d. Indication of whether the projects were completed on budget and on time. If not completed on budget and on time, please describe why.
  - e. Photos/illustrations of completed project

For all projects for which you have received Town funding within the last 5 years, please provide the information below.

Project Name	Project Type	Amount of Funding Approved	Is the Project Completed? (Yes/No)
Everam Court (2 units)	Property Acquisition	\$20,000	Yes
201 N Graham St	Property Acquisition	\$50,000	Yes
306 Brooks	Property Acquisition	\$55,000	Yes
230 N Graham St	Property Acquisition	\$60,000	Yes
Greenway Landing (2 units)	Property Acquisition	\$100,000	Yes
1000 Shagbark	Property Acquisition	\$20,000	Yes
Chandler Woods (5 units)	Property Acquisition	\$120,000	Yes
310 Lindsay*	Property Acquisition	\$20,000	Yes
Resale Subsidy	Homebuyer Assistance	\$30,000	No (\$15,000 remaining)
*\$10,000 of leftover subsidy from Chandler Woods project used for Lindsay with Town approval			

**\*Add rows as needed to reflect additional projects that have received Town funding within the last 5 years.**

**PROJECT INFORMATION**

**4. Project Description:** Please provide a general overview of your project, including what you are planning to produce and how you are planning to carry out the project. *(in 100 words or less)*. CHT will purchase the home from Self-Help after it is renovated. We will market the home and sell it to a buyer earning less than 80% AMI. We will sell the home using a 99-year ground lease, which keeps the home permanently affordable.



**5. Affordability Term.** Is the proposed project permanently affordable *(99 year affordability term)*?

Yes

No

If no, what is the affordability term of the proposed project?

Briefly describe any methods to ensure long-term affordability of housing units, including subsidy recapture, equity sharing, and deed restrictions. **We use a 99-year ground lease to limit appreciation and require the home be the buyer's primary residence.**

**6. Leverage:** How much funding is committed at the time of submission of this application? \$30,000  
What percentage of funding for the proposed project would be leveraged from sources other than the Town? **78%** *(Please provide documentation of how you calculated leverage as well as funding commitment letters if applicable).*

**7. Project Profile***Insert project information below*

<b>Location</b> <i>(insert address if available)</i>	<u>223 N Graham Street, Chapel Hill</u>				
<b>Size</b> <i>(insert acreage of development site)</i>					
<b>Total Number of Units</b>	<u>1</u>				
	<b># of Total Housing Units</b>	<b># of Bathrooms</b>	<b>Square Footage</b>	<b>Proposed Rent or Sale Price Per Unit</b>	<b>Projected Cost Per Unit Including Utilities</b>
<b>Studios</b>					
<b>One-bedroom</b>					
<b>Two-bedroom</b>					
<b>Three-bedroom</b>	<u>1</u>	<u>1</u>	<u>898</u>	<u>\$148,000</u>	
<b>Four-bedroom</b>					
<b>Area Median Income Served</b> <i>(insert # of units by AMI)</i>					
<b>&lt;30%</b>					
<b>31-60%</b>					
<b>61-80%</b>	<u>1</u>				
<b>81-100%</b>					
<b>&gt;100%</b>					
<b>Target Population</b> <i>(check all that apply)</i>					
<b>Families</b>	<input checked="" type="checkbox"/>				
<b>Older Adults (Age 55+)</b>	<input checked="" type="checkbox"/>				
<b>Disabled</b>	<input checked="" type="checkbox"/>				
<b>Homeless</b>	<input type="checkbox"/>				
<b>Veterans</b>	<input type="checkbox"/>				
<b>Other</b> <i>(specify)</i>	<input type="checkbox"/>				
<b>ADA Accessibility</b> <i>(insert # of total units)</i>					
<b>Total Development Cost Per Unit</b>	\$269,000				
<b>Per Unit Subsidy</b>	\$ 60,000/ unit				
<b>Town Planning Approvals Received</b> <i>(as of the date of application)</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> NA				

**8. Energy Efficiency:** Will the proposed project meet the standards and requirements of Energy Star 3.0 or standards outlined in the latest NCHFA QAP as verified by an independent, third party expert?

Yes

No

If not, please briefly describe the energy efficiency features included in the proposed project:  
The renovation project will include replacement of one door that will allow for increase weatherization.

**9. Universal Design:** Please briefly describe the universal design features included in the proposed project: None.

## 10. Social Equity

- a. Please describe how you have involved the intended beneficiaries of the proposed project in the planning and design process (*in 100 words or less*). Due to the timing of this project, a buyer will not be identified until the acquisition and rehab have been completed.
- b. How has your organization incorporated racial equity goals into your organizational goals?

Our organizational values are:

**Dedication to our mission:** We care about our homeowners, tenants, and the community we share. We seek out new and innovative opportunities and solutions to partner and serve.

**Focus on inclusion:** We want our organization to reflect our community, and we hold ourselves accountable to building a diverse and inclusive organization. We promise to act on that commitment and respect each other in the process.

**Commitment to positive culture:** We are committed to excellence in our work, and we invest in each other and our team. Our community and our workplace are safe, encouraging, equitable spaces, and we always support each other. We are open to criticism if it makes us better.

We are also in the process of writing a new strategic plan. In that plan, one approved goal is: Increase clients eligible for housing and reducing barriers, with an emphasis on reaching minorities through education and outreach.

- c. Please fill in the below questions and provide any additional context on the racial composition of the organization and board leadership:

- i. % of staff that are people of color: 44%
- ii. % of board that are people of color: 38%
- iii. % of staff that have attended racial equity training: 100%

- d. Please describe any additional activities your organization is doing to address racial equity.

CHT will concentrate on eliminating the disparities that people of color experience, especially in those areas related to CHT policies, programs and services. People of color share similar barriers with other historically marginalized groups such as people with low income, people with disabilities, LGBTQ communities, women, older adults and young people. But people of color tend to experience those barriers more deeply due to the pervasive and systemic nature of racism. By addressing the barriers experienced by people of color, we will effectively also identify solutions and remove barriers for other disadvantaged groups. CHT also hired a consultant from Build from the Heart to work with staff over a period of 3 months to engage in group discussion and reflection regarding racial equity issues. We also participated in a moderated book discussion on White Fragility.



## ATTACHMENTS

### Description of Required Attachments

#### 1. Financial Audit

- a. Please include your organization's most recent financial audit. For organizations with prior year revenues totaling \$500,000 or more a financial audit, prepared by a certified public accountant is required. Agencies with prior year revenues of less than \$500,000 may submit a completed Schedule of Receipts and Expenditures form (see application materials), in lieu of an audit/report. Agencies with a certified audit/report do not need to complete the form.

#### 2. Organization Budget

- a. Please submit an organizational budget. Among other relevant revenue and expenditure information, please include line items on any government grants or loans by jurisdiction. If your organization has run a deficit, please include that information here.

#### 3. Project Financials

- a. Please submit the following information about the project in a Microsoft Excel document or similar format, as relevant:
  - Project Budget/Development Costs
  - Sources and Uses
  - Operating pro forma (rental projects):
    - must show 20+ year cash flow projections that includes documentation of key operating assumptions, estimated rental income, operating expenses, net operating income, and any anticipated debt service, including a separate line item for any debt service (principal and/or interest) associated with Town loans requested as part of this application. Pro forma should project expenses far enough out to show when debt service ends (i.e., more than 20 years if necessary). Applicants may use the attached template or a similar version of their own.
    - Rental Income Breakdown: must show rent and utilities by bedroom size and AMI level, using the attached template or something similar.
  - Housing Affordability and Sale Proceeds (homeownership projects): must show sales price by bedroom size and AMI level, using the attached template or something similar.

#### 4. Articles of Incorporation

#### 5. List of Board of Directors

- a. Provide the following information about each board of director's member: name, occupation or affiliation of each member, officer positions, race/ethnicity.

#### 6. Project Information

- a. For all projects, please submit a detailed timeline showing when each work task will be completed over the duration of the project.
- b. For development and renovation projects, please submit the following:
  - Site map showing lot boundaries, locations of structure(s), and other site features
  - General location map (at least ½ mile radius)
  - Floor plan(s)

- Elevation(s)
- Property Appraisal
- Evidence of zoning compliance
- Map showing proximity to bus stops, grocery store, schools and other amenities (including distance in miles from project site and amenities)

### **Non-Profit Corporations:**

#### **1. IRS Federal Form 990**

A copy of the organization's most recent Form 990 is required for nonprofit applicants. The specific form depends upon the organization's financial activity. Review the IRS' table guide, for more details. For Form 990-N (e-postcard) filers, include a copy of the postcard, with the organization's application materials.

#### **2. NC Solicitation License**

A copy of the organization's current solicitation license is required. Organizations that solicit contributions in North Carolina, directly or through a third party, must renew their licenses annually. For more details, refer to the NC Secretary of State's licensing website and its Frequently Asked Questions Guide (PDF), about exemptions. If exempt per N.C.G.S. § 131F-3, include a copy of the exemption letter with the organization's application materials.

#### **3. IRS Federal Tax-Exemption Letter**

A copy of the organization's current IRS tax-exempt letter that confirms its nonprofit status is required. An organization can request a copy of its letter from the IRS' Customer Account Services.

### **For-Profit Corporations:**

#### **1. Tax Returns**

- a. Most recent two years of corporate tax returns.

#### **2. YTD Profit and Loss Statement and Balance Sheet**

#### **3. Tax Returns**

- a. Most recent two years personal tax returns and financial statements for all persons who have more than 19.9% ownership interest in the organization

#### **4. References**

- a. Two business references with name, address, and telephone number

#### **5. Signed "Authorization to Release Information" for each person who has more than 19.9% ownership interest in the organization**

#### **6. Completed W-9 Form**



## OVERVIEW OF AFFORDABLE HOUSING FUNDING SOURCES

**Purpose:** This document is intended to provide a summary of the Town's affordable housing funding sources available to assist in creating a vibrant and inclusive community. The Overview includes a brief description of each funding source, as well as the eligible uses of each source.

### TOWN FUNDING AVAILABLE FOR AFFORDABLE HOUSING PROJECTS FISCAL YEAR 2021-22:

SOURCE	AMOUNT
Affordable Housing Bond	\$5,000,000*
Affordable Housing Fund <i>(funding available varies based on receipt of payments in lieu from developers of affordable housing projects)</i>	\$450,000
Affordable Housing Development Reserve	\$688,395
Community Development Block Grant (CDBG)** <i>(Federal Funding - amount is approximate and varies year-to-year, based on Federal Budget)</i>	\$275,000
HOME** <i>(Federal Funding Process lead by Orange County – amount is approximate and varies year-to-year, based on federal budget)</i>	\$375,000
<b>TOTAL</b>	<b>\$1,695,000</b>

\*The next round of Bond funding is anticipated to be in FY2022

\*\*CDBG and HOME use a separate funding application. See below for additional information.

### AFFORDABLE HOUSING BOND:

On November 6, 2018, voters approved the Affordable Housing Bond Referendum. Voter approval of the Bond gives the Town Council authority to issue up to \$10 Million in bonds to support affordable housing projects in the community.

#### Eligible Uses:

1. Land Acquisition
2. Home Repairs and Comprehensive Rehabilitation
3. Construction of New Affordable Housing Units

#### Threshold requirements:

1. The applicant can demonstrate site control (if applicable).
2. The project is located within the Town of Chapel Hill city limits or ETJ.
3. The project falls within one of the eligible uses for Bond funding approved by the Town.
4. The application is complete and submitted by the established deadlines.

5. The proposed project includes at least 10 homes/units.
6. The proposed project must draw funding awarded within three years of the approval of funding award by the Town.

**Application Process:** The Town will periodically announce a request for proposals for Bond funds via the Town's website and other communications channels. Applications are reviewed and evaluated by the Housing Advisory Board (HAB) and then presented to the Town Council for final approval.

For more information on Affordable Housing Bond funds, visit the Town's [Affordable Housing Website](#).

### **AFFORDABLE HOUSING FUND (AHF):**

In 2002, the Town Council established the AHF to preserve owner-occupied housing in Chapel Hill for affordable housing purposes.

**Application Process:** Funds are available through the AHF on a rolling basis, with applications being accepted at any time. Applicants are evaluated by the Town Manager, with Council approval required for requests for housing renovation or homeownership assistance above \$40,000.

**Eligible Uses:** The AHF has a variety of eligible uses, including:

1. Preservation of owner-occupied housing
2. Land acquisition
3. Renovation
4. Affordable housing construction
5. Rental and utility assistance

For more information on the Affordable Housing Fund, visit the [Town's website](#).

### **AFFORDABLE HOUSING DEVELOPMENT RESERVE (AHDR):**

In fiscal year 2014-15, the Town Council allocated over \$688,000 for affordable housing and approved an allocation strategy for this funding, establishing an Affordable Housing Development Reserve (AHDR).

**Eligible Uses:** The AHDR is dedicated exclusively to the development and preservation of affordable housing. Priority project areas are:

1. Land bank and land acquisition
2. Rental subsidy and development
3. Homeownership development and assistance
4. Future development planning.

**Threshold requirements:**

1. The applicant can demonstrate site control (if applicable).
2. The project is located within the Town of Chapel Hill city limits or ETJ.
3. The project falls within one of the priority project areas identified by the Town.
4. The application is complete and submitted by the established deadlines.

**Application Process:** AHDR applications are accepted three times per year (~ every 4 months). Applications are reviewed and evaluated by the Housing Advisory Board (HAB) and then presented to the Town Council for final approval.

For more information on the Affordable Housing Development Reserve, visit the [Town's website](#).

## **Federal Funding Sources Not Covered By This Application**

### **COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM (CDBG)**

The CDBG Program was created by the U.S. Congress in 1974 and is administered by the Department of Housing and Urban Development (HUD). The primary objective of the program is to develop viable urban communities by providing decent housing and a suitable living environment and expanding economic opportunities for low- and moderate-income peoples.

**Eligible Uses:** CDBG eligible activities include, but are not limited to: Acquisition of Real Property, Relocation and Demolition, Rehabilitation, Public Facilities and Improvements, and Public Services. Ineligible activities include Political Activities, Certain Income Payments, Construction of New Housing, or buildings for the General Conduct of Government.

**Application Process:** Applications are accepted once a year and reviewed by an Application Review Committee, which makes a recommendation for funding to the Chapel Hill Town Council for final approval.

For more information about the CDBG program, visit the [Federal CDBG website](#) and the [Town website](#).

### **THE HOME INVESTMENT PARTNERSHIP PROGRAM (HOME)**

In 1990, Congress enacted the HOME Investment Partnerships Act in an effort to provide a new approach to housing assistance at the federal level. This federal housing block grant affords state and local governments the flexibility to fund a wide range of housing activities.

**Eligible Uses:**

1. Projects that expand the supply of decent, safe, sanitary and affordable housing, with emphasis on rental housing, for very low- and low-income citizens
2. Projects that strengthen the abilities of state and local governments to design and implement strategies for achieving adequate supplies of decent affordable housing
3. Projects that encourage public, private and nonprofit partnerships in addressing housing needs.

**Application Process:** Applications are accepted once a year and reviewed by a committee coordinated by Orange County.

For more information about the HOME program, visit the [Federal HOME website](#) and the [Town website](#).

### OVERVIEW OF ELIGIBLE USES BY FUNDING SOURCE

Uses	CDBG	HOME	AHF	AHDR	BOND
Acquisition	✓	✓	✓	✓	✓
New Construction		✓	✓	✓	✓
Demolition	✓			✓	✓
Future Development Planning				✓	
Homebuyer/Second Mortgage Assistance	✓	✓	✓	✓	
Land Banking				✓	
Redevelopment/ Reconstruction	✓	✓	✓	✓	✓
Rehabilitation/Renovation	✓	✓	✓	✓	✓
Housing Relocation	✓	✓		✓	
Rental Assistance	✓	✓	✓	✓	✓
Rental Subsidy			✓	✓	
Site Improvements	✓	✓	✓	✓	✓

# 2021 INCOME LIMITS

## US Department of Housing and Urban Development (HUD)

Durham-Chapel Hill Metropolitan Statistical Area  
(Durham, Orange, and Chatham Counties)

<i>Income Level</i>	<b>1 person</b>	<b>2 people</b>	<b>3 people</b>	<b>4 people</b>	<b>5 people</b>	<b>6 people</b>	<b>7 people</b>	<b>8 people</b>
<b>30% area median income</b>	\$18,150	\$20,750	\$23,350	\$25,900	\$28,000	\$30,050	\$32,150	\$34,200
<b>50% area median income</b>	\$30,250	\$34,600	\$38,900	\$43,200	\$46,700	\$50,150	\$53,600	\$57,050
<b>80% area median income</b>	\$48,400	\$55,300	\$62,200	\$69,100	\$74,650	\$80,200	\$85,700	\$91,250

Source: U.S. Department of Housing and Urban Development (HUD) 2021

Community Home Trust  
AHDR Application, September 28, 2021  
223 N. Graham St

**EXHIBIT A**

Project #1: 306 Brooks, Chapel Hill, NC 27516



TOCH Grant Award: \$75,000

**Total Budget:**

Acquisition Costs:	\$227,000
Rehab and Closing Costs:	\$58,000
<b>Total Costs:</b>	<b>\$285,000</b>

**Sources:**

Town of Chapel Hill (AHDR):	\$55,000
Town of Chapel Hill (CDBG):	\$20,000
Orange County:	\$50,000
CHT Contribution:	\$12,000
Buyer's 1 <sup>st</sup> Mortgage:	\$148,000
<b>Total Funding Sources</b>	<b>\$285,000</b>

Acquisition Date: 4/30/2018

Sale Date to Buyer : 11/15/2018

Scope: Purchased home from Self-Help. CHT managed the renovations. Once completed we sold the home to a buyer earning less than 80% AMI.



Project #2: 310 Lindsay, Chapel Hill, NC 27516



TOCH Grant Award: \$30,000

**Total Budget:**

Acquisition Costs:	\$170,000
Closing Costs:	\$5,000
<b>Total Costs:</b>	<b>\$175,000</b>

**Sources:**

Town of Chapel Hill (CDBG):	\$30,000
NCHFA CPLP Loan to Buyer:	\$18,000
Buyer's 1 <sup>st</sup> Mortgage:	\$127,000
<b>Total Funding Sources</b>	<b>\$175,000</b>

Acquisition Date: 3/4/2020

Sale Date to Buyer: 3/4/2020

Scope: Purchased fully-renovated home from Self-Help. CHT marketed and sold the home to a buyer earning less than 80% AMI.

Project #3: 230 N Graham, Chapel Hill, NC 27516



TOCH Grant Award: \$30,000

**Total Budget:**

Acquisition Costs:	\$257,000
Closing Costs:	\$3,000
<b>Total Costs:</b>	<b>\$260,000</b>

**Sources:**

Town of Chapel Hill (AHDR):	\$60,000
Buyer's 1 <sup>st</sup> Mortgage:	\$200,000
<b>Total Funding Sources</b>	<b>\$260,000</b>

Acquisition Date: 11/5/20

Sale Date to Buyer: 11/5/20

Scope: CHT purchased a full-renovated home from Self-Help. We marketed the home and sold it to a buyer earning less than 100% AMI. This project was significantly delayed due to a temporary rental needed by Self-Help to complete another project. There were also contractor issues which delayed the renovation. The delay meant the home was not available to CHT to sell, during the timeline expected.



## Community Home Trust (Organization)

### 2021-22 Budget; Final

*Created January 11, 2021; Updated June 4th, 2021*

<i>In \$ 000's</i>	2021-22
<b>Support and Revenue</b>	<b>Final Budget</b>
Orange County Support	212
Town of Chapel Hill Support	358
Carrboro Support	71
Hillsborough Support	3
Fundraising	132
PPP Forgiveness	137
Fee Income (Home Sales)	75
Master Leasing	115
Other Income	109
<b>TOTAL SUPPORT AND REVENUE</b>	<b>1,211</b>
<b>Operating Expenses</b>	
Personnel	764
Operating Expenses	238
Master Leasing	115
Asset Management	45
<b>TOTAL OPERATING EXPENSES</b>	<b>1,162</b>
<b>NET OPERATING INCOME/LOSS</b>	<b>49</b>

## Community Home Trust (Project)

*223 N. Graham St*

Purchase Price	191,000
Rehab Costs	74,000
Selling Costs	4,000
<b>Total Costs</b>	<b>269,000</b>

**Funding Sources:**

Oak Foundation	30,000
NCHFA CPLP Loan to Buyer	30,000
Buyers 1st Mortgage	149,000
TOCH AHDR Funds	60,000
<b>Total Funding Sources</b>	<b>269,000</b>



# NORTH CAROLINA

## Department of The Secretary of State

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**To all whom these presents shall come, Greetings:**

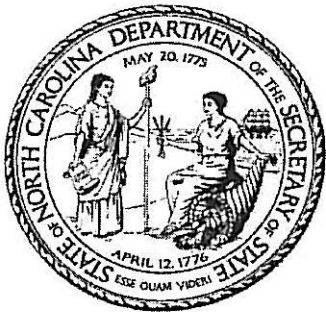
**I, ELAINE F. MARSHALL**, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

### ARTICLES OF AMENDMENT

OF

### ORANGE COMMUNITY HOUSING AND LAND TRUST WHICH CHANGED ITS NAME TO COMMUNITY HOME TRUST

the original of which was filed in this office on the 20th day of May, 2009.



IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 20th day of May, 2009

*Elaine F. Marshall*  
Secretary of State

State of North Carolina  
Department of the Secretary of State

SOSID: 0494037  
Date Filed: 5/20/2009 3:14:00 PM  
Effective: 7/1/2009  
Elaine F. Marshall  
North Carolina Secretary of State  
C200913200744

ARTICLES OF AMENDMENT  
NONPROFIT CORPORATION

Pursuant to §55A-10-05 of the General Statutes of North Carolina, the undersigned corporation hereby submits the following Articles of Amendment for the purpose of amending its Articles of Incorporation.

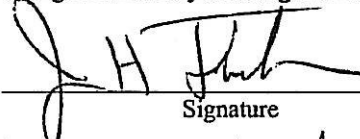
1. The name of the corporation is: Orange Community Housing and Land Trust
2. The text of each amendment adopted is as follows (*state below or attach*):

Article One is amended to read as follows: The name of the corporation is Community Home Trust

3. The date of adoption of each amendment was as follows: April 15, 2009
4. (*Check a, b, and/or c, as applicable*)
  - a.  The amendment(s) was (were) approved by a sufficient vote of the board of directors or incorporators, and member approval was not required because (*set forth a brief explanation of why member approval was not required*) the corporation has no members entitled to vote on amendments to the Articles of Incorporation.
  - b.  The amendment(s) was (were) approved by the members as required by Chapter 55A.
  - c.  Approval of the amendment(s) by some person or persons other than the members, the board, or the incorporators was required pursuant to N.C.G.S. §55A-10-30, and such approval was obtained.
5. These articles will be effective upon filing, unless a date and/or time is specified: July 1, 2009

This the 24<sup>th</sup> day of April, 2009

Orange Community Housing and Land Trust

  
\_\_\_\_\_  
Signature

James H Tucker, BOARD PRESIDENT  
Type or Print Name and Title



July 9, 2001

**Board of Directors**

*Keith D. Cook*  
Chairman

*Wayne Kuncel*  
Vice-Chairman

*Josh Gurlitz*  
Secretary

*Robin Lackey Jacobs*  
Treasurer

*Marion Brooks*

*Jim Earnhardt*

*Jim Gillan*

*Wendy Farrington*

*Joe Herzenberg*

*Rachael Murphey*

*Garry Sronce*

*John Tyrrell*

*Bob Ward*

**Executive Director**

*Robert Dowling*

Internal Revenue Service  
TE/GE  
PO Box 2508  
Room # 4010  
550 Main Street  
Cincinnati, OH 45201

To Whom It May Concern:

Please find enclosed a copy of Articles of Merger for Orange Community Housing Corporation into Community Land Trust in Orange County. The resulting organization is officially named Orange Community Housing and Land Trust. As you can see, the North Carolina Secretary of State has approved this merger of these two, local non-profit organizations.

Please accept this letter as our formal notification of the merger, and to request your acceptance of the name change. The surviving entity, Orange Community Housing and Land Trust (OCHLT) will assume the tax ID number of the Community Land Trust in Orange County (56-2141179). Our address will remain the same.

The tax ID number for Orange Community Housing Corporation is 58-1921089. If you need additional information, please contact me at 919-967-1545. Thank you for your attention to this matter.

Sincerely,

Robert Dowling  
Executive Director

Return to: Robert Dowling, OCHLT, PO Box 307 Carrboro 27510

BOOK 2416 PAGE 566



# NORTH CAROLINA

## Department of The Secretary of State

*Original*

To all whom these presents shall come, Greetings:

I, ELAINE F. MARSHALL, Secretary of State of the State of North Carolina, do hereby certify the following and hereto attached to be a true copy of

### ARTICLES OF MERGER

OF

ORANGE COMMUNITY HOUSING CORPORATION

INTO

COMMUNITY LAND TRUST IN ORANGE COUNTY  
WHICH CHANGES ITS NAME TO:  
ORANGE COMMUNITY HOUSING AND LAND TRUST

the original of which was filed in this office on the 29th day of June, 2001.



IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 29th day of June, 2001

*Elaine F. Marshall*

Secretary of State

SOSID: 0494037  
Date Filed: 6/29/2001 3:06 PM  
Effective: 7/1/2001  
Elaine F. Marshall  
North Carolina Secretary of State

21 170 5040

ARTICLES OF MERGER  
OF  
ORANGE COMMUNITY HOUSING CORPORA'  
INTO

COMMUNITY LAND TRUST IN ORANGE COUNTY

Pursuant to § 55A-11-01 and 55A-11-04 of the General Statutes of North Carolina, the undersigned corporation, as the surviving corporation in a merger, hereby submits the following Articles of Merger:

1. The name of the surviving corporation is Community Land Trust in Orange County a corporation organized under the laws of North Carolina; the name of the merged corporation is Orange Community Housing Corporation, a corporation organized under the laws of North Carolina.
2. Attached is a copy of the Plan of Merger that was adopted in the manner prescribed by law for each of the corporations participating in the merger.
3. With respect to the surviving corporation, member approval was required for the merger, and the plan of merger was approved by the members as required by Chapter 55A of the North Carolina General Statutes.
4. With respect to the merged corporation, member approval was not required for the merger, and the plan of merger was approved by a sufficient vote of the board of directors.
5. These articles will be effective at 12:01 o'clock a.m. on July 1, 2001

COMMUNITY LAND TRUST IN ORANGE COUNTY \_\_\_\_\_<sup>y</sup>

*Alison Weiner*

Signature

*Alison Weiner*

Name and Title

*President*



Plan of Merger

- (a) *Constituent Corporations.* Orange Community Housing Corporation ("Merging Corporation") will merge into Community Land Trust in Orange County which will be the surviving corporation ("Surviving Corporation")
- (b) *Name of Surviving Corporation.* After merger, the Surviving Corporation will have the name "Orange Community Housing and Land Trust."
- (c) *Terms and Conditions of Merger.* The merged corporation will merge into the surviving corporation. When the merger becomes effective, the corporate existence of the merged corporation will cease, and the corporate existence of the surviving corporation will continue.
- (d) *Members.* The surviving corporation will have members.
- (e) *Amendments to Articles of Incorporation.* The articles of incorporation of the surviving corporation are hereby amended as follows:

1. Article One is amended to read as follows:

ARTICLE ONE

The name of the corporation is Orange Community Housing and Land Trust.

2. Article Nine, Sections 3 through 6 and Articles Ten through Twelve are deleted.
3. New Articles Ten and Eleven are inserted to read as follows:

ARTICLE TEN

To the fullest extent permitted by the North Carolina Non-Profit Corporation Act as it exists or may hereafter be amended, no person who is serving or who has served as a director of the corporation shall be personally liable for monetary damages for breach of any duty as a director. No amendment or repeal of this article nor the adoption of any other amendment to these articles of incorporation inconsistent with this article, shall eliminate or reduce the

protection granted herein with respect to any matter that occurred prior to such amendment, repeal or adoption.

ARTICLE ELEVEN

These Articles will be effective at 12:01 o'clock a.m. on July 1, 2001.

FILED  
09 NOV 2001, at 11:40:37am  
Book 2416, Page 566 - 569  
Joyce H. Pearson  
Register of Deeds,  
Orange County, N. C.



# NORTH CAROLINA

## Department of the Secretary of State

### CERTIFICATE OF EXISTENCE

I, Elaine F. Marshall, Secretary of State of the State of North Carolina, do hereby certify that

### COMMUNITY HOME TRUST

is a corporation duly incorporated under the laws of the State of North Carolina, having been incorporated on the 11th day of May, 1999 , with its period of duration being Perpetual.

I FURTHER certify that the said corporation's articles of incorporation are not suspended for failure to comply with the Revenue Act of the State of North Carolina; that the said corporation is not administratively dissolved for failure to comply with the provisions of the North Carolina Nonprofit Corporation Act; and that the said corporation has not filed articles of dissolution as of the date of this certificate.



Scan to verify online.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this 12th day of August, 2014.

*Elaine F. Marshall*

Secretary of State

**Community Home Trust Board of Directors**

November 2021

updated 8/20/21

<u>Title</u>	<u>First</u>	<u>Last</u>	<u>Address</u>	<u>City</u>	<u>State</u>	<u>Zip</u>	<u>Phone</u>	<u>E-mail</u>	<u>Term Ends</u>	<u>Affiliation</u>	<u>Term</u>
President	Kelley	Gregory	204 Lexes Trail	Chapel Hill	NC	27516	(919) 929-2089	kgbutterflykg@gmail.com	Oct. 2021	Homeowner Board member	second
Vice President	Ava	Miles	140-206 W Barbee Chapel Rd	Chapel Hill	NC	27517	(919) 518-5851	a4hollywood@hotmail.com	Oct. 2023	Homeowner board member	second
Treasurer	Bruce	Warrington	103 Little Branch Trail	Chapel Hill	NC	27517	(919) 843-5252	bruce.warrington@unc.edu	Oct. 2022	UNC appointee	first
Secretary	George	Barrett	223 N. Roberson St.	Chapel Hill	NC	27516	(704) 891-6520	george@jacksoncenter.info	Oct. 2022	Community member	second
Board Member	Barbara	Foushee	100 Williams Street	Carrboro	NC	27510	(919)270-4087	bmfoushee@townofcarrboro.org	Dec. 2022	Appointed by Town of Carrboro	first
Board Member	Mark	Bell	168 West King Street	Hillsborough	NC	27278	(919) 883-5187	mark.bell@hillsboroughnc.gov	Dec. 2022	Appointed by Town of Hillsborough	first
Board Member	Amy	Ryan	209 Adams Way	Chapel Hill	NC	27516	(919) 590-5772	aryan@townofchapelhill.org	Dec. 2022	Appointed by Town of Chapel Hill	first
Board Member	Earl	McKee		Chapel Hill	NC	27517		emckee@orangecountync.gov	Dec. 2023	Appointed by Orange County	first
Board Member											
Board Member	Brian	Reid	140-315 W Franklin St	Chapel Hill	NC	27517	(336) 684-3082	brian.a.reid@hotmail.com	Oct. 2023	Homeowner board member	first
Board Member	Sergio	Escobar	104 Bella Drive	Chapel Hill	NC	27517	(919) 260-3546	seresfer@hotmail.com	Oct. 2021	Homeowner board member	first
Board Member	Jennifer	De La Rosa	139 Viburnum Way	Carrboro	NC	27510	(919) 951-5158	jennracquel@gmail.com	Oct. 2023	Homeowner board member	first
Board Member	Ken	Reiter	303 Rock Garden Road	Chapel Hill	NC	27516	(919) 259-2088	kreiter@belmontsayre.com	Oct. 2021	Community member	second
Board member	Brika	Eklund		Hillsborough	NC		(919) 956-4632	brika eklund@self-help.org	Oct. 2023	Community member	first
Board member	VACANT										
Board member	Cindy	Covington		Hillsborough	NC		(252) 813 4903	cindyharco@aol.com	Oct. 2023	Community member	first



September 28, 2021

Lori Woolworth  
 Director of Operations & Finance  
 Community Home Trust  
 105 Conner Drive, Suite 1000  
 Chapel Hill, NC 27514

Dear Ms. Woolworth:

On behalf of the Center for Community Self-Help (and/or its affiliates, “Self-Help”), it is my pleasure to inform you that Community Home Trust is a Qualified Developer for the purpose of participating in the Northside Neighborhood Initiative, subject to the conditions described in this letter. As a result of your participation as a Qualified Developer, you are eligible to purchase one or more properties from Self-Help’s Northside Land Bank. Furthermore, Self-Help has reviewed and approved your request for financial support in the form of a write-down of the sales price, which is made possible by the generous support of the Oak Foundation through a grant to Self-Help.

The specifics of this offer include:

“Property” means the following one or more properties located in Chapel Hill, NC:	223 N Graham Street
Estimated Sales Price Before Write-Down(s):	\$262,275
Write-Down(s) Committed:	\$30,000
Date Purchase(s) Must Occur By:	October 1, 2022

This offer is conditioned upon:

- (1) the execution of a Purchase Agreement upon terms and conditions acceptable to Self-Help and Qualified Developer, with any conditions not specifically referenced in this letter to be mutually agreed upon by the parties;
- (2) the receipt by Qualified Developer of additional funding from the Town of Chapel Hill in an amount providing at least a 1:1 match to the Write-Down(s) above; and
- (3) the attachment of deed restrictions ensuring that the Property will be owner-occupied by persons with incomes at or below 115% of the Area Median Income for the area including Chapel Hill, North Carolina, for a period of at least 20 years.

By acknowledging receipt of this letter, you agree to develop the Property in accordance with the Program guidelines and in furtherance of charitable purposes. Please do not hesitate to contact me with any questions you may have. My direct line is (919) 956-4614. To accept this offer, please sign one copy of this letter and send it back to me via email at [graham.smokoski@self-help.org](mailto:graham.smokoski@self-help.org) by October 1, 2021.

We look forward to seeing the work you do with the Property.

Sincerely,



Graham Smokoski  
Project Manager

Accepted and Agreed by:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



## PRELIMINARY BUDGET

**OWNER** SELF HELP CREDIT  
UNION  
301 W. MAIN ST.  
DURHAM, NC

**PROJECT** 223 N Graham St.  
CHAPEL HILL NC

**DATE** 9/8/21

CATEGORY	DESCRIPTION - includes general notes	ESTIMATE	CATEGORY SUBTOTAL
<b>GENERAL REQUIREMENTS</b>			\$ 7,050.00
Plans and Permits			
Survey			
Architect/Engineer Fee			
Temporary Utilities	Portable toilets	750	
Final Clean		600	
Demolition - Interior	includes demo bathroom, flooring, misc. wall removal	2500	
Demolition - Site	demo exterior ramp; deck	1700	
Dumpster & Removal	Dumpster and Hauling Fees	1500	
Asbestos Abatement	none included unless requested		
Lead Remediation	none included unless requested		
<b>ON-SITE WATER/SEWER</b>			\$ -
<b>UTILITIES</b>			\$ -
<b>SITE WORK</b>			\$ 1,500.00
Fencing			
Grading			
Landscaping			
Hardscapes			
Retaining Walls			
Trenching			
Other	install #57 stone on driveway	\$ 1,500.00	
<b>FOUNDATION</b>			\$ -
Crawlspace			
Footings - Continuous & Piers			
Foundation Walls			
Slabs - reinforced			
Other			
<b>ROUGH CARPENTRY</b>			\$ 8,000.00
Decks, Railings, Stairs	Frame new 12x12 deck at rear	\$ 5,500.00	

Framing, Sheathing, Tyvek		
Porches		
Stairs - interior		
Structural Members	Structural repairs to bathroom floor	\$ 2,500.00
<b>FINISH CARPENTRY</b>		<b>\$ 750.00</b>
Custom Work		
Trim - interior	new trim in bathroom (base, shoe moulding)	\$ 750.00
Trim - exterior		
Stock trim		
Other		
<b>ROOFING</b>		<b>\$ 6,500.00</b>
Shingles	replace roof with new laminate shingles	\$ 6,500.00
Flashing		
Gutters & Downspouts		
Single Membrane Roof		
Other		
<b>WINDOWS/DOORS</b>		<b>\$ 3,250.00</b>
Doors - Interior		
Doors - Interior Hardware	Replace existing door hardware with conversion kit	\$ 950.00
Doors - Exterior	Replace exterior doors hardware kit	\$ 800.00
Doors - Exterior Hardware	Replace 5' slider in rear of house - change direction	\$ 1,500.00
Misc. Doors		
Windows		
Skylights		
<b>THERMAL &amp; MOISTURE</b>		<b>\$ -</b>
Air Barrier		
Insulation - Floor		
Insulation - Walls		
Insulation - Ceiling		
Vents - soffit/gable		
Other		
<b>FINISHES</b>		<b>\$ 22,900.00</b>
Drywall	Patch all drywall in house, repair around tub in bathroom	\$ 1,600.00
Flooring - Carpet		
Flooring - Ceramic w/ cement underlayment		
Flooring - Laminate	Install new LVP in back bedroom and hall	\$ 3,000.00
Flooring - Sheet Vinyl w/ underlayment	Install new sheet vinyl in bathroom	\$ 900.00
Flooring - Wood		
Painting - interior	Paint all walls, ceilings, trim, doors, Patch interior doors	\$ 8,000.00
Painting - exterior	Paint all siding, trim, soffit, fascia, etc.	\$ 6,000.00
Siding	Remove AC units, frame and install sheathing and siding	\$ 1,600.00
Walls - ceramic tile w/ cement underlayment	Install new ceramic tile around tub	\$ 1,800.00



Other			
<b>BATH</b>			<b>\$ 1,400.00</b>
Accessories	Provide and install bath accessories: mirror, tp holder, rod	\$ 600.00	
Cabinets/Counters	Provide and install vanity with countertop	\$ 800.00	
Other			
<b>KITCHEN</b>			<b>\$ -</b>
Accessories			
Appliances			
Cabinets/Counters			
Other			
<b>PLUMBING</b>			<b>\$ 6,000.00</b>
Subcontractor	Relocate washer connections; tub, toilet and vanity	\$ 4,500.00	
Fixture Allowance	Tub, toilet, tub faucet, vanity faucet	\$ 1,500.00	
<b>ELECTRICAL</b>			<b>\$ 3,700.00</b>
Subcontractor	Replace all fixtures in house	\$ 2,300.00	
Fixture Allowance	New fixtures throughout rooms	\$ 1,400.00	
<b>HVAC</b>			<b>\$ -</b>
Subcontractor			
<b>OTHER</b>			<b>\$ -</b>
Other			
<b>TOTALS</b>			<b>\$ 61,050.00</b>
Contingency		20%	<b>\$ 12,210.00</b>
<b>Total Final Budget</b>			<b>\$ 73,260.00</b>

# State of North Carolina

## DEPARTMENT OF THE SECRETARY OF STATE

### Charitable Solicitation License

This document certifies that, in accordance with the provisions of Chapter 131F of the General Statutes of North Carolina,

#### **Community Home Trust**

North Carolina Solicitation License Number: SL003262

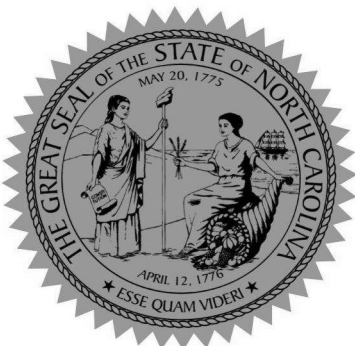
Federal Tax Exempt Status: 501(c)(3) Charitable Organization

with headquarters in Chapel Hill, NC is hereby duly licensed by the Department of the Secretary of State to solicit charitable contributions in North Carolina for the purposes set forth in the application for license approved by and filed with the Department of the Secretary of State. This license is not transferable and shall continue in full force and effect from the 30th day of December, 2020 to the 15th day of November, 2021, unless revoked for cause.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal at the City of Raleigh, this the 27th day of January, 2021.

*Elaine F. Marshall*

**ELAINE F. MARSHALL**  
SECRETARY OF STATE



Document Id: L202036500047



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508, Room 4010  
Cincinnati OH 45201

In reply refer to: 4077550279  
July 06, 2009 LTR 4168C 0  
56-2141179 000000 00 000  
00030040  
BODC: TE

COMMUNITY HOME TRUST  
104 JONES FERRY RD STE C  
CARRBORO NC 27510-2036



027531

Employer Identification Number: 56-2141179  
Person to Contact: Sophia Brown  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of June 12, 2009, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in January 2000, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Cindy Westcott  
Manager, ED Determinations