

Affordable Housing Fund (AHF) Application

This application form should be used for projects seeking City of Madison AHF funds. Applications must be submitted electronically to the City of Madison Community Development Division by **noon on July 15, 2020**.

Email to: cddapplications@cityofmadison.com

APPLICANT INFORMATION

Proposal Title:	<u>AgeBetter Community Living</u>		
Amount of Funds Requested:	<u>\$1,208,220</u>	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Name of Applicant:	<u>Gorman & Company, LLC</u>		
Mailing Address:	<u>200 N. Main St. Oregon WI, 53575</u>		
Telephone:	<u>608-835-3900</u>	Fax:	<u>608-835-3922</u>
Admin Contact:	<u>Luis Herrera</u>	Email Address:	<u>lherrera@gormanusa.com</u>
Project Contact:	<u>Ted Matkom</u>	Email Address:	<u>tmatkom@gormanusa.com</u>
Financial Contact:	<u>Duane Buscher</u>	Email Address:	<u>dbuscher@gormanusa.com</u>
Website:	<u>www.gormanusa.com</u>		
Legal Status:	<input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Non-profit	Type of LIHTC Application:	<input type="checkbox"/> 4% <input checked="" type="checkbox"/> 9%
Anticipated WHEDA Set-Aside:	<input checked="" type="checkbox"/> General <input type="checkbox"/> Preservation	<input type="checkbox"/> Non-Profit	<input type="checkbox"/> Supportive Housing
Federal EIN:	<u>82-3739186</u>	DUNS #:	<u>081077405</u>

AFFIRMATIVE ACTION

If funded, applicant hereby agrees to comply with the City of Madison Ordinance 39.02 and file either an exemption or an affirmative action plan with the Department of Civil Rights. A Model Affirmative Action Plan and instructions are available at <http://www.cityofmadison.com/dcr/aaFormsID.cfm>.

LOBBYING RESIGTRATION

Notice regarding lobbying ordinance: If you are seeking approval of a development that has over 40,000 gross square feet of non-residential space, or a residential development of over 10 dwelling units, or if you are seeking assistance from the City with a value of over \$10,000 (this includes grants, loans, TIF, or similar assistance), then you likely are subject to Madison's lobbying ordinance, sec. 2.40, MGO. You are required to register and report your lobbying. Please consult the City Clerk for more information. Failure to comply with the lobbying ordinance may result in fines of \$1,000 to \$5,000. You may register at <https://www.cityofmadison.com/clerk/lobbyists/lobbyist-registration>.

CITY OF MADISON CONTRACTS

If funded, applicant agrees to comply with all applicable local, state and federal provisions. A sample contract that includes standard provisions may be obtained by contacting the Community Development Division at (608) 266-6520.

If funded, the City of Madison reserves the right to negotiate the final terms of a contract with the selected agency.

SIGNATURE OF APPLICANT

Enter Name: Edward (Ted) Matkom

By submitting this application, I affirm that the statements and representations are true to the best of my knowledge.

By entering your initials in this box EM you are electronically signing your name as the submitter of the application and agree to the terms listed above.

Date: 7-15-2020

PROPOSAL DESCRIPTION

1. Please provide an overview of the proposal. Describe the impact of the proposed development on the community as well as other key characteristics.

AgeBetter Community Living is a proposed new construction affordable housing development targeted to seniors age 62+, specifically seniors with disabilities and in need of stable affordable housing. The project is a partnership between Gorman & Company and AgeBetter, Inc., a local nonprofit whose members are two organizations dedicated to senior housing - Attic Angel Association and Oakwood Village. AgeBetter will provide supportive services, coordination, and referrals for the development. The proposed development will be 75 units with underground parking and it will be located on the Oakwood Village Campus.

2. Please describe the following aspects of the proposed development:

Type of Project:	<input checked="checked" type="checkbox"/> New Construction	<input type="checkbox"/> Acquisition/Rehab
Type of Project:	<input type="checkbox"/> Multi-family	<input checked="checked" type="checkbox"/> Senior (55+ or 62+ yr. old): <u>62+</u>

Total number of units: 75
 Total number affordable of units (<60% CMI): 63 Total % affordable of units (<60% CMI): 84%
 Total amount of AHF requested per affordable unit: 19,178
 Number of units supported by Section 8 project-based vouchers, if known: 0 PBV CMI level: N/A

AFFORDABLE HOUSING INITIATIVE FUND GOALS & OBJECTIVES

3. Please check which of the following goals outlined in the Request for Proposals are met with this proposal:
 - 1. Increase the supply of safe, quality, affordable rental housing throughout the City that ensures long-term affordability and sustainability.
 - 2. Preserve existing income- and rent-restricted rental housing to ensure long-term affordability and sustainability.
 - 3. Improve the existing rental housing stock in targeted neighborhoods through acquisition/rehab to create long-term affordability and sustainability.

AFFORDABLE HOUSING NEEDS

4. Describe your knowledge of and experience in identifying affordable housing needs of the City of Madison.

Gorman & Company has extensive knowledge of Madison neighborhoods and the demand for affordable housing, which has only increased in recent years. Gorman has been developing affordable tax credit housing in Wisconsin since 1984. We developed, own, and manage multiple properties in Madison and the surrounding area, including Carbon at Union Corners (90-unit LIHTC development completed in fall 2017), Union Corners Grandfamily (60 LIHTC units), and Valor on Washington (59 LIHTC units). In total, Gorman has developed 15 properties in Madison. We are experienced in the entitlement process with the City and value the participation of the neighborhood. After being selected as developer for Union Corners, we conducted numerous meetings as part of the master planning process as well as additional community outreach for Carbon. We have also participated in several neighborhood meetings and steering committee meetings with the Tenney Lapham Neighborhood Association (TLNA) for Gorman's Valor on Washington project.

5. Please describe the anticipated demand for the proposed target populations served in this location.

This development will serve seniors age 62 and over. The demand for senior housing, particularly affordable senior housing, is extremely high in the Madison area and is expected to continue to grow as the Baby-boomer generation (born 1946-64) ages and needs new housing options. According to the 2016 City of Madison Biennial Housing Report, this age cohort will drive a significant increase in senior housing demand. The report also indicates a higher disability rate for older individuals, which also increases demand for housing specifically designed for seniors. Lastly, income is another factor for senior housing demand. Median household income decreases with age, making the affordability component of this development even more critical. A full market study will be completed for the WHEDA application later this year and will be available to City staff for review. Demand for this type of housing can also be found in the market study we provided to you with our application last year at the Elderberry site.

INTEGRATED SUPPORTIVE HOUSING UNITS

6. Provide the number and percent of integrated supportive housing units proposed, the income category(ies) targeted for these units, and the population(s) you propose to serve (e.g. households experiencing or at risk of homelessness, formerly homeless families residing in Permanent Supportive Housing no longer in need of intensive support services, veterans, persons with disabilities, formerly incarcerated individuals, other, etc.).

AgeBetter Community Living includes (15) integrated supportive housing units at 30% AMI that are affordable to very low income individuals. This development will serve seniors age 62 and over. For the supportive housing units in particular, the targeted population will be extremely low-income seniors that are veterans and/or have a disability, and are in need of stable, accessible, affordable housing.

7. Please describe your proposed integrated supportive housing approach that will go beyond meeting WHEDA's supportive housing requirements outlined in the Appendix S Checklist of the WHEDA Qualified Allocation Plan targeting veterans and/or persons with disabilities. Please elaborate on which target populations you plan on serving and what supportive service partnership approach(es) you will use.

As described above, the targeted population for the supportive housing units will be extremely low-income senior, including veterans and persons with a disability. Referrals and services will be coordinated with a number of partners as outlined in the question below. AgeBetter will provide supportive services, coordination, and referrals for the development. In addition, the development will emphasize outreach to ensure the housing is available to a diverse set of seniors. The recent City of Madison Analysis of Impediments to Fair Housing Choice indicated that Black and Asian households are two to three times more likely to be low-income and severely cost-burdened as renters, as compared to white households. With that discrepancy in mind, the development needs to strategically target seniors across all races and ethnicities. All residents within the development will have access to Oakwood campus amenities and SAIL membership.

8. Identify the partnership(s) with supportive service agencies that have been or will be formed to serve the target population(s) for the supportive housing units, including service provider(s) from the Continuum of Care (see Attachment C), if applicable. Provide a detailed description of the type and level of supportive services (such as assessment and referral, on-site intensive case management, etc.) that will be provided to residents of the proposed project.

AgeBetter, Inc., which will be part of the ownership entity as mentioned, is a nonprofit organization whose members are Attic Angel Association and Oakwood Village. Through its Sharing Active Independent Lives (SAIL) program, AgeBetter will provide supportive services, coordination and referrals at AgeBetter Community Living. SAIL is a membership program designed to support the health and well-being of seniors as they age. The focus is on independence through connections. It helps older adults continue to thrive through involvement, interactions, and learning. SAIL provides numerous services including access to pre-screened service providers, social and educational programs, transportation, medication reviews, volunteer opportunities and services, daily check in services, financial education and connections to SAIL members who are experts in insurance programs, budgeting, bill paying, financial planning with limited income/assets, and more.

Residents at the property will be encouraged to join SAIL. Membership fees will vary with income levels, as AgeBetter has the ability to offer discounted or, if needed, free memberships to seniors with low incomes. As with all services, participation is voluntary. Residents will have access to services and events throughout Madison and at the property. The development will serve as a "hub" for SAIL events and programming. Residents will also have access to services and amenities provided by AgeBetter's member organizations: Attic Angel Association and Oakwood Village. These include access to a nature preserve; social, educational, and wellness-related programs; bus service; meal services; clinical services including rehab services; etc.

Residents will also benefit from SAIL's collaborative relationships with multiple service agencies and educational institutions. This includes NewBridge Madison, Inc. which offers case management, home chore, and transportation services to seniors with low-incomes; RSVP of Dane County, a nonprofit offering volunteer opportunities in the community, rides to medical appointments, and education through its Triad program; and VRI, a company providing discounted personal emergency response systems. The Dane County Aging and Disability Resource Center provides provide benefits counseling to residents and referrals to local resources. SAIL's relationships with UW Madison Nursing, Pharmacy, and Schools of Human Ecology as well as Edgewood College's Nursing Program provides residents with 1:1 student-senior partnering opportunities focused on prevention of injuries and illnesses that cause loss of independence.

9. In order to ensure the success of the development, the partnership(s), and the tenants, describe the level of financial support that the development will provide annually to the identified supportive service agency/agencies, if applicable.

Attach a letter from the service provider(s) detailing the services they intend to provide to residents of the supportive housing units, the cost of those services and how those services will be financially supported (i.e., through the development, fundraising, existing program dollars, etc.).

AgeBetter, Inc. is the primary service provider and coordinator for this development through the SAIL program and their connections to other senior service providers. AgeBetter, Inc., formerly named Madison Area Continuing Care Consortium, began in 1998 and has been running the SAIL program since 2005. The program is funded with a combination of member dues, donations, grants, and program income.

AgeBetter is a co-applicant for this funding and is a permanent stakeholder as part of the long term ownership of AgeBetter Community Living. AgeBetter, Inc. will own 51% of the Managing Member entity and will have a right of first refusal to purchase the project. They will receive a portion of developer fee, cash flow, and residual value as part of their participation in the project and as compensation to act as a coordinator of programming services and activities for residents.

10. Identify any sources of non-City provided funding sources contemplated for supportive services.

As described above, AgeBetter, Inc. is a longstanding nonprofit with an established SAIL program and network of local service partners. AgeBetter is funded with a combination of member dues, donations, grants, and program income. They will receive a portion of developer fee, cash flow, and residual value for AgeBetter Community Living as compensation for their participation and service provider and coordinator role.

TENANT SELECTION, AFFIRMATIVE MARKETING & BARRIERS TO ENTRY

11. Describe your plans to incorporate flexible tenant selection criteria for households who are connected to supportive services, in order to provide housing opportunities for persons or families who would otherwise face common obstacles obtaining housing (e.g., poor credit, negative rental history, criminal conviction records, etc.). Specifically outline how this proposal embraces the City of Madison Tenant Selection Best Practices (Attachment B-1 of the RFP) and provides the maximum feasible flexibility in tenant selection to the general population and supportive service units.

Gorman & Company, as property manager, will draft a tenant selection plan that includes City of Madison Best Practices. This includes clearly outlining income and occupancy criteria, standards for credit reports and housing history, preferences/age restrictions, and the waitlist process.

Gorman management will utilize tenant screening policies to achieve flexibility and accommodations for resident applicants with barriers to housing. In making any determination with respect to an applicant admission, Gorman & Company shall work with the Applicant so as to not reject such Applicant unless a preponderance of the information available demonstrates that such Applicant, if admitted, would be likely to interfere with other residents in such a manner as to diminish their enjoyment of the premises, adversely affecting their health, safety or welfare, the physical environment, or the financial stability of the Property. Specifically, Gorman will not deny an Applicant solely based on:

- Lack of housing history
- A low credit/screening score provided the Applicant has a qualified cosigner or is enrolled in a credit repair program.
- Information on a credit report that is or has been formally disputed, in repayment, or unrelated to a past housing or housing utility obligation.
- The applicant owes money to a prior landlord for rent or damages or to a utility company, provided the applicant has entered into a payment arrangement with the debtor and is current on the repayment arrangement.

12. Describe the planned approach, relationship and coordination between the Property Manager and the lead Supportive Service Coordination Agency for lease up and ongoing services. How will these entities work together to ensure a successful development in the context of the greater neighborhood and community?

Gorman & Company has extensive property management experience, working with a variety of different populations and ensuring all needs are met by residents. Similarly, Gorman & Company routinely has partnered with resident service providers and has developed a successful partnership model that fosters open communication and feedback in order to create the best outcomes for residents. Gorman & Company and AgeBetter will be true partners and stakeholders in the development to ensure the units are collaboratively designed with universal design concepts and managed in a way that will fully optimize being the fact that this affordable senior development will be a part of the Oakwood campus.

13. Describe the proposed development's minimum occupancy standards that will prevent or reduce over-housing residents in such limited affordable housing opportunities.

The proposed minimum occupancy standard is one person per bedroom.

14. Describe your affirmative marketing strategy and any other strategies to engage your intended population. Specifically outline how you will embrace the City of Madison's Affirmative Marketing Plan Best Practices (Attachment B-2 of the RFP), especially for Asian and Latinx populations which tend to be under-represented in AHF Completion Reports.

The targeted population for the supportive housing units will be extremely low-income seniors, including veterans and persons with a disability. Referrals and services will be coordinated with a number of partners as outlined in the question below. In addition, the development will emphasize outreach to ensure the housing is available to a diverse set of seniors. The recent City of Madison Analysis of Impediments to Fair Housing Choice indicated that Black and Asian households are two to three times more likely to be low-income and severely cost-burdened as renters, as compared to white households. With that discrepancy in mind, the development needs to strategically target seniors across all races and ethnicities.

Dana Warren is an AgeBetter SAIL member, long-time Madison resident, and former City of Madison Real Estate Agent. For this development, Dana is focused on establishing a network for outreach to underserved senior populations, particularly African Americans. This includes working with the Urban League, 100 Black Men of Madison, and local churches to identify low-income seniors that may be interested and eligible for housing at AgeBetter Community Living. During this past year SAIL has started an ethnic diversity committee to increase outreach and overall ethnic diversity.

15. How will you affirmatively market to populations that will be identified as least likely to apply? Please reference successful past practices, relationships with agencies and/or marketing materials used.

See above for efforts by AgeBetter to specifically target African American seniors. In addition, Gorman as property manager has experience and interaction with multiple nonprofits and agencies in the Madison area that serve both families and seniors. This includes the Community Action Coalition, Joining Forces for Families, VA Homeless Program, YWCA, Porchlight Veterans program, and Housing Initiatives. Asian and American Indian populations are often identified as least likely to apply, therefore outreach will also include organizations such as Freedom, Inc.; ConNEXTions; Asian Outreach Program; and the Native American Center for Health Professions.

16. Describe the proposed development's security deposit policy (e.g., ½ or 1x's rent, other set amount(s), criteria for variations if credit is conditional, etc.). What is the policy for units with a guaranteed rent subsidy or voucher?

Gorman & Company will adopt the Security Deposit policy as set forth in the Madison RFP Attachment B-1.

17. Describe the proposed development's policy on limiting rent increases for lease renewals? How will prospective long-term tenants be protected from significantly and rapidly rising contract rents allowed by WHEDA?

It is necessary for affordable housing projects to assure that rent increases are at least equal to operating expense increases. As you are aware, cash flow on these deals are not robust and usually hover around a 1.20 DCR which are consistent with covenants for permanent financing. In the event the City of Madison feels a cap on rent increases are necessary, it would have to follow a formula that would give assurance that operating expenses would not negatively trend against rent increases. However, if no such formula is imposed then Gorman & Company would be willing to discuss a mutually agreed upon rent increase cap that would be applied to all AHF projects.

PUBLIC PURPOSE AND RISK

18. Please describe the public purpose of your proposal and the risks associated with the project.

The goal of this proposal is to develop high quality affordable senior housing, in partnership with an established and experienced senior service provider, that will offer the necessary support and resources that seniors need to remain independent and healthy.

The risk of this proposal is not receiving an award of WHEDA 9% tax credits, which is critical to moving the project forward. In this regard, Gorman has an excellent track record in applying for and securing WHEDA funding. In the last 5 years alone (2016-2020), Gorman has received ten WHEDA 9% tax credit awards. Although this application is geared toward submitting a 9% LIHTC application there is a possibility that a 4% Federal and 4% State credit application could work and score more competitively. Due to the fact that the 2021 WHEDA QAP just came out July 10, 2020 we have not fully analyzed and decided which type of application we will file with WHEDA.

SITE INFORMATION

19. Address of Proposed Site: 6145 Mineral Point Rd. Madison WI 53705

20. In which of the following areas on the Affordable Housing Targeted Area Map (see Attachment A) is the site proposed located? Please check one.

- Preferred Area (New Construction Only)
- Super-Preferred Area (New Construction Only)
- Eligible Area (New Construction & Acquisition/Rehabilitation)
- Targeted Rehab Area (Ineligible for New Construction, but preferred for acquisition & rehabilitation)

21. Identify the neighborhood in which the site is located: Oakwood Village

22. Date Site Control Secured: 7/9/2020

23. Explain why this site was chosen and how it helps the City to expand affordable housing opportunities where most needed. Describe the neighborhood and surrounding community. Provide the streets of the closest major intersection as well as known structures/activities surrounding the site that identifies where the site is located. (Attach a map indicating project location. Include one close-up map of the site and a second map using the AHF Targeted Area Map to show the site in the context of the City.)

This site was chosen to incorporate an affordable housing component within the Oakwood West campus. The benefit of the site is that it is within the Oakwood West community and will benefit from access to services enjoyed by existing Oakwood residents. It appears from the map that this site is "Eligible" however, it appears to be just outside of a "Super-Preferred" area which incorporates the west side of the Oakwood campus. In other words this site is merely 500 feet from a "Super-Preferred Area" and incorporated within that same campus.

24. Identify any existing buildings on the proposed site, noting any that are currently occupied. Describe the planned demolition of any buildings on the site.

There is currently a vacant building on the site, that previously served the campus as an old thrift shop that is no longer in business. The building is currently vacant and has been authorized to be demolished for this project by the Oakwood Village.

25. Identify the distance the following amenities are from the proposed site.

Type of Amenities & Services	Name of Facility	Distance from Site (in miles)
Full Service Grocery Store	Hy-Vee	0.95
Public Elementary School	Stephens Elementary School	0.54
Public Middle School	Thomas Jefferson Middle School	0.83
Public High School	James Madison Memorial	0.76
Job-Training Facility, Community College, or Continuing Education Programs	Upper Iowa University	1.70

Childcare	Leaning Gardens	0.50
Public Library	Madison Public Library - Sequoya	1.84
Neighborhood or Community Center	Lussier Community Education Center	0.90
Full Service Medical Clinic or Hospital	UW Health Oakwood Clinic	0.20
Pharmacy	CVS Pharmacy	0.56
Public Park or Hiking/Biking Trail	Garner Harrison Park/Oakwood Nature Preserve	0.51
Banking	Summit Credit Union	0.25
Retail	West Towne Mall	0.99
Other (list the amenities):	Oakwood Campus Amenities including... food service, grocery store, physical therapy services, chapel, and Oakwood Arts Center.	0.20

26. What is the actual walking distance between the proposed site and the nearest seven-day per week transit stops (i.e. weekday and weekends)? List the frequency of service at that bus stop during both the weekday and on the weekends (e.g., hourly, ½ hour, commuter hours). List the bus route(s) numbers, seven-day transit stop street intersections and describe any other transit stops (include street intersections and schedule) located near the proposed site. Please do not include full bus schedules.

The proposed site is strategically positioned within less than a mile walking distance of a variety of amenities. A majority of amenities that are not within a walking distance of the site can be reached via public transit. The nearest public transit stop is 650ft away from the site and runs 7 days a week. The Mineral Point & Island bus stop (ID: 6941 Route 67) runs weekdays and weekends beginning at 6:49am and operating through 10:49pm with intervals every 30 min.

27. Describe the walking and transit routes for children to get to their elementary and middle schools.

N/A - this is an elderly senior development targeted to individuals and households age 62+

28. Describe the transit options for people to access employment and amenities such as childcare, after school activities, grocery stores, the nearest library, neighborhood centers, and other amenities described above.

As this project will target seniors 62+, the priority is transportation options to grocery, library, senior centers, etc. As mentioned above, this property is within 650ft of a regular bus stop, but also within a mile of a grocery, clinic, pharmacy, and public park. In addition, residents will have access to SAIL's volunteer transportation and county supported transportation –e.g. RSVP, Group Access (nutrition sites, senior centers, or shopping), and OATA (Older Adults Transportation Assistance). AgeBetter's members, which are Oakwood and Attic Angels, have shuttles available, and we would pursue a partnership with them to take advantage of transportation services to social events, programming, etc.

29. Describe the impact this housing development will have on the schools in this area. What percent are the current enrollment and 5-year projected capacities for the area schools? Ideal enrollment is considered 90%. Are the schools projected to be at, above, or below capacity? Approximately how many elementary and middle school children are projected to live at the proposed housing development based on your proposed unit mix and previous housing experience. CDD recommends contacting Kristian Chavira at the Madison Metropolitan School District for information on potential impact to public schools at kachavira@madison.k12.wi.us. Existing school capacity information can also be found at: https://accountability.madison.k12.wi.us/files/accountability/uploads/2019-11_fall_enrollment_reports.pdf

N/A - this is an elderly senior development targeted to individuals and households age 62+

30. Describe the historical uses of the site. Identify if a Phase I Environmental Site Assessment has been completed and briefly summarize any issues identified. Identify any environmental remediation activities planned, completed, or underway, and/or any existing conditions of environmental significance located on the proposed site.

This site was used as a thrift shop previously, and Oakwood has identified no environmental issues related to the site.

31. Current zoning of the site: Planned Development District An interactive version of the Zoning Map can be found linked [here](#).
32. Describe any necessary planning and zoning-related approvals (rezoning, conditional use permit, demolition, etc.) that must be obtained for the proposal to move forward.

Based on our pre-application meeting with zoning and planning staff, it appears this site must receive an amendment to the Planned Development District in place and which will require zoning approval that will proceed through the necessary committees and common council.

33. Describe the proposed project's consistency with adopted planning documents, including the City of Madison Comprehensive Plan (both adopted and draft of the Comprehensive Plan update), the Neighborhood Plan(s), the Generalized Future Land Use Map, and any other relevant plans. An interactive version of the Generalized Future Land Use Map can be found linked [here](#).

This proposal will be designed to align with the current Generalized Future Land Use Map mentioned above, approved in 2011. That plan designated the proposed site area as "high density" allowing for 70+ units comprised of a 4-12 story buildings.

CITY AND COMMUNITY ENGAGEMENT PROCESSES

34. Briefly summarize the staff comments during your Pre-application meeting with City of Madison Planning and Zoning staff. Please include the date.

On July 6, 2020 Gorman & Company had a Zoom discussion with Julie Spears, Linette Rhodes and Kevin Firchow, during this meeting we discussed the benefits of the location which include incorporating an affordable component on the Oakwood campus and the proximity to a bus stop and services provided to other Oakwood residents on the campus. Negatives of the site was discussed as having to amend the PDD which will involve a rezoning process.

35. Have you presented to the City's Development Assistance Team (DAT)? If so, please summarize the staff comments to your proposal and reference the date of the presentation. If not, what is the anticipated date of the DAT presentation?

No, our scheduled DAT meeting is Thursday July 16th at 9:00am.

36. Describe the response of the alderperson in which the proposal is located, as well as the adjacent alderperson(s), if applicable. What issues or concerns with the project did s/he identify, if any? How will those be addressed?

We have reached out to Alderman Keith Furman via email and multiple voicemails in regards to the proposed project. We are awaiting the his response and will share with the city once we hear back.

37. Describe the neighborhood and community input process, including notification to and input from the nearby Neighborhood Association(s), already underway and planned. What issues or concerns with the project has been identified, if any? How will those be addressed?

This Development has been approved by the AgeBetter board of directors (partnership between Oakwood Village and Attic Angels). This project has also been approved by the necessary Oakwood Village Boards. We are planning to schedule an Oakwood neighborhood meeting which will be via Zoom. People will be invited to this meeting via US Mail and email in a matter that satisfies the Alderman. This date will be in compliance with Madison RFP guidelines in the next several of weeks and will incorporate households surrounding the Oakwood Campus.

38. Amid the environment created by the COVID-19 pandemic, how will you engage and communicate with residents and stakeholders differently than in years past?

We will provide campus residents and residents surrounding the campus an opportunity to provide comment and be involved in a neighborhood meeting via Zoom. Notices for this meeting will be sent out via US Mail and email in a matter that satisfies the Alderman.

39. Describe your plans for supplemental neighborhood meetings and other ways of engaging residents. How will residents be engaged or given the opportunity to participate in the design process (e.g., steering committee, charrette, survey, presentations, website, etc.)?

Our site control document provides an opportunity for Oakwood Village to provide consent to the final design of the building. This process will provide for meetings to occur to inform residents of the design concepts and will solicit input from residents as part of this design process in the same manner as we are conducting resident informational meetings discussed above.

40. Describe how this development will promote social equity in the community and the greater Madison area. How will the proposal embrace the City's [Racial Equity and Social Justice Initiative](#)?

Dana Warren is an AgeBetter SAIL member, long-time Madison resident, and former City of Madison Real Estate Agent. For this development, Dana is focused on establishing a network for outreach to underserved senior populations, particularly African Americans. This includes working with the Urban League, 100 Black Men of Madison, and local churches to identify low-income seniors that may be interested and eligible for housing at AgeBetter Community Living.

SITE AMENITIES

41. Describe the exterior amenities that will be available to tenants and guests (e.g., tot lot or play structure, outdoor exercise equipment, patio, permanent tables and chairs, greenspace, grill area, gardens, etc.).

This development is located on the Oakwood campus which has the following amenities: walking paths in the Oakwood nature preserve, outside eating areas associated with food service, and a bus stop within 650ft. We are currently in the process of analyzing what outdoor spaces are available for residents to enjoy on this specific site including patio space and rooftop areas.

42. Describe the interior common area amenities that will be available to tenants and/or guests (e.g., community rooms, exercise room, business center, etc.). What parking will be provided and at what cost? Will the cost vary by CMI level? For family developments, will there be a year-round indoor play space for children?

Interior common area amenities include a community room and lounge, space for outside service providers, fitness room, and offices for management and SAIL. There will be 63 underground parking spaces at \$60 a month, and 15 surface spaces at no cost.

43. Describe the interior apartment amenities, including plans for internet service (and cost to tenants, if any) and a non-smoking indoor environment throughout the building.

In-unit internet will be at no cost to residents, per current WHEDA scoring. The building and outdoor areas will be designated non-smoking.

This development will serve seniors age 62 and over, and therefore it is anticipated that many of these households will have a disability and require accessible units with additional universal design features. AgeBetter has prioritized accessible design and the development team is committed to going above and beyond the minimum code and WHEDA standards to ensure residents can remain in their units as they age and require additional accommodations. Unit floor plans and common areas are being designed and programmed in tandem with AgeBetter, including input from Jane Earl, a SAIL member who is an advocate for incorporating universal design. Apartments will have in-unit washer/dryers, and residents will have access to underground parking

PROPOSAL TIMELINE

44. Please list the estimated/target completion dates associated with the following activities/benchmarks to illustrate the timeline of how your proposal will be implemented.

Activity/Benchmark	Estimated Month/Year of Completion
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [<i>Target/Actual Month/Date</i>]	July 2020
1 st Development Assistance Team/ Meeting (Due by 8/6/20) [<i>Target/Actual Month/Date</i>]	July 2020
1 st Neighborhood Meeting (Due by 8/19/20) [<i>Target Month/Date</i>]	August 2020
Submission of Land Use Application (Zoning Map Amendments Due by 9/16/20)	August 2020
Submission of Land Use Application (Permissively Zoned Due by 10/7/20)	N/A
Plan Commission Consideration (If Rezoning, Due by 11/23/20 for 12/1/20 Common Council)	November 2020
Urban Design Commission Consideration, if applicable [<i>Target Month/Date</i>]	October 2020
Application to WHEDA	December 2020
Complete Equity & Debt Financing	March 2022
Acquisition/Real Estate Closing	March 2022
Rehab or New Construction Bid Publishing	January 2022
New Construction/Rehab Start	March 2022
Begin Lease-Up/Marketing	January 2023
New Construction/Rehab Completion	June 2023
Certificates(s) of Occupancy Obtained	June 2023
Complete Lease-Up	December 2023
Request Final AHF Draw	December 2023

HOUSING INFORMATION & UNIT MIX

45. Provide the following information for your proposed project. List the property address along with the number of units you are proposing by size, income category, etc. If this is a scattered site proposal, list each address separately with the number of units you are proposing by income category, size, and rent for that particular address and/or phase. Attach additional pages if needed.

ADDRESS #1:		6165 Mineral Point Rd.					Projected Monthly Unit Rents, Including Utilities					
% of County Median Income (CMI)	Total # of units	# of Bedrooms					\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs	
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs						
≤30%	15	0	13	2	0	0		563	675			
40%	0	0	0	0	0	0						
50%	30	0	26	4	0	0		895	1077			
60%	18	0	14	4	0	0		1070	1282			
LIHTC Sub-total	63	0	53	10	0	0						
Market*	12	0	10	2	0	0		1245	1507			
Total Units	75	0	63	12	0	0	Notes:					

*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; Market = >61% CMI.

ADDRESS #2:		# of Bedrooms					Projected Monthly Unit Rents, Including Utilities					
% of County Median Income (CMI)	Total # of units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs	
												≤30%
40%	0	0	0	0	0	0						
50%	0	0	0	0	0	0						
60%	0	0	0	0	0	0						
LIHTC Sub-total	0	0	0	0	0	0						
Market*	0	0	0	0	0	0						
Total Units	0	0	0	0	0	0	Notes:					

*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; Market = >61% CMI.

NOTE: For proposals contemplating project-based vouchers (PBVs), please list vouchered units under the same CMI designation that you will be representing to WHEDA (e.g. if the LIHTC application to WHEDA presents 8 PBV units as 50% CMI or 60% CMI units, please include those on the “50%” or “60%” row in the above table(s)). The City of Madison will enforce this income designation in the AHF Loan Agreement, if this proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.

46. Utilities/amenities included in rent: Water/Sewer Electric Gas Free Internet In-Unit
 Washer/Dryer Other: _____

ENERGY EFFICIENCY, RENEWABLE ENERGY & SUSTAINABLE DESIGN

47. What is your organization's track record of developing projects that incorporate extraordinary sustainable, energy efficient, and/or green building design techniques? Please list any awards, industry standards or third-party certifications achieved on projects developed in the past ten years, LEED®, WELL, Passive House, etc.

At Gorman & Company, we know we have a far-reaching impact on the environment through the completion of our varied projects. We employ a holistic approach to sustainable design. Our approach begins with environmental awareness, continues through the design and specification of building materials and systems, and includes building operation and personnel training. Most of our projects are designed to Wisconsin Green Built Home Standards. Green building features could include hard surface flooring throughout the developments, low flow plumbing fixtures, highly reflective roofing including solar panels, and Energy Star appliances and windows. Our goal is that 100% of the units will be designed utilizing Universal Design principles.

48. Please describe how this proposed development will contribute to the City's goal of 100% renewable energy and zero-net carbon emissions (originally adopted March 21, 2017). For more information, see [100% Renewable Madison Report](#).

We will be conforming to Wisconsin Green Built Home standards and include solar panels.

49. Please describe the proposed project's energy efficiency goals. Please attach a copy of the confirmation page demonstrating that your organization has submitted an [Initial Application](#) for Focus on Energy's Energy Design Assistance program. Identify any third party certification, such as LEED®, WELL, Passive House or similar, that will be sought.

AgeBetter Community Living will achieve a Wisconsin Green Built Home score that we will continue to analyze as we design to hopefully maximize WHEDA scoring.

We have completed and submitted an Initial Application for Focus on Energy's Energy Design Assistance program.

50. How will this project contribute to creating a walkable, human-scaled community inside and outside the property lines?

The site is currently a vehicle dominated location, however our proposed building would help change this by fronting the city sidewalk with a four-story building for 175' in length. Additionally, interior community spaces for the development would be located on the first floor fronting the city sidewalk with ample storefront glazing to activate the street and pedestrian traffic on the city sidewalk. Within the property lines, we are proposing a pedestrian walkway that connects perpendicular to the city sidewalk and allows pedestrians to access the site without crossing vehicle traffic (vehicle traffic will enter on the other side of the building in the existing drive aisle). Additionally, seven of the first floor apartments are proposed to have townhome entries directly accessed from this sidewalk.

51. Describe how the local south-Central Wisconsin climate will inform the design of the proposed development and the challenges it will present.

The south-Central Wisconsin climate will inform the design of the proposed development significantly. There is a balance that is needed between providing ample natural light through windows and the energy loss that occurs through the same windows. Highly energy efficient windows are a must along with high R-value on insulating systems. Additionally, giving the residents options for cooling their apartment is extremely important in the summer.

52. Describe this development's proposed strategies to reduce reliance on municipal water sources (i.e. water efficiency). Will the development incorporate systems to recapture and/or reuse water generated on-site?

The development will utilize low-flow water-sense certified plumbing fixtures throughout. The development also will capture roof rain water thru downspouts and either direct it to strategically irrigate the lawn or store it in rain barrels for use in irrigation by maintenance personnel. Additionally the green space will be designed to keep most rain runoff out of the storm sewer by absorbing the site water with creative landscaping and civil engineering.

53. What building design and HVAC considerations will your team include to enhance community resiliency for building inhabitants in the face of a potential future pandemic?

HVAC design will be compartmentalized for each dwelling to have its own HVAC system. Additionally, the common areas will be compartmentalized to limit airflow from specific programmed spaces to others while still providing outside air circulation

54. Describe this development's approach to accessibility, including the number and percent of accessible units proposed for each of level of accessibility. Will this development meet or exceed the minimum requirements? For rehab, describe the accessibility modifications that will be incorporated into the existing development.

1. All units and common areas will be visitable.
2. We are planning to incorporate universal design elements in each apartment so that residents can successfully age in place.
3. Per WHEDA requirements we will provide a minimum of 3 (4%) fully accessible (504) units

55. For proposals that include rehabilitation, have you completed a capital needs assessment for this property? If so, summarize the scope and cost; Attach a copy of the capital needs assessment.

N/A

REAL ESTATE PROJECT DATA SUMMARY

56. Enter the site address (or addresses if scattered sites) of the proposed housing and answer the questions listed below for each site.

	# of Units Prior to Purchase	# of Units Post-Project	# Units Occupied at Time of Purchase	# Biz or Residential Tenants to be Displaced	# of Units Accessible Current?	Number of Units Post-Project Accessible?	Appraised Value Current (Or Estimated)	Appraised Value After Project Completion (Or Estimated)	Purchase Price
Address:	6145 Mineral Point Rd.								
	0	75	0	0	0	15	500,000		500,000
Address:									
Address:									

57. Identify any existing buildings on the proposed site, noting any that are currently occupied. Describe the planned demolition of any buildings on the site.

There is currently a vacant building on the site, that previously served the campus as an old thrift shop that is no longer in business. The building is currently vacant and has been authorized to be demolished for this project by Oakwood Village.

58. Will any business or residential tenants will be displaced temporarily or permanently? If so, please describe the relocation requirements, relocation plan and relocation assistance that you will implement or have started to implement.

No.

DEVELOPMENT TEAM

59. Describe the project's organizational structure. Please attach an organizational chart detailing the roles of the applicant, all partners, and the ownership interest percentages of each party.

The project would be owned by a Limited Liability Company set up for the purpose of owning this development. That LLC would then have 99.99% of its interest owned by a Low Income Housing Tax Credit Investor member. The other 0.01% would be owned by a Managing Member LLC that would be comprised of 51% - AgeBetter, Inc. and 49%- Gorman & Company, LLC.

60. For projects that will be co-developed with a non-profit partner, please explain the non-profit's role in the development. State if the non-profit will have a controlling interest, Right of First Refusal, or General Partner Purchase Option. If not, please elaborate on how the non-profit organization will be involved in the long-term ownership of the development.

AgeBetter, Inc. is a 501(c)(3) nonprofit organization and will own 51% of the Managing Member entity. AgeBetter is a long term stakeholder in the development; and will have a right of first refusal to purchase the project. AgeBetter will provide supportive services, coordination, and referrals for the development, along with universal design consultation.

61. Identify all key roles in your project development team, including architect, general contractor, legal counsel, property management agent, supportive services provider(s), and any other key consultants, if known.

Contact Person	Company	Role in Development	E-mail	Phone
Ted Matkom	Gorman & Company	Developer	tmatkom@gormanusa.com	414-617-9997
Ron Swiggum	Gorman & Company	General Contractor	rswiggum@gormanusa.com	608-835-5534
Sarah Ponko	Gorman & Company	Lead Architect	sponko@gormanusa.com	608-835-3900
Dan Clark	Gorman & Company	Property Manager	dclark@gormanusa.com	608-835-7757
Luis Herrera	Gorman & Company	Development Coordinator	lherrera@gormanusa.com	608-835-3066
Duane Buscher	Gorman & Company	Financial Analyst	dbuscher@gormanusa.com	608-835-3633
Ann Albert	AgeBetter	Support Services/Design	ann@agebettertoday.org	608-230-4445
Joe Shumow	Reinhart Boerner Van Deuren	Legal Counsel	jshumow@reinhartlaw.com	608-229-2245

62. For the following development team roles, please identify the number and/or percentage of women and persons of color employed by that company.

Company	Role in Development	# or % Employees who are Women	# or % Employees who are Persons of Color
Gorman & Company	Developer	50%	36.4%
Gorman & Company	General Contractor	50%	36.4%
Gorman & Company	Property Manager	50%	36.4%
Gorman & Company	Architect	50%	36.4%
AgeBetter, Inc.	Service Provider	100%	0%

DEVELOPMENT TEAM EXPERIENCE AND CAPACITY

Please describe the development team's experience in obtaining and successfully implementing LIHTC developments in accordance with the Additional Application Materials Section 2.4, Item 2 of the RFP.

REFERENCES

63. Please list at least three references who can speak to your work on similar developments completed by your team.

Name	Relationship	Email Address	Phone
Maria Prioletta	City of Milwaukee Housing and Neighborhood Development Manager	maria.priolettamilwaukee.gov	414-286-5903
Tim Freitag	City Administrator, City of Jefferson	tfreitag@jeffersonwis.com	608-674-7700
Mayor Paul Esser	Mayor, City of Sun Prairie	pesser@cityofsunprairie.com	608-825-1164

PLEASE ATTACH THE FOLLOWING ADDITIONAL INFORMATION AND CHECK THE BOX WHEN ATTACHED:

- 1. A completed Application Budget Workbook, showing the City's proposed financial contribution and all other proposed financing.
- 2. Description of the Development Team's Experience and Capacity per Section 2.4, Item 2 of the RFP.
- 3.a. Letter(s) from Supportive Service Provider(s) detailing what services are necessary to be adequate for the number of supportive housing units and target population as well as what level of services they intend to provide.
- 3.b. A detailed map of the site and a second map using the AHF Affordable Housing Targeted Area Map showing the site in the context of the City.
- 3.c. A preliminary site plan and drawings, if available.
- 3.d. A Capital Needs Assessment report of the subject property, if the proposal is for a rehabilitation project and if the report is available at the time of application.
- 4. A confirmation page demonstrating that an Initial Application for Energy Design Assistance was submitted to Focus on Energy
- 5. Written confirmation from the Zoning Administrator of permissive zoning or a letter confirming the proposed site's zoning status and process.

NOTE: If a preliminary site plan is not available at the time of application, submittal will be required for DAT on August 6, 2020 with submittal with week prior. If the Capital Needs Assessment is not available at the time of application for a rehab project, submittal will be required by August 19, 2020.



Development Budget Workbook

This budget workbook is based on the prior QAP and we would request leave to amend this document to increase our competitive scoring if need be and to conform to the newly issued QAP once our team has had a chance to review the new QAP in a thorough manner.

APPLICANT & PROJECT NAME:

Gorman & Company, AgeBetter Community Living

1. CAPITAL BUDGET

Enter ALL proposed project funding sources.

FUNDING SOURCES

Source	Amount	Non-Amortizing (Y/N)	Rate (%)	Term (Years)	Amort. Period (Years)	Annual Debt Service
Permanent Loan-Lender Name:						
First Mortgage - TBD	\$ 5,220,000	N	4.75%	16	35	\$306,220
Subordinate Loan-Lender Name:						
Dane County AHDF	\$ 450,000	Y	0.00%	16		
Subordinate Loan-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
AHP Loan	\$ 900,000	Y	0.00%	40	40	
City-AHF Deferred Loan	\$ 604,110	Y	0.00%	16		
City-AHF Interest/Cash Flow Loan	\$ 604,110	Y	2.25%	16	30	
City-TIF Loan						
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 9,642,992					
Historic Tax Credit Equity						
Deferred Developer Fees	\$ 773,128					
Owner Investment						
Other-Specify:						
Total Sources	\$ 18,194,340					

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
Construction Lender - TBD	\$ 13,000,000	4.00%	24
Bridge Loan-Lender Name:			
City-AHF Loans, County, AHP, Deferred Fee	\$ 3,747,891		24
Tax Credit Equity:			
	\$ 1,446,449		
Total	\$ 18,194,340		

Estimated pricing on sale of Federal Tax Credits: **\$ 0.895**

Estimated pricing on sale of State Tax Credits:
 (if applicable)

Remarks Concerning Project Funding Sources:

APPLICANT:

Gorman & Company, AgeBetter Community Living

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$500,000
Existing Buildings/Improvements	\$0
Other (List)	
	\$0

Construction:	
Construction/Rehab Costs	\$10,683,900
Construction Profit	\$491,624
Construction Overhead	\$240,992
General Requirements	\$682,054
Construction Supervision	\$0
FF&E/Personal Property	\$75,000
Demolition	\$0
Site Work	\$400,000
Landscaping	\$150,000
Letter of Credit/P&P Bond	\$133,664
Construction Contingency	\$642,862
Other (List)	
	\$0

<--- If applicable, please list the costs attributable to "above and beyond" green building/Net Zero construction components included in the Construction Costs line item:

Total Cost:

\$0

Architectural & Engineering	
Architect - Design	\$367,717
Architect - Supervision	\$18,000
Engineering	\$160,000
Other (List)	
Plan Review, Copies, 3rd party inspections	\$33,500

Interim/Construction Costs	
Builder's Risk/Property Insurance	\$40,000
Construction Loan Interest	\$635,000
Construction Loan Origination Fee	\$130,000
Real Estate Taxes	\$80,000
Park Impact Fees	\$40,000
Other Impact Fees	\$0
Other (List)	
Construction Lender Legal & Due Diligence	\$25,500

Financing Fees	
Cost of Bond Issuance	\$0
Permanent Loan Origination Fee	\$67,200
Credit Enhancement	\$0
Other Permanent Loan Fees	\$15,000

Soft Costs	
Appraisal	\$6,000
Market Study	\$7,500

Environmental Reports	\$20,000
Survey	\$15,000
Permits	\$100,000
Lease-Up Period Marketing	\$15,000
Tax Credit Fees - Application	\$2,000
Tax Credit Fees - Compliance	\$4,125
Tax Credit Fees - Allocation	\$108,254
Accounting/Cost Certification	\$28,500
Title Insurance and Recording	\$30,000
Relocation	\$0
FF&E	\$65,000
Capital Needs Assessment (if rehab)	\$0
Legal	\$100,000
Other (List)	
Soft Cost Contingency	\$25,000
Fees:	
Bridge Loan Fees	\$1,000
Organizational Fees	\$0
Syndication Fees	\$50,000
Total Development Fee	\$773,128
Developer Overhead	\$801,872
Other Consultant Fees	\$0
Other (List)	
	\$0
Reserves Funded from Capital:	
Lease-Up Reserve	\$65,000
Operating Reserve	\$364,948
Replacement Reserve	\$0
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$0
Other: (List)	
	\$0
TOTAL COSTS:	\$18,194,340

APPLICANT:

Gorman & Company, AgeBetter Community Living

3. PROJECT PROFORMA

Enter total Revenue and Expense information for the proposed project for a 30 year period.

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Year 16
Gross Income	834,240	850,925	867,943	885,302	903,008	921,068	939,490	958,280	977,445	996,994	1,016,934	1,037,273	1,058,018	1,079,178	1,100,762	1,122,777
Less Vacancy/Bad Debt	58,397	59,565	60,756	61,971	63,211	64,475	65,764	67,080	68,421	69,790	71,185	72,609	74,061	75,542	77,053	78,594
Income from Non-Residential Use*		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Revenue	775,843	791,360	807,187	823,331	839,798	856,594	873,725	891,200	909,024	927,204	945,749	964,664	983,957	1,003,636	1,023,709	1,044,183
Expenses:																
Office Expenses and Phone	25,000	25,750	26,523	27,318	28,138	28,982	29,851	30,747	31,669	32,619	33,598	34,606	35,644	36,713	37,815	38,949
Real Estate Taxes	90,000	92,700	95,481	98,345	101,296	104,335	107,465	110,689	114,009	117,430	120,952	124,581	128,318	132,168	136,133	140,217
Advertising, Accounting, Legal Fees	13,000	13,390	13,792	14,205	14,632	15,071	15,523	15,988	16,468	16,962	17,471	17,995	18,535	19,091	19,664	20,254
Payroll, Payroll Taxes and Benefits	80,000	82,400	84,872	87,418	90,041	92,742	95,524	98,390	101,342	104,382	107,513	110,739	114,061	117,483	121,007	124,637
Property Insurance	25,000	25,750	26,523	27,318	28,138	28,982	29,851	30,747	31,669	32,619	33,598	34,606	35,644	36,713	37,815	38,949
Mtc, Repairs and Mtc Contracts	57,000	58,710	60,471	62,285	64,154	66,079	68,061	70,103	72,206	74,372	76,603	78,901	81,268	83,706	86,218	88,804
Utilities (gas/electric/fuel/water/sewer)	65,000	66,950	68,959	71,027	73,158	75,353	77,613	79,942	82,340	84,810	87,355	89,975	92,674	95,455	98,318	101,268
Property Mgmt	46,551	47,947	49,386	50,867	52,393	53,965	55,584	57,251	58,969	60,738	62,560	64,437	66,370	68,361	70,412	72,524
Operating Reserve Pmt		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	18,750	19,313	19,892	20,489	21,103	21,736	22,388	23,060	23,752	24,464	25,198	25,954	26,733	27,535	28,361	29,212
Support Services		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
WHEIDA LIHTC Asset Management Fee	3,375	3,476	3,581	3,688	3,799	3,913	4,030	4,151	4,275	4,404	4,536	4,672	4,812	4,956	5,105	5,258
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Operating Expenses	423,676	436,386	449,477	462,962	476,851	491,156	505,891	521,068	536,700	552,801	569,385	586,466	604,060	622,182	640,847	660,073
Net Operating Income	352,168	354,974	357,710	360,369	362,947	365,437	367,835	370,132	372,324	374,404	376,364	378,197	379,897	381,454	382,861	384,110
Debt Service:																
First Mortgage	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
LIHTC Investor Asset Management Fee	5,000	5,150	5,305	5,464	5,628	5,797	5,971	6,150	6,335	6,525	6,721	6,923	7,131	7,345	7,565	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	311,220	311,370	311,525	311,684	311,848	312,017	312,191	312,370	312,555	312,745	312,941	313,143	313,351	313,565	313,785	306,220
Total Annual Cash Expenses	734,895	747,756	761,002	774,646	788,698	803,173	818,082	833,437	849,254	865,545	882,325	899,609	917,411	935,747	954,632	966,293
Total Net Operating Income	40,948	43,604	46,185	48,685	51,099	53,421	55,644	57,763	59,770	61,659	63,423	65,055	66,546	67,889	69,076	77,890
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	40,948	43,604	46,185	48,685	51,099	53,421	55,644	57,763	59,770	61,659	63,423	65,055	66,546	67,889	69,076	0
Cash Flow	0	0	0	0	0	0	0	0	0	0	0	0	0	8,561	69,076	77,890
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	8,561	69,076	77,890

*Including commercial tenants, laundry facilities, vending machines, parking spaces, storage spaces or application fees.

DCR Hard Debt	1.15	1.16	1.17	1.18	1.19	1.19	1.20	1.21	1.22	1.22	1.23	1.24	1.24	1.25	1.25	1.25
DCR Total Debt	1.13	1.14	1.15	1.16	1.16	1.17	1.18	1.18	1.19	1.20	1.20	1.21	1.21	1.18	1.00	1.00

Assumptions

Vacancy Rate	7.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

*Please list all fees (per unit per month) and non-residential income:

APPLICANT:

Gorman & Company, AgeBetter Community Living

3. PROJECT PROFORMA (cont.)

Enter total Revenue and Expense information for the proposed project for a 30 year period.

	Year 17	Year 18	Year 19	Year 20	Year 21	Year 22	Year 23	Year 24	Year 25	Year 26	Year 27	Year 28	Year 29	Year 30
Gross Income	1,145,233	1,168,137	1,191,500	1,215,330	1,239,637	1,264,429	1,289,718	1,315,512	1,341,823	1,368,659	1,396,032	1,423,953	1,452,432	1,481,481
Less Vacancy/Bad Debt	80,166	81,770	83,405	85,073	86,775	88,510	90,280	92,086	93,928	95,806	97,722	99,677	101,670	103,704
Income from Non-Residential Use*	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Revenue	1,065,066	1,086,368	1,108,095	1,130,257	1,152,862	1,175,919	1,199,438	1,223,427	1,247,895	1,272,853	1,298,310	1,324,276	1,350,762	1,377,777
Expenses:														
Office Expenses and Phone	40,118	41,321	42,561	43,838	45,153	46,507	47,903	49,340	50,820	52,344	53,915	55,532	57,198	58,914
Real Estate Taxes	144,424	148,756	153,219	157,816	162,550	167,427	172,449	177,623	182,951	188,440	194,093	199,916	205,913	212,091
Advertising, Accounting, Legal Fees	20,861	21,487	22,132	22,796	23,479	24,184	24,909	25,657	26,426	27,219	28,036	28,877	29,743	30,635
Payroll, Payroll Taxes and Benefits	128,377	132,228	136,195	140,280	144,489	148,824	153,288	157,887	162,624	167,502	172,527	177,703	183,034	188,525
Property Insurance	40,118	41,321	42,561	43,838	45,153	46,507	47,903	49,340	50,820	52,344	53,915	55,532	57,198	58,914
Mtc, Repairs and Mtc Contracts	91,468	94,212	97,039	99,950	102,948	106,037	109,218	112,494	115,869	119,345	122,926	126,613	130,412	134,324
Utilities (gas/electric/fuel/water/sewer)	104,306	107,435	110,658	113,978	117,397	120,919	124,547	128,283	132,132	136,096	140,178	144,384	148,715	153,177
Property Mgmt	74,700	76,941	79,249	81,627	84,076	86,598	89,196	91,872	94,628	97,467	100,391	103,402	106,504	109,700
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	30,088	30,991	31,921	32,878	33,865	34,881	35,927	37,005	38,115	39,258	40,436	41,649	42,899	44,186
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)	5,416	5,578	5,746	5,918	6,096	6,278	6,467	6,661	6,861	7,067	7,278	7,497	7,722	7,953
Total Expenses	679,875	700,271	721,279	742,918	765,205	788,161	811,806	836,160	861,245	887,083	913,695	941,106	969,339	998,419
Net Operating Income	385,192	386,097	386,816	387,339	387,657	387,758	387,632	387,266	386,650	385,770	384,615	383,170	381,423	379,358
Debt Service:														
First Mortgage	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220	306,220
Total Annual Cash Expenses	986,095	1,006,491	1,027,499	1,049,138	1,071,425	1,094,381	1,118,026	1,142,380	1,167,465	1,193,302	1,219,915	1,247,326	1,275,559	1,304,639
Total Net Operating Income	78,972	79,877	80,596	81,119	81,437	81,538	81,412	81,046	80,430	79,551	78,395	76,950	75,203	73,138
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cash Flow	78,972	79,877	80,596	81,119	81,437	81,538	81,412	81,046	80,430	79,551	78,395	76,950	75,203	73,138
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	0

*Including laundry facilities, vending machines, parking spaces, storage spaces or application fees.

DCR Hard Debt	1.26	1.26	1.26	1.26	1.27	1.27	1.27	1.26	1.26	1.26	1.26	1.25	1.25	1.24
DCR Total Debt	1.26	1.26	1.26	1.26	1.27	1.27	1.27	1.26	1.26	1.26	1.26	1.25	1.25	1.24

Assumptions

Vacancy Rate	7.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

CITY OF MADISON RFP #8957-2020: AFFORDABLE HOUSING FUND

DEVELOPMENT TEAM'S EXPERIENCE AND CAPACITY

GORMAN & COMPANY, LLC has been in business since 1984 and brings a fully integrated company that includes development, construction, architectural, and property/asset management experience. This dynamic structure allows Gorman to develop projects in-house by bringing all sides of a transaction to the table at once, along with an extremely strong balance sheet and a spirit of flexibility and cooperation. In our 35 years in business, Gorman has been awarded tax credits from the Wisconsin Housing and Economic Development Authority (WHEDA) for over 30 affordable housing projects within the state. We have accumulated a portfolio that has resulted in a strong financial position, which allows us to guarantee all of our construction and performance obligations with municipalities and private partners.

GORMAN GENERAL CONTRACTORS, LLC serves as General Contractor on Gorman & Company development projects. The company believes that the best way to ensure high quality and timely construction is to build our projects with our own construction company and our own architects. With accountability of design and construction remaining within the Gorman & Company umbrella, it provides a greater attention to detail and we are better able to support each construction phase. Gorman has the ability to continually improve its construction practices with each successive development because everything is done in-house. Gorman's construction team consists of project managers, on-site field superintendents, and a Director of Construction - all of whom oversee work in progress. When challenges arise on the job site, Gorman General Contractors is positioned to quickly resolve issues through close collaboration with its in-house architectural staff.

GORMAN & COMPANY ARCHITECTURE AND DESIGN was formed in 1998. It has designed 30+ innovative affordable multifamily developments in six states. Gorman's architects specialize in historic adaptive reuse; mixed use, mixed income; and the new construction and preservation of affordable housing. Projects designed by Gorman & Company have won many awards and have attained the highest standards of sustainable/green design and accessible design.

GORMAN & COMPANY'S PROPERTY MANAGEMENT division was created in 1991. The property management division has earned high marks from local communities and state agencies for its professional criteria in resident selection, as well as its capacity to work with complicated compliance issues. Gorman & Company manages 52 apartment communities, 49 of which are affordable housing properties, totaling over 3,800 units. Controlling our management company within the Gorman & Company umbrella allows us to customize our tenant selection criteria to our specific target population while conforming to investor and Section 42 compliance regulations.

DEVELOPING MULTIFAMILY HOUSING FOR LOW-INCOME HOUSEHOLDS

Gorman & Company was formed in 1984 to develop high quality multi-family housing communities. We have developed some of the earliest Section 42 affordable housing communities at the onset of the LIHTC program, and these early developments remain highly-regarded and have stood the tests of time. Gorman & Company has assumed the role of working collaboratively with state and local governments, as well as non-profit organizations, on significant, complex revitalization efforts and we have become one of the most respected multifamily development firms in the state.

Gorman & Company's integrated functions, including development, architectural design, construction, and property management, allow us to "collaboratively" design and develop highly successful developments. All of the parties sit at the same table to program a development from concept through final execution, and we often engage our public and non-profit partners, as well as the surrounding community, in a design and planning process. Of the over 90 projects that Gorman & Company has completed over the past 30+ years, the company has never had a foreclosure, has never defaulted, has never had the general partner replaced by the investor.

OBTAINING AND UTILIZING FEDERAL, STATE, CITY AND OTHER FINANCING SOURCES

Gorman & Company has an extremely successful record in receiving 9% competitive LIHTC awards. In our 35 years in business, Gorman has been awarded tax credits from the Wisconsin Housing and Economic Development Authority (WHEDA) for over 30 affordable housing projects within the state. In addition to LIHTC, we have extensive experience financing projects with a multitude of sources, including: Tax Incremental Finance (TIF), HOME/CDBG Grants, WI Economic Development Corp (WEDC) grants, State LIHTC, and Federal Home Loan Bank Affordable Housing Program (AHP) funding, and City of Madison and Dane County Affordable Housing Funds. In the last 5 years alone (2016-2020), Gorman has received ten WHEDA 9% tax credit awards.

PARTICIPATING IN PUBLIC/PRIVATE JOINT VENTURES

For the past 35 years Gorman & Company has been a leader in partnering with communities and housing authorities across the country. Gorman has partnered with local Public Housing Authorities in six states (Arizona, Arkansas, Colorado, Florida, Illinois and Wisconsin) to redevelop housing authority properties and portfolios. We also work closely with municipalities, nonprofits, and neighborhoods to bring their visions and plans to reality. This development will be a true collaboration between Gorman and AgeBetter to achieve the goal of providing high quality affordable housing for seniors.

FINANCIAL CAPACITY

Gorman & Company and its team are nationally known for navigating innovative and complex financial structures. Gorman is an expert in securing funding sources including WHEDA 4% and 9% LIHTC, local and State HOME funds, CDBG funding, and grants from the Federal Home Loan Bank. In the last 5 years alone (2016-2020), Gorman has received ten WHEDA 9% tax credit awards. We have also been extremely successful in securing competitive financing from all of this experience is critical in ensuring that this development secures the gap financing and tax credits needed to move forward.

While Gorman & Company has earned a national reputation as an innovative developer, perhaps our greatest value in a partnership comes from our financial acumen, financial strength, and our unique access to the capital markets. Gorman & Company typically serves as the sole guarantor in all of our development partnerships. While we are open to different models and approaches, we are perfectly willing and able to offer our full guarantee for any project we undertake. Gorman & Company closely monitors its net worth and liquidity to ensure that we meet all financial performance benchmarks of our lenders and investors. Our financials have been reviewed and approved by nearly all of the largest lenders and investors across the United States, including, but not limited to, BMO Harris, US Bank, CitiBank, Associated Bank, and Chase Bank.

INTEGRATED SUPPORT HOUSING EXPERIENCE

Gorman & Company addresses Integrated Supportive Services in a variety of ways depending on the nature of the project. However, our basic approach starts with an appropriate design that includes adequate facilities for resident services, as well as properly trained property management staff who are essentially an extension and key element of any resident service program on that site.

A general property management and asset management method that we employ at all projects includes providing our resident referrals to service agencies that can help with their needs. Examples would be agencies providing assistance with financial assistance for rent and utilities if needed, information about agencies providing wellness programs, credit counseling, legal assistance, etc. We coordinate resident events to build community within our properties so that our residents feel that they know their neighbors, feel comfortable in their surroundings, and take ownership of the care of our property to make it a better place for everyone to live. Our property managers are trained in resident service coordination as a starting point. Gorman & Company also routinely partners with service providers in the community to address specific needs of residents and the community as a whole. Examples of Gorman & Company's previous special needs/supportive housing experience as Property Manager are noted below:

Carbon at Union Corners (Madison, WI) – Lutheran Social Services serves low-income veterans or families with veterans, who are at risk of homelessness and who require and request access to supportive services to maintain housing. Additional empowerment services include Employment Services, Financial Literacy, Adult Education, and Assistance with Benefits. Carbon opened in fall 2017 and referrals for the special needs units came from local organizations including the Veterans Hospital, Communication Action Coalition of SW WI, and YWCA. Carbon at Union Corners features (23) 30% AMI supporting housing units. In 2018, all 23 of the occupants are either veterans or have a disability.

Jane Addams Park Apartments (Rockford, IL) – Jane Addams Park Apartments is set-aside for the physically and/or mentally-disabled residents. As part of our partnership with the Rockford Housing Authority, a part-time Supportive Services Coordinator is available on-site and works with a variety of local service providers to meet the needs of the physically and/or mentally-disabled as well as public housing residents in general. Services include: Employment Services (T.E.A.M. Tuesday that provides information on employment, resume development, interview preparation, access to on-line employment); Life Skills Workshops; on-site G.E.D., pre G.E.D. and E.S.L. Classes; basic computer classes; assistance with LIHEAP applications; resident activities/trips; health clinics; community mental

health services. RAMP, Janet Wattles, and the Rockford Health Department all provide on-site services for qualifying residents.

The Grove at Keith Creek (Rockford, IL) - The development includes a variety of tenant services including health, mentorship for young adults, and nutrition classes. There are on-site referral services for physically and mentally disabled residents. Referral services are provided by the United Way of Rockford.

Villard Square GrandFamily Housing (Milwaukee, WI) - Villard Square GrandFamily Milwaukee is a project targeted toward providing housing for grandparents raising grandchildren. Gorman worked with Jewish Family Services to provide an on-site service coordinator who links residents with local, state and federal services; helps navigate the healthcare system, and advocates for the school children. Other services include tutoring and parenting classes.

Lofts at McKinley (Phoenix, AZ) – The Lofts at McKinley is a 60-unit LEED Platinum senior housing development near downtown Phoenix and the Valley Metro light rail system that offers a variety of services to its senior and disabled residents. Gorman has partnered with Arizona Bridge to Independent Living (ABIL), now known as Ability360, to provide job placement, welfare to work, and financial literacy services to McKinley residents with any type of permanent disability.

Escobedo at Verde Vista I & II – Gorman partnered with Save the Family Foundation to provide the following services at Escobedo: Workforce Development; “Job Club” workshops; skills assessments; vocational/job training opportunities; access to the Career Development Center; financial literacy training; Housing Survival Skills; Before and afterschool drop-in program; childcare; tuition assistance; and a Community Youth Advocate. Once a segregated, boarded-up public housing development that was originally built in 1943, this 132 unit development contains 30 units for chronically homeless families and 28 units for the Seriously Mentally Ill.

Gracie’s Village – Gorman has partnered with Grace Community Church of the Valley on the mixed-use Gracie’s development with includes a workforce development program through a thrift store operated by the Church on the first floor of the development. A comprehensive service plan has been assembled to expand upon the amazing services already offered at the current thrift store site. These services will include an on-site before and after school program, parenting classes, computer training, job training and placement services, and financial education to name a few. In addition to direct services provided by the church, Grace Community (Gorman’s partner on Gracie’s) has tapped into a vast network of social venture partners to deliver a vast array of supplemental services. 100% of the units are accessible to the physically disabled.

Terraza del Sol (Denver, CO) - The first floor of this development is occupied by Mi Casa. Founded in 1976, Mi Casa is among the oldest and largest Latino-serving nonprofit organizations in the state. With the mission to advance the economic success of Latino families, Mi Casa is a comprehensive resource center for low-income families, offering a variety of services to empower families to achieve their goals of economic independence. Mi Casa’s overarching goal is to increase the education, employability, knowledge and life skills of those served, empowering them to trade poverty for lasting economic stability and to flourish for generations. Mi Casa believes that when members of a family have realistic opportunities to pursue professional, educational and entrepreneurial advancement - within a culturally responsive and supportive environment - the cycle of poverty will be broken.

ARCHITECTURAL/SERVICE AWARDS OR GREEN BUILDING CERTIFICATIONS

Projects designed by Gorman & Company have won many awards and have attained the highest standards of sustainable/green design and accessible design. Gorman & Company's portfolio includes numerous developments certified by Wisconsin Green Built Home, Enterprise Green Communities, National Green Building Standard, and LEED. Examples include Fifth Street School Apartments (Milwaukee), Carbon at Union Corners (Madison), Washington Park Townhomes (Milwaukee), and Washington School Apartments, The Grove at Keith Creek (Rockford, IL), Paradise Point Senior Housing (Florida), and The Lofts at McKinley (Arizona).

In the past few years, Gorman's developments have been nominated or awarded in *Affordable Housing Finance's* annual Top Developers and Reader's Choice Awards, including Washington Park Townhomes (Milwaukee, WI), Villard Square (Milwaukee, WI), The Grove at Keith Creek (Rockford, IL), and Madison Heights (Avondale, AZ).

DEVELOPMENT TEAM: GORMAN & COMPANY

EDWARD (TED) MATKOM – WISCONSIN MARKET PRESIDENT

Ted Matkom has held the role of Wisconsin Market President over the past ten years with Gorman & Company and has also served as General Counsel. Ted has a wealth of experience in developing both residential and commercial real estate developments. Ted served five years on the board of directors



for Menomonee Valley Partners, the non-profit development entity designated to revitalize Milwaukee's Menomonee Valley industrial park. Ted has been President of The Corridor, Inc., a nonprofit organization that has been charged with helping to redevelop the "30th Street Corridor" in the heart of Milwaukee for the past seven years. He has also been appointed for the past five years to the Board of Directors for the Milwaukee Area Workforce Investment Board, Inc. Ted has a Bachelor of Arts in International Relations and Political Science from the University of Wisconsin-Madison, and a Doctorate of Law from Marquette University.

During his time with Gorman Ted has directly developed over 1,300 apartments totaling more than \$200M. In addition, Ted Matkom has secured more competitive low income housing tax credits in the State of Wisconsin than any other developer over the past seven years. As the Wisconsin Market President Ted leads a full team that includes development, design, construction, property management and asset management. He is responsible to a project from inception through the full compliance period. Ted's experience has led to him becoming an expert in engaging the community as a stakeholder in developments.

BRIAN SWANTON – PRESIDENT/CEO

Brian Swanton serves as President and Chief Executive Officer for Gorman & Company, having previously served as Gorman & Company's Arizona Market President. During his tenure as Arizona

Market President, Mr. Swanton led a multi-disciplinary team that developed, designed and constructed RAD redevelopments for both the Maricopa County Housing Authority and the City of Phoenix. Prior to joining Gorman, Mr. Swanton held various leadership positions in the non-profit sector, where he directed the preservation and construction of over 2,300 units of housing in 29 residential communities across Arizona and successfully refinanced and/or repositioned 1,702 units of existing affordable housing. Mr. Swanton also spent eight years of his career in the public sector, having served as the Housing Development Manager for the City of Scottsdale, as well as other positions in housing and community development with the City of Glendale, AZ, the Arizona Department of Housing, and the City of Quincy, MA. Mr. Swanton holds a Master of Public Administration and a Bachelor of Science in Urban Planning, both from Arizona State University where he has taught graduate and undergraduate courses in housing finance and neighborhood revitalization.

LUIS HERRERA – DEVELOPMENT COORDINATOR

Luis Herrera serves as Development Coordinator for Gorman & Company in the Arizona Market. Previous to his employment with Gorman & Company, Luis worked for a state senate campaign in Brookfield, Wisconsin. Luis received a BA in Business Administration with a major in Commercial Real Estate from Marquette University.

DUANE BUSCHER – FINANCIAL ANALYST

Duane Buscher serves as Financial Analyst for Gorman & Company, focusing primarily on underwriting Low-Income Housing Tax Credit projects. Mr. Buscher works closely with the Market Presidents and Construction Accounting team at all stages of the development process to evaluate project feasibility and conduct proforma analysis. Mr. Buscher joined the team at Gorman & Company in September 2014, having most recently worked in a similar role as an Underwriter for the Missouri Housing Development Commission. Mr. Buscher has a BA in Psychology and a Master's Degree in Urban Planning from the University of Kansas.

RON SWIGGUM – DIRECTOR OF CONSTRUCTION

Ron has over 20 years of experience in project management, encompassing cross-functional projects, price/cost management, budgetary and competitive estimating, coordination of design professionals, space planning, life cycle costing, contract administration, development and training of personnel, strategic business planning, risk management, proformas, staff leadership, P&L oversight, and customer relations. Ron recently directed construction for the largest "Green Communities" Public Housing Authority development to date east of the Mississippi River and is currently overseeing construction GC for an innovative "workforce housing" development in Monroe County, Florida (Florida Keys).

DEVELOPMENT TEAM: AGE BETTER, INC.

AgeBetter, Inc. is a 501(c)(3) organization whose members are two well-established nonprofit retirement communities in Dane County, Wisconsin: *Attic Angel Association* and *Oakwood Village*. In 2005, AgeBetter launched the Sharing Active Independent Lives (SAIL) program. SAIL is a non-profit membership organization located in Madison, Wisconsin. As part of the nationwide Village Movement, SAIL celebrates independence and stewardship in older adults, creating a community of learning, activity, socialization, and support for one another. In addition to SAIL, AgeBetter's major initiatives include affordable housing for seniors, community-based garden program, training and education for people working with older adults.

ANN ALBERT – EXECUTIVE DIRECTOR, AGE BETTER

Since 2005, Ann Albert has served as Executive Director of AgeBetter, Inc. Ms. Albert is responsible for direction and leadership toward achieving AgeBetter's mission and its strategic goals and objectives, as well as overall leadership of the organization's administration, staff development and engagement, program implementation, financial management and fundraising coordination, and the establishment of collaborative relationships with external organizations. Ms. Albert's previous experience includes consulting work related to program planning for Madison Area Continuing Care Consortium (a/k/a AgeBetter), as well as Assisted Living Administrator at Oakwood Lutheran Homes Association. Ann Albert has a BS and MS in Rehabilitation Psychology from University of Wisconsin-Madison.

REBECCA ROGERS – MEMBERSHIP SERVICES ASSISTANT, SHARING ACTIVE INDEPENDENT LIVES (SAIL)

Rebecca Rogers provides administrative and technical support to the SAIL team, including data management and assistance in providing basic home technology. Previous to her employment with SAIL, Ms. Rogers was a Recreation Specialist at Charities Adult Day Center as well as Program Services Director at Coventry Village in Madison, WI. Rebecca holds a B.A. in Business from Upper Iowa University.

PEGGY YORK – VOLUNTEER COORDINATOR, SAIL

Peggy York joined SAIL in 2011 and has held various positions over the past 8 years. In her current role, Ms. York recruits, orients, and connects volunteers to assist SAIL members and staff, coordinates social events as well as assists with other SAIL programs and activities. Previous to SAIL, Ms. York was employed by the State of Wisconsin and University Hospital and Clinics. Peggy York graduated from Edgewood High School and MATC's Practical Nursing Program.

NICOLE SHAEFER – PROGRAM DIRECTOR, SAIL

Nicole Shaefer provides leadership to the daily operations of SAIL, including member services, events and programs, and volunteer program and staff. Prior to her role at SAIL, Ms. Shaefer worked in program and volunteer coordination and management in Chicago and Wilmette, IL. Nicole Shaefer has a B.A. in Psychology from Saint Louis University and a Masters in Organizational Leadership.

PROPERTY MANAGEMENT

Gorman & Company's Property Management division was created in 1991. The property management division has earned high marks from local communities and state agencies for its professional criteria in resident selection, as well as its capacity to work with complicated compliance issues. In Wisconsin alone, Gorman manages over 30 LIHTC properties encompassing over 2,400 units. Controlling our management company within the Gorman & Company umbrella allows us to customize our tenant selection criteria to our specific target population while conforming to investor and Section 42 compliance regulations. The philosophy of the management division is to create an environment where regional managers are accountable for the operations of their portfolio, and property managers are expected to operate their property as a small business within authorized budgets and guidelines. It is particularly valuable to have our property management team involved in development of a property from the very beginning. They offer insight on design and programming which helps to ensure the development operates efficiently for the long-term.

LAURA NARDUZZI - VICE PRESIDENT OF OPERATIONS

Laura received her degree in Hotel and Restaurant Management from the University of Wisconsin – Stout in 1989. She began her hotel career with The North Central Group, a hotel management and development company. She held various positions in her 20-year tenure with that company including the Vice President of Operations. In that role, she was responsible for a \$90 million highly reputable hotel portfolio of Hilton and Marriott brands, which received several brand awards. She joined Gorman & Company in 2009 and now is the Director of Property Management.

Laura directly oversees the operations of Gorman & Company's management division as well as supervises several corporate functions including Human Resources, Facilities, Marketing, Training and Compliance. She works closely with the third party management companies insuring Gorman & Company's standards are synonymous across all markets. Laura works closely with Development, Design and Construction in the development process to insure strong viability and long-term sustainability

DAN CLARK - DIRECTOR OF PROPERTY MANAGEMENT

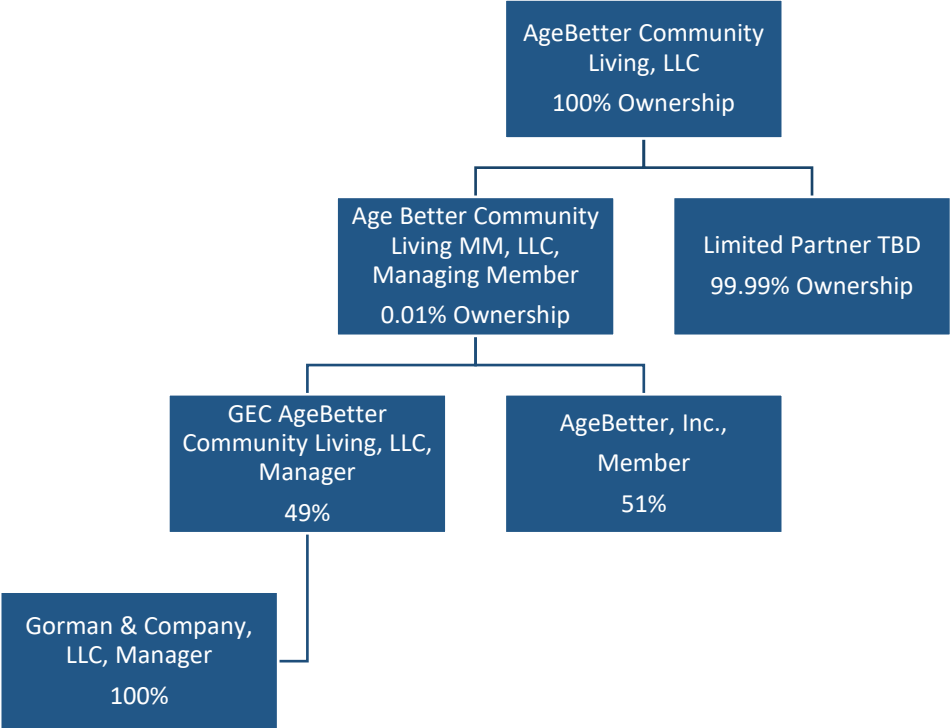
Dan Clark is responsible for Gorman & Company's management division. His primary focuses is on meeting operational objectives to drive positive business results of multifamily and commercial real estate within the company's portfolio. In his role, working with external and internal partners, his responsibilities include multi-state oversight of in-house and third party management companies, financial/ capital planning, and market strategies. Mr. Clark joined Gorman & Company in 2017, previously serving as Senior Regional Portfolio Manager at The ConAm Group of Companies where he was responsible for Southern California's regional operations and investment performance of affordable and market-rate housing developments. He brings over 25 years of real estate asset management, property management and facilities management experience on high density, mixed use and urban infill projects.

MANAGEMENT EXPERIENCE

WISCONSIN PROPERTIES OWNED & MANAGED BY GORMAN & COMPANY

GORMAN & COMPANY - MANAGED PROJECT LIST				
WISCONSIN				
	Location			
Project Name	City	Completion Date	# Units	# LI Units
Candise Street Lofts / Riverside Lofts	Jefferson	2020	36	36
Main Street Apartments / Eleven41 Main	Sun Prairie	2020	64	55
Union Corners Grandfamily / Generations at UC	Madison	2020	59	56
Milwaukee Scattered Site #1	Milwaukee	2018	50	50
Carbon at Union Corners	Madison	2017	90	76
The Alexander Lofts / Mitchell Library	Milwaukee	2017	60	0
Roosevelt School Apartments	La Crosse	2017	33	33
Washington School Apartments	Sheboygan	2017	42	35
Washington Park Townhomes	Milwaukee	2018	40	40
Fifth Street School	Milwaukee	2018	48	44
Bishop O'Connor / Holy Name Heights	Madison	2016	53	0
Century City Homeowners Initiative	Milwaukee	2016	40	40
Sherman Park Homeowners Initiative	Milwaukee	2015	40	40
Washington Park Homeowners Initiative	Milwaukee	2014	42	42
Northside Neighborhood Initiative 2	Milwaukee	2013	60	60
Northside Homeowners Initiative 2	Milwaukee	2013	30	30
Northside Neighborhood Initiative	Milwaukee	2013	40	40
Northside Homeowners Initiative	Milwaukee	2012	40	40
Sherman Park Commons	Milwaukee	2012	68	68
Grand River Station	La Crosse	2010	72	59
Villard Square Grandfamily	Milwaukee	2011	47	47
Kannenberg Plaza	Wausau	2011	106	106
Rolling Prairie - Resyndication	Sun Prairie	2010	84	84
Blue Ribbon Lofts	Milwaukee	2008	95	69
Fairbanks Flats	Beloit	2009	16	13
Metcalfe Park Homeowner Initiative	Milwaukee	2008	30	30
Windsor Court	Milwaukee	2008	239	239
Gund Brewery Lofts	La Crosse	2007	86	68
The Harbor at State and Main	Racine	2007	84	66
Avalon Madison Village	Madison	2006	104	72
Dr. Wesley L. Scott Senior Living Community	Milwaukee	2006	80	74
Park East Enterprise Lofts	Milwaukee	2006	85	68
Historic Lofts on Kilbourn	Milwaukee	2005	99	79
Kenosha Commons	Kenosha	2004	48	48
Kenosha Commons II	Kenosha	2004	56	0
Knitting Factory Apartments	Milwaukee	2003	100	100
Forest Ridge	Baraboo	2001	56	0
Prentice Park	Madison	1994	40	40
Prentice Park II & III	Madison	1994	122	122
Rolling Prairie I	Sun Prairie	1990	54	54
Rolling Prairie II	Sun Prairie	1990	30	30
Buckhorn Station Apartments	Cudahy	2000	64	64
Fitchburg Springs	Madison	1996	104	104
Garton Toy Factory	Sheboygan	2000	72	52
Quisling Terrace	Madison	2000	60	46
Riverwalk Apartments	Sheboygan	1997	40	40
Riverwalk Apartments II	Sheboygan	1999	20	20
Total- 47 Sites			3028	2579

PROPOSED PROJECT ORGANIZATIONAL CHART





Section 3 - Supportive Services Letters

Enclosed in this section you will find the letters of support from Life Assist, New Bridge, and RSVP that were written last year. We will have updated letters from all three of these organizations for the city to review in the near future.



6/27/2019

Ann Albert
AgeBetter, Inc.
6209 Mineral Point Rd, #210
Madison, WI 53703

RE: Proposed Affordable Senior Housing Development
8522 Elderberry Rd, Madison

Dear Ann,

As President of Life Assist USA, I am excited to hear about your proposed affordable housing development for seniors on the west side of Madison. Through our work with the senior community, we understand the strong and growing need for affordable senior housing in the Madison area.

Life Assist USA is a local and family owned company providing personal emergency response services to over 10,000 people, mostly older adults, living in local communities and throughout the country. We have worked collaboratively with the SAIL—Sharing Active Independent Lives program for five years offering services at significantly reduced fees to its members.

We are interested in working with AgeBetter to provide our services to resident seniors in the proposed development at a discounted rate making the service affordable to those with low incomes. Specifically, this would include discounts on installation and our most popular land line and cellular based systems.

Please keep us advised as your project moves forward and let us know anything we can help with to make this project a success.

Sincerely,

A handwritten signature in black ink, appearing to read "Michael Y. Larson". The signature is fluid and cursive, with a long horizontal stroke at the end.

Mike Larson



Friday, June 21, 2019

Ann Albert
AgeBetter, Inc.
6209 Mineral Point Rd. #210
Madison, WI 53703

RE: Proposed Affordable Senior Housing Development
8522 Elderberry Rd, Madison

Dear Ann,

As the Executive Director for NewBridge Madison, I am excited to hear about your proposed affordable housing development for older adults on the west side of Madison.

NewBridge Madison, Inc. is a nonprofit organization that started in 2019 after the four Madison Senior Coalitions merged in 2019. While a new organization, it has a long history of over 40 years of service. To ensure longer, safer and healthier independent lives, NewBridge provides a variety of services for older adults at no or low cost, which include: Case Management, Nutrition program, Home Chore volunteer program, Guardian and Representative Payee volunteer program, Cultural Diversity program, and social and educational activities.

We are interested in partnering with AgeBetter to provide our services to resident older adults in the proposed development. Specifically, this would include

- Case Management services for residents 60 years and older who are income eligible.
- Transportation from the housing development to the closest nutrition site for a donation price.
- Home Chore volunteers for residents who are Case Management clients and who are income eligible.
- Site for social and education activities.

We also look forward to increasing connections of older adults we work with through NewBridge with AgeBetter housing and SAIL-Sharing Active Independent Lives programs and services, thus expanding the resources that help older adults live safely and independently in our community.

Sincerely,

 MAIN OFFICE
South Madison
128 E. Olin Ave #110
Madison, WI 53713

North Madison
1625 Northport Dr #125
Madison, WI 53704

East Madison/Monona
4142 Monona Dr
Madison, WI 53716

West Madison
5724 Raymond Rd.
Madison, WI 53711



...where volunteers make a difference

June 21, 2019

Ann Albert, Executive Director
AgeBetter, Inc.
6209 Mineral Point Rd, #210
Madison, WI 53703

RE: Proposed Affordable Senior Housing Development
8522 Elderberry Rd, Madison

Dear Ann:

As Executive Director of RSVP of Dane County, I am excited to hear about your proposed affordable housing development for seniors on the west side of Madison. Through our daily work with the senior community, we understand the strong and growing need for affordable senior housing in the Madison area.

RSVP (Retired and Senior Volunteer Program) is a nonprofit organization that recruits adults age 55 and older for meaningful volunteer assignments in the community. RSVP's Driver Services/Vets Helping Vets program which provides transportation and delivers meals, helps seniors remain independent and able to age in place.

We are interested in partnering with AgeBetter to provide our services to resident seniors in the proposed development. Specifically, this would include volunteer opportunities in the community, rides to medical appointments, and continued collaboration in the Triad Crime Prevention and Safety Program which includes educational sessions plus car winterization that would benefit residents at the new Elderberry housing. We are excited about the opportunity to expand our partnership with AgeBetter and support the proposed Elderberry Senior Housing Development.

Sincerely,

A handwritten signature in cursive script that reads "Margie Zutter".

Margie Zutter
Executive Director

Support

Log In



- Home
- About Us
- 15th Anniversary
- COVID Resources
- News & Events
- Membership
- Blog
- Contact Us

Who We Are

SAIL (Sharing Active Independent Lives) supports the independence of the growing senior population through activities, education, socialization, and providing of essential services.



Print T
Text Si
Scroll T

Watch a video about us!

Tip: to scroll directly to a topic below, click on one of the following buttons.

- History
- Staff
- Leadership
- Village Movement
- FAQs

SAIL Overview

Sharing Active Independent Lives (SAIL) began as a vision in 2004 and has evolved into a thriving membership organization designed to support the health and well-being of people as they age.

SAIL is a non-profit program of AgeBetter Inc., in collaboration with Attic Angel Association and Oakwood Village.



SAIL's History

The vision for SAIL began taking shape in September 2002, when the Madison Area Continuing Care Consortium, Inc. (MACCC), now named AgeBetter, Inc., sponsored a public forum in Dane County, Wisconsin, to

explore the growing population of people over 60 years of age and the resources needed to uphold the quality of life for them.



[Read More SAIL History](#)

SAIL Staff

An Executive Director, Membership Services team, and Marketing team oversee SAIL's day-to-day activities. The staff is supported by a wonderful volunteer base, most of whom are SAIL members.



Ann Albert, AgeBetter Executive Director

Ann began working with SAIL's founding organization, AgeBetter, Inc., as a consultant in early 2004 when SAIL was being launched as a Naturally Occurring Retirement Community demonstration project. Several years prior, she was an assisted living administrator at Oakwood Village. This experience, along with her master's degree in rehabilitation psychology from UW-Madison, helped her immensely in the formation and success of SAIL. She has shaped the program into a unique and sustainable community resource for older adults that also takes a leadership role in the national "village movement." In addition to oversight of SAIL, she is spearheading initiatives related to senior affordable housing, training

and education for people working with older adults, a locally grown produce and community-based garden program, and more. Contact Ann at ann@agebettertoday.org,



Nicole Schaefer, Program Director

Nicole manages program operations relating to member services - direct services provided by staff as well as those coordinated by staff and performed by vetted volunteers and service providers. She also oversees and supports SAIL programs and event offerings, marketing and communication outreach, and individual member consultations. Her educational background includes a bachelor's in psychology and special education and a master's degree in organizational leadership. Contact Nicole at nicole@sailtoday.org



Peggy York, Volunteer Coordinator

Peggy supports more than 100 SAIL volunteers while also orienting new volunteers, welcoming new members, matching volunteers with individual member service requests, supporting the call center, and helping with events. Before joining SAIL, Peggy worked as a licensed practical nurse and administrative assistant, retiring from UW Hospital & Clinics in 2011. Contact Peggy at peggy@sailtoday.org



Photo coming soon

Sarah Kruse, Communications Assistant

With expertise in communications, higher education, and senior care, Sarah supports the marketing, public relations, and member communications functions of SAIL. She assists with *The Messenger* (monthly newsletter), weekly email messages, the website, collateral materials, and press releases to increase the overall awareness of SAIL. She holds a degree in English and education. Contact Sarah at sarah@sailtoday.org.



Becky Rogers, Membership Services Assistant

Becky provides customer support to members and others contacting SAIL while also offering administrative and technical support to the SAIL team. She brings experience as a certified occupational therapy assistant and provider of direct care services in assisted living, independent living, and adult day programming. Contact Becky at becky@sailtoday.org.

Leadership



The SAIL Council

Christine Beatty, Dorit Bergen (President), Beth Campbell, Mary Ann Drescher (AgeBetter, Inc.), Sue Goldstein (Vice President), Ernie Hanson, Don Haasl (Secretary), Dianne Hopkins, Chris Klotz, Kathleen Larson, Alan Lukazewski, and Rick Sheridan.

SAIL Governance

SAIL is a non-profit program of AgeBetter Inc., in collaboration with Attic Angel Association and Oakwood Village. Both are local non-profit retirement communities.

The AgeBetter Board of Directors includes: Reginald Hislop III (CEO, Oakwood Village), Mary Ann Drescher (Attic Angel President), Barbara Gessner, Heidi Lauhon, Ruth Marion, and Kristen Peterson.

SAIL Council

A SAIL Council was created by AgeBetter in 2010 to oversee the day-to-day operations of SAIL and assist in membership development. Council members include: Christine Beatty, Dorit Bergen (President), Beth Campbell, Mary Ann Drescher (AgeBetter), Sue Goldstein (Vice President), Ernie Hanson, Don Haasl (Secretary), Dianne Hopkins, Chris Klotz, Kathleen Larson, Alan Lukazewski, and Rick Sheridan.

Meetings and Documents

About the Village Movement

Freedom and Control


The Village Movement is a nationwide, grassroots effort for older adults to nurture independence, engagement, and comfort. The model focuses on groups of older adults helping one another through volunteerism, education, and social opportunities, and being there to provide support if and when the need arises.

Today, there are over 250 Villages nationwide, including SAIL. The organization's network of staff, volunteers and members adhere to the ideals of the Village Model, working hard to make sure older adults feel supported in whatever way they need as they maintain independent, vibrant lives.



The first Village, called Beacon Hill, was created in 1999 in Boston, MA. They describe their inception by saying:



We looked beyond conventional solutions. We wanted more freedom and control than we found in models that focus on single issues, such as housing, medical care, or social activities. We wanted to be active, taking care of ourselves and each other rather than being "taken care of." 



Village to Village Network

Join SAIL



SAIL's Frequently Asked Questions

General Questions

What makes SAIL different from other programs already available in the community?

SAIL is the only program of its kind in our area. Our focus is on independence and helping older adults continue to thrive through involvement, interactions, and learning. Members not only draw from services, they have a key role in the governance of SAIL as well as its day-to-day operations. Most importantly, members support one another, rather than relying entirely on support from us.

What kinds of services does SAIL offer?

SAIL provides numerous services including access to pre-screened service providers, educational events, transportation, medication reviews, volunteer opportunities, social events, and so much more! For a complete list of what is offered at each membership level, please visit the "Membership" page of our website.

Do you work with other agencies that provide similar services?

SAIL works with several community organizations to the fullest extent possible. We are constantly identifying unmet needs and finding ways to meet them. Some of the organizations we work closely with are; West Madison Senior Coalition, Monona Senior Center, Dane County Health and Human Services, Safe Communities, and more!

Where is SAIL located?

SAIL's office is located at the Oakwood Village University Woods campus. We serve individuals all throughout Dane County.

How does SAIL decide what services to offer?

SAIL members take an active role in driving the program. SAIL has created four teams led by member volunteers: Finance, Marketing, Product, and Membership. A member Connections Group meets monthly to discuss program ideas and provide feedback to staff. We are very open to the input of our members, as they are our heartbeat and can best help us understand what is needed.

Membership

What does it cost to join SAIL?

A full SAIL membership has an annual fee of only \$395 per household. An Associate membership is also available for \$195. SAIL offers a sliding fee for those with a financial hardship.

How do I join SAIL?

Simply call the SAIL office at 608-230-4321, email us at info@sailtoday.org, or sign up through the "Join" tab on the website. Once you've signed up, we'll schedule a personal appointment to deliver your membership information. If you pay annually, should ever have to cancel your membership, you'll receive a refund of unused months.

Can I charge my membership?

Yes, we accept Visa, MasterCard, Discover, and American Express.

Volunteering

What types of volunteer opportunities does SAIL offer?

SAIL offers many volunteer opportunities including committee work, public relations, visitation/companionship, member transportation, office assistance, light handyman work, and more. Please visit the "Support" page of our website to learn more about volunteering.

How do I become a SAIL volunteer?

Call the SAIL office at 608-230-4321 and we'll provide an application form and a Background Information Disclosure form required of all volunteers. You can also download and send the paperwork via the "Support" page on our website. Once we receive and review your application, we'll contact you regarding next steps.

If I volunteer, do I have to commit to a certain number of hours or a regular schedule?

No, there is no minimum time requirement for SAIL volunteers. We encourage all volunteers to commit to the amount of time they feel they can successfully manage.

Service Providers

How do you develop your list of service providers?

We receive suggestions from members and others associated with SAIL. As an organization, we have many resources to call upon for referrals and we do a thorough screening and background check.

How are services arranged with SAIL service providers?

When you join SAIL, we provide you with your own directory of service providers. You may contact the service providers directly and identify yourself as a SAIL member or you can call SAIL and we'll be happy to call them for you.

What if I need a service and SAIL does not have a service provider listed who provides that service?

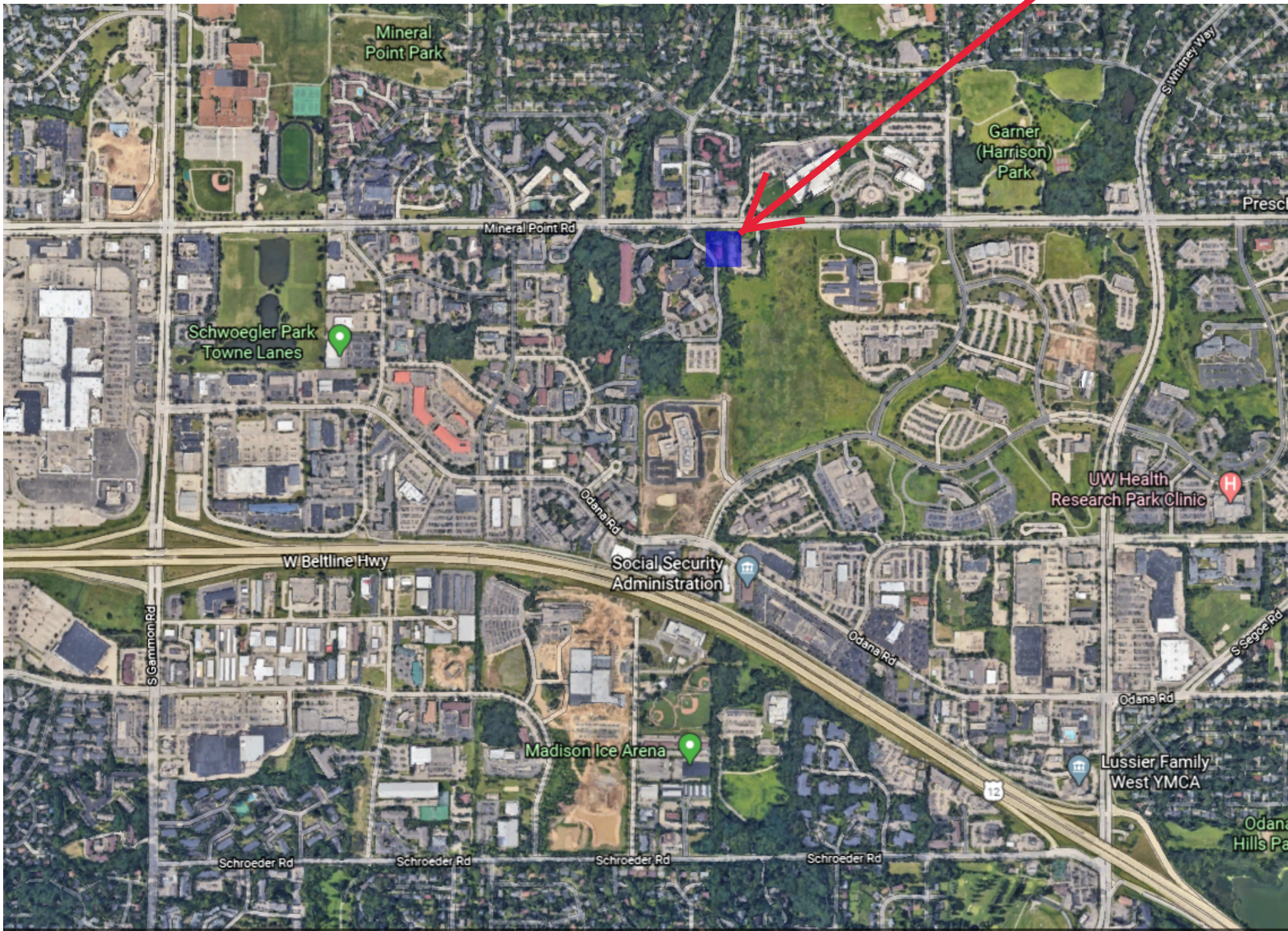
Because SAIL is sponsored by two local non-profit organizations, we have access to a variety of resources to help locate a recommended service provider for you to contact. Just give us a call at 608-230-4321 or e-mail info@sailtoday.org and we'll help you!

What if I have a problem with a service provider or the work that was done?

Call SAIL to discuss your concern. We will work on your behalf to ensure your satisfaction.

What if the service providers I use are not in the SAIL directory?

You can continue using your favorite service providers, but if they are not listed in our SAIL Member Services Directory, we will not be involved in background checks or consumer advocacy.



Mineral Point Park

Garner (Harrison) Park

Schwoegler Park Towne Lanes

UW Health Research Park Clinic

Social Security Administration

Madison Ice Arena

Lussier Family West YMCA

Odana Hills Pa

Mineral Point Rd

W Beltline Hwy

Schroeder Rd

Schroeder Rd

Schroeder Rd

Schroeder Rd

Odana Rd

Odana Rd

Odana Rd


S Gammon Rd

S Seago Rd

S Whitney Way

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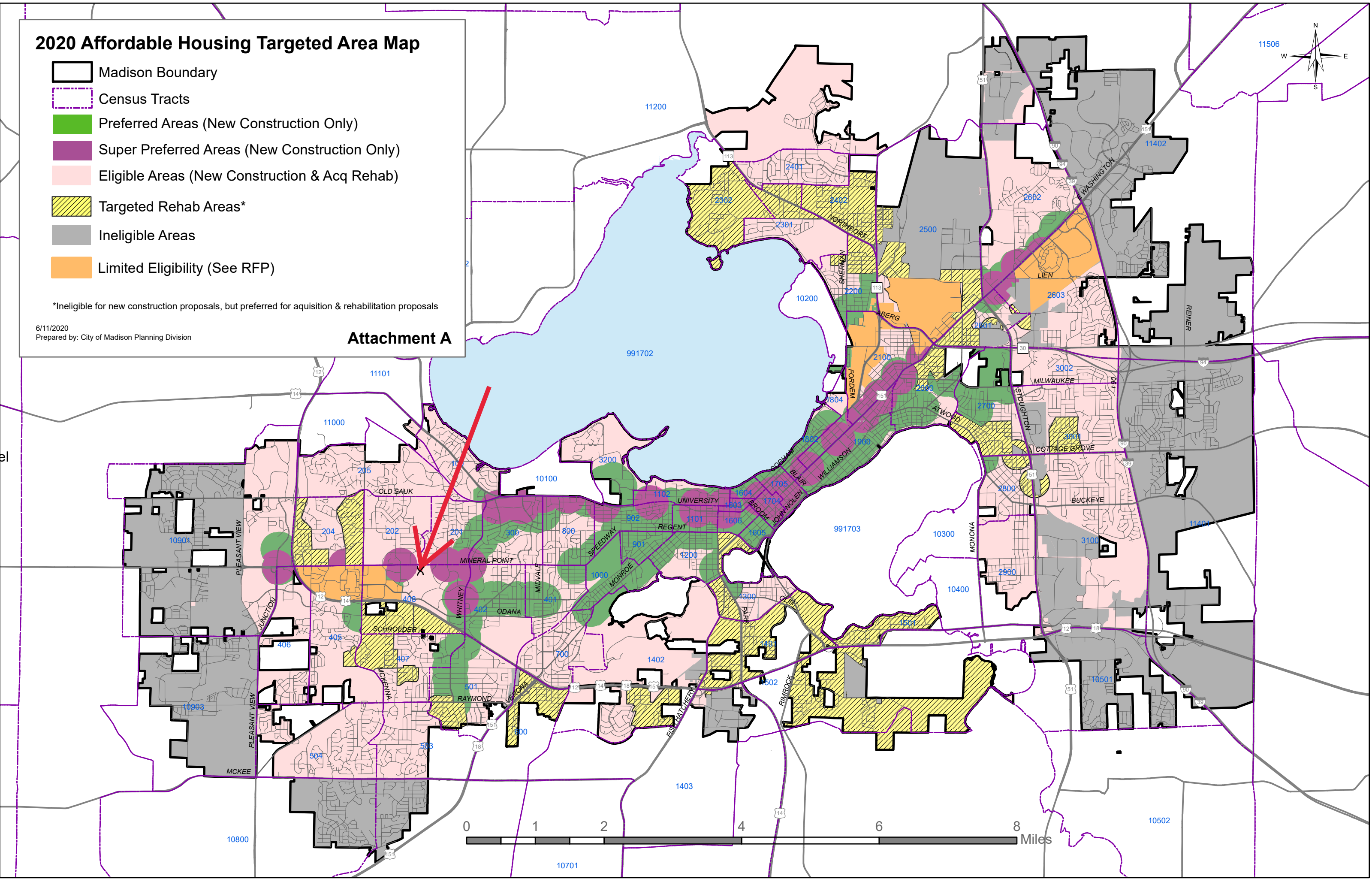
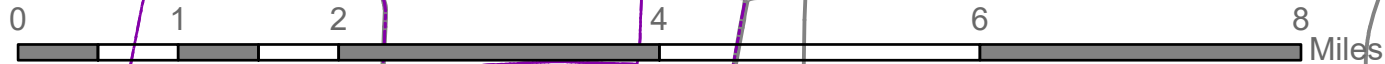
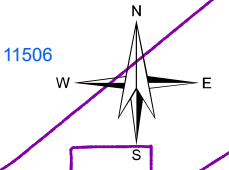
2020 Affordable Housing Targeted Area Map

-  Madison Boundary
-  Census Tracts
-  Preferred Areas (New Construction Only)
-  Super Preferred Areas (New Construction Only)
-  Eligible Areas (New Construction & Acq Rehab)
-  Targeted Rehab Areas*
-  Ineligible Areas
-  Limited Eligibility (See RFP)

*Ineligible for new construction proposals, but preferred for acquisition & rehabilitation proposals

6/11/2020
Prepared by: City of Madison Planning Division

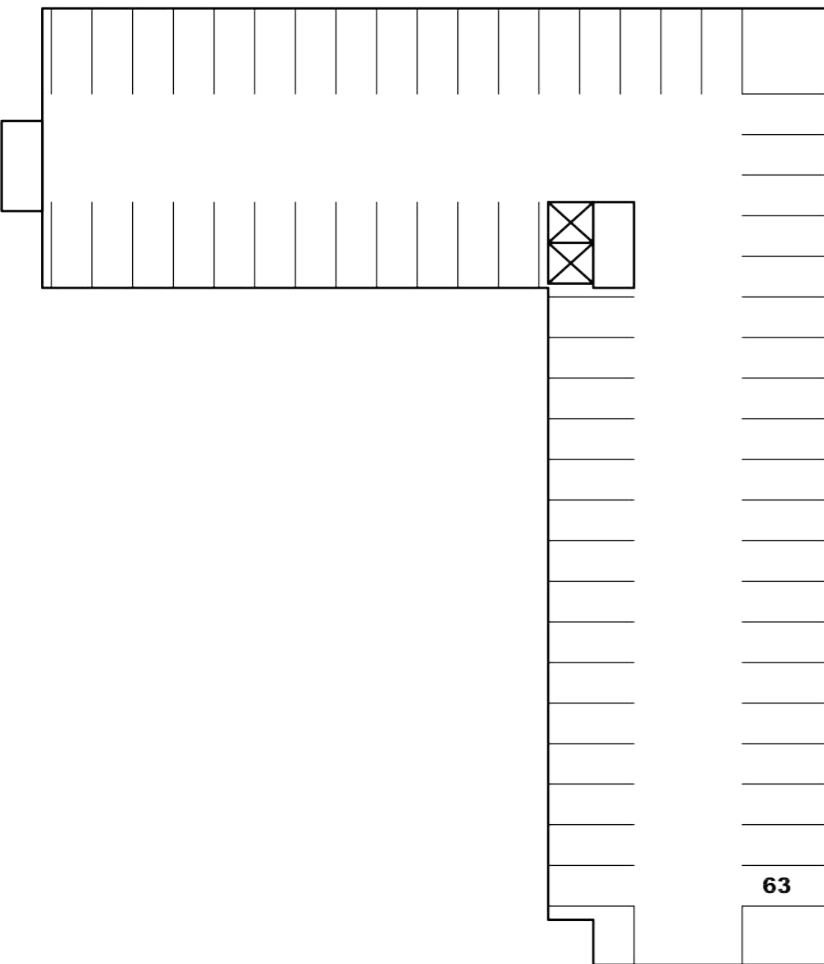
Attachment A



6145 MINERAL POINT RD. MADISON WI.

OAKWOOD MINERAL POINT PROPERTY
CURRENT ZONING = PD

LAND IS PART OF A LARGER PARCEL AND IS BISECTED
BY A PRIVATE ROAD.

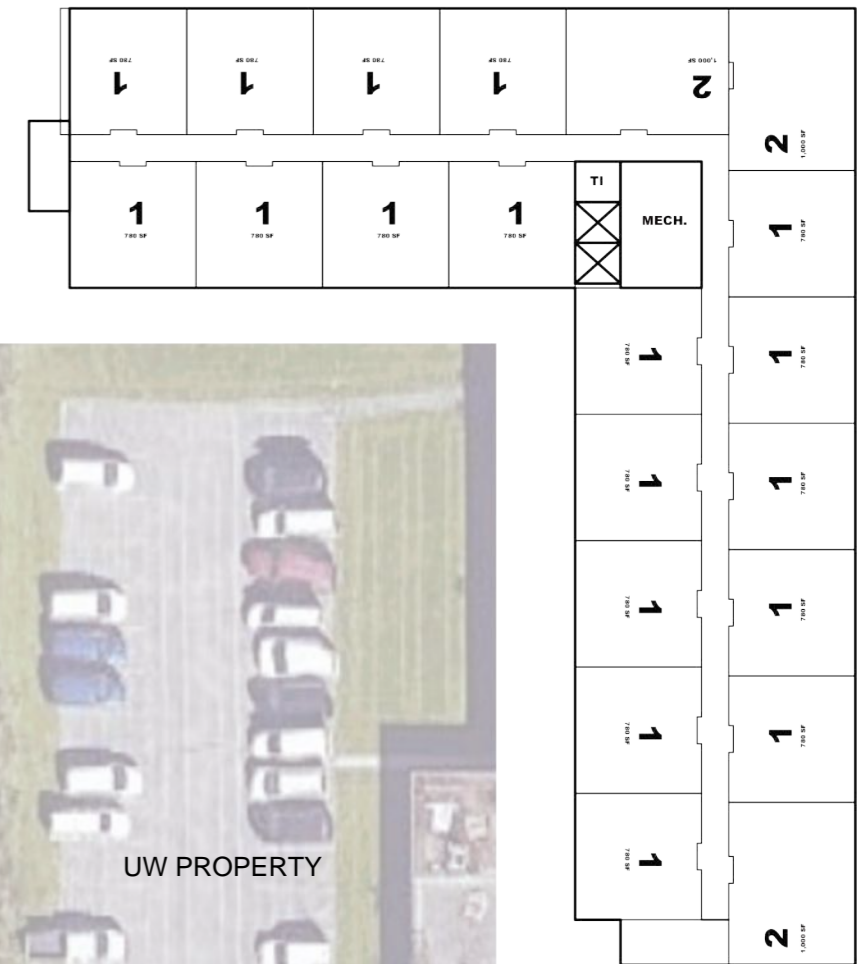


LOWER LEVEL



PROPOSED UNIT MIX

75 TOTAL UNITS AT 4 STORIES (OR 54 AT 3 STORIES)
63 1-BED UNITS
12 2-BED UNITS
78 PARKING PACES







UPPER LEVELS 2-4
TYPICAL




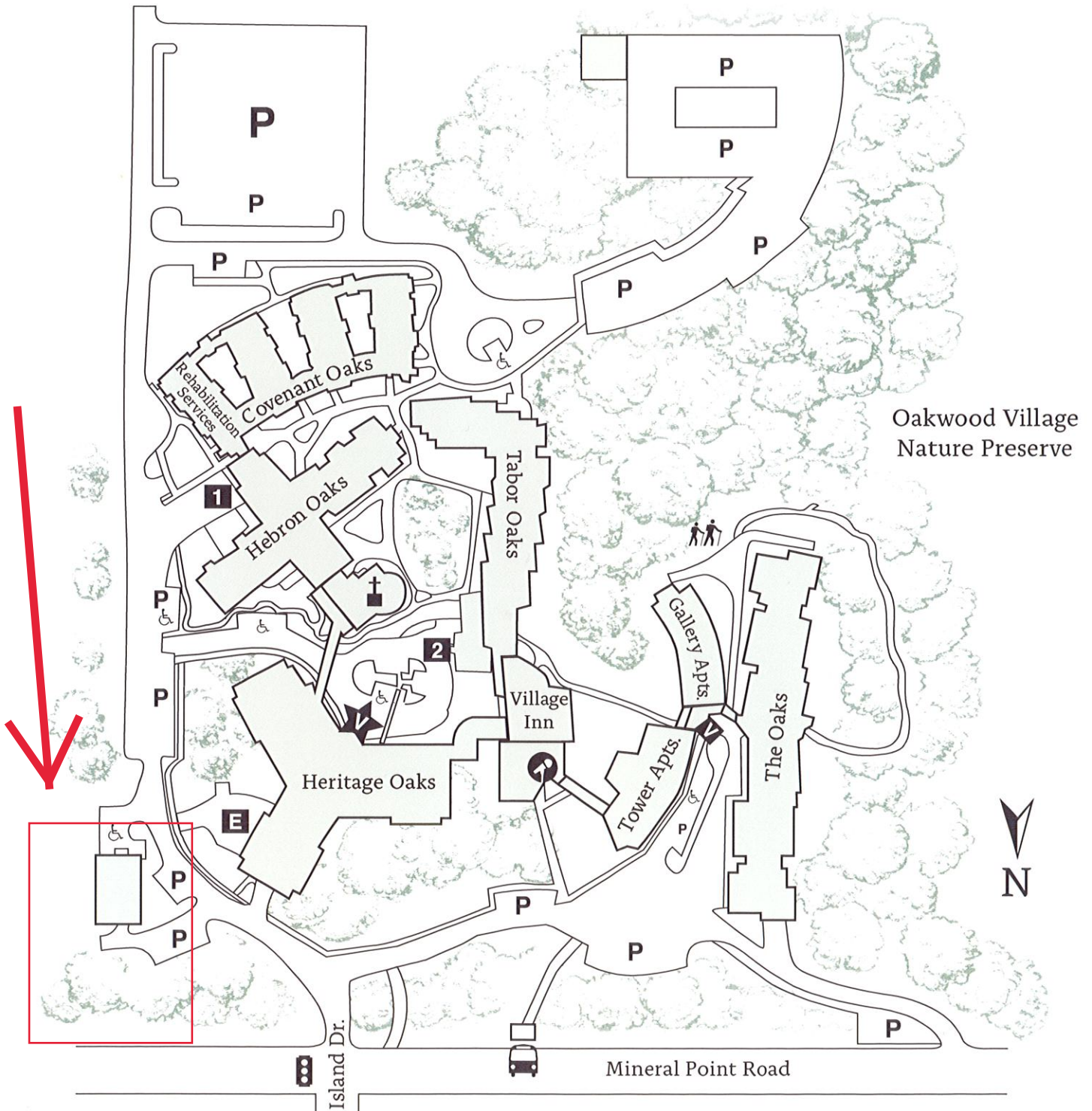
OAKWOOD VILLAGE

UNIVERSITY WOODS

(608) 230-4699 • www.oakwoodvillage.net

-  Center for Arts and Education
-  Bus Stop
- P** Parking
-  Handicap Parking
-  Public Entrance to Nature Preserve

-  Main Visitor Entrance
- 2** Loading Dock #2
- V** Visitor Entrance
-  Resurrection Chapel
- 1** Loading Dock #1
- E** Entrance to Underground Visitor Parking



From: cnc@twgi.com on behalf of [New Construction](#)
To: [Patrick Patrello](#); [Luis Herrera](#)
Subject: Welcome to New Construction (FOE-DEB6E-18163)
Date: Monday, July 13, 2020 2:51:36 PM

Thank You

A notification of this application has been submitted for further review.

Application Number: [FOE-DEB6E-18163](#)
Program: **New Construction**
Sponsor: **Focus on Energy**
Created By: **Patrick Patrello on 7/13/2020 2:51:28 PM**
Project Name: **Age Better Community Living**
Project Location: **6203 Mineral Point
Madison, WI 53705**
Business Customer: **Gorman and Company LLC (land currently owned by Oakwood Village)**

Your unique application number is listed below. You can make additional modifications to this application at any time by clicking this number. Please distribute this email to other contacts as necessary so that they can fill out additional information on this application.

[FOE-DEB6E-18163](#)



Section 5 - Zoning Letter

We have reached out to Matthew Tucker at the Zoning Department via email and various voicemails. We are still awaiting response, and will share with the city once it is received. After analyzing the site we are confident that the site will require an amendment to the zoned PDD.

Additionally, In this section you will find an email that was sent to the Zoning Department regarding the site.

From: [Ted Matkom](#)
To: [Luis Herrera](#)
Subject: FW: AgeBetter Community Living - RFP
Date: Wednesday, July 15, 2020 10:34:38 AM
Attachments: [3.c Property Site Plan.pdf](#)

Sent from my U.S.Cellular© Smartphone

----- Original message -----

From: Ted Matkom <tmatkom@gormanusa.com>
Date: 7/14/20 10:48 AM (GMT-06:00)
To: "Tucker, Matthew" <MTucker@cityofmadison.com>
Subject: FW: AgeBetter Community Living - RFP

Matt

Sorry about the last minute request. Here is the site plan for our 75 unit senior apartment building on the Oakwood campus on the parcel addressed as 6165 Mineral Point Road. It would be 4 stories with 63 underground parking spaces and 15 surface parking spaces. I think we need a zoning letter confirming we need to get an amendment to the PDD for the AHF funding RFP or maybe an email would suffice. Thanks

Ted Matkom
Gorman & Company
414 617-9997

Sent from my U.S.Cellular© Smartphone



Application Question #36 Exhibit

In this section you will find an email that was sent to Alderman Keith Furman regarding the site.

From: [Ted Matkom](#)
To: [Luis Herrera](#)
Subject: FW: AgeBetter Community Living Site Plan on Oakwood Campus
Date: Wednesday, July 15, 2020 10:33:02 AM
Attachments: [3.c Property Site Plan.pdf](#)

Sent from my U.S.Cellular© Smartphone

----- Original message -----

From: Ted Matkom <tmatkom@gormanusa.com>
Date: 7/14/20 10:42 AM (GMT-06:00)
To: Keith Furman Alderman District 11 <district19@cityofmadison.com>
Subject: FW: AgeBetter Community Living Site Plan on Oakwood Campus

Alderman Furman

Ted Matkom here from Gorman & Company. I am contacting (also left you a message) informing you of our proposal to place a 75 unit four story senior apartment building on an parcel located on the Oakwood Village Campus which is located just east of the main entrance to the campus. We will be partnering with the non profit organization AgeBetter (created the SAIL program). I have attached a site plan for your review. Please contact me today if you have some time to discuss.

Ted Matkom
Gorman & Company
414 617 9997

Sent from my U.S.Cellular© Smartphone

Gorman & Company, LLC and AgeBetter, Inc.
AgeBetter Community Living

Response Submission Due Date: August 19, 2020 NOON

Instructions to Applicants:

Please respond *briefly and succinctly* to the questions below in-line, unless otherwise specified (e.g. additional documentation requested). Maximum 1/3 a page per question. Please use this Word document to record your answers and return this completed document to cddapplications@cityofmadison.com. Please cc: jspears@cityofmadison.com and etabakin@cityofmadison.com. We ask that you refrain from submitting additional documentation not specifically requested at this time or using alternative formats.

Questions:

Land Use and Community Engagement

- 1. Provide an overview of the feedback and comments that you received from your neighborhood meeting.**

Per the conversations with the city and at the community meeting, we were able to make the following revisions to the Oakwood Village Age Better project:

- The access drive to the basement level parking was moved to the south*
- Pedestrian access from Mineral Point Road to the building was provided from the public sidewalk to the northeast corner of the building*
 - A private resident entrance will be located into the lower level parking*
 - This location provides the resident quick access to outdoors from the elevator and works with the difficult topography, minimizing slopes/ramps for users.*
- Trash has been relocated to inside the building*
- Trees will be planted at the northwest corner of the site at the corner of Mineral Point Road and the Oakwood Village private drive. Landscaping along Mineral Point Road will also be provided but will not conflict with fire access to the building.*
- A pedestrian crosswalk will be provided from the Age Better facility across the private drive to the Oakwood Village facility, allowing residents safe access to the Oakwood Village campus.*

- 2. Describe the response of the alderperson to this proposal. What issues or concerns, with the project did s/he identify, if any? How will those be addressed?**

Alder Furman was on the neighborhood call and all of the above stated issues were discussed along with the general traffic safety concerns about the intersection of Island Drive and Mineral Point Road that were based on the timing of the lights at that intersection and the close proximity of our ingress/egress to underground parking which we have now moved to the south side (the opposite side) of the property.

Energy Efficiency

1. The City expects awarded applicants to continue working with Focus on Energy throughout the building design process. This begins with completing the Building Analysis Summary Report and providing an update as to the recommended strategies most likely to be fully implemented in this project ASAP/by approximately September 15, 2020. Please provide a progress report on the status of this project's FOE Energy Design Assistance Building Analysis. By what date would you anticipate that it would be feasible to provide the Energy Design Assistance staff team with the requested information needed to complete the Building Analysis Summary Report?

This Project was registered with Focus on Energy (FOE) on Monday, August 17th.

The AgeBetter team provided the Energy Design Assistance staff project information on 8/17 & 8/18.

The initial FOE consultation meeting was held with Energy Design Assistance staff on 8/18.

The Energy Design Assistance staff is currently creating meeting minutes & completing Building Analysis Summary Report

Renewable Energy

1. Please describe your Renewable Energy systems that will be incorporated into the proposed project (solar photovoltaics (PV), solar thermal, biogas, biomass and wind).

Solar photovoltaics will be incorporated onto the rooftop design of the project.

Energy efficient HVAC systems will be provided throughout.

LED lighting will be utilized throughout the exterior and interior of the building.

2. What is the status of application(s) to Focus on Energy's Renewable Energy team, MadiSUN, and/or other applicable agency providing incentives to implement renewable energy systems?

We filed our Focus on Energy online application for this project on August 17, 2021, delivered to FOE all plans to date that were submitted to UDC immediately after we filed our application and had our initial consultation and meeting regarding those filed plans on August 18, 2020.

Sustainable Building Design Elements

1. Please describe the Sustainable Building Design Elements and strategies that will be incorporated into the proposed project as referenced in the [AIA Framework for Design Excellence](#). Relevant elements and strategies include, but are not limited to:
 - a. Design for equitable communities
 - b. Optimize site potential
 - c. Optimize energy use

- d. **Protect and conserve water**
- e. **Optimize building space and material use**
- f. **Enhance indoor environmental quality (IEQ)**
- g. **Optimize operational and maintenance practices.**

- *The building will be designed for ease of access for the senior population accessing and living in the building. At grade entrances will be provided at the front door and to the topographically lower bus shelter along Mineral Point Road. This AgeBetter Community will be designed to provide a comfortable and safe place for all ages.*
- *An accommodation for temporary and long-term bicycle storage is being provided per the City of Madison regulations.*
- *The site is being maximized to provide living and amenity spaces, resident and staff/visitor parking and on-site rain water collection and infiltration. Native landscaping will be provided to enhance the AgeBetter project and the community.*
- *Sustainable elements in the project include solar photovoltaic panels, on-site rain water collection/infiltration, and green roof.*
- *The Design Team will work closely with Focus on Energy (FOE) to maximize energy efficiency and reduce energy and water use so as to reduce utility cost for residents*
- *Indoor environments will be enhanced with natural lighting and operable windows for ventilation. Individual unit controls allow the resident individual thermal comfort. Unit partitions will be constructed to minimize sounds from unit to unit.*
- *Public amenities will be provided to enhance and promote a community within the AgeBetter project.*

Social and Racial Equity

1. **Standard Affirmative Marketing practices appear to be ineffective in reaching Asian and Latinx renters. Please elaborate on the approach that Gorman and AgeBetter will use to affirmatively market and provide outreach to prospective Asian and Latinx applicants, as opposed to “across all races and ethnicities” and/or specifically African American seniors referenced in questions 14 & 15.**

AgeBetter’s SAIL program is currently engaged in increasing its ethnic diversity across membership, service providers and volunteers. AgeBetter hired Deborah Biddle, diversity expert, to lead a diversity assessment followed with development of strategies for outreach and inclusion. AgeBetter Community Living will incorporate these same strategies in attracting Asian and Latinx renters. The current SAIL membership of over 500 seniors living in and around Madison, plus employees, residents, and community organizations collaborating with AgeBetter’s member organizations (Oakwood Village and Attic Angel Association), and the NewBridge organization will be asked to assist in outreach efforts reaching Asian and Latinx renters.

Financing

1. Please explain how Developer Overhead (not development fee) is calculated and what impact this figure has on developer fee.

Per the email correspondence between Duane Buscher and Ethan Tabakin on 8/14/2020, Developer Overhead is simply the difference between aggregate developer fee and the deferred fee. Overhead is earned fee while the remaining developer fee is deferred as a source of financing. We split the aggregate developer fee between Overhead & Deferred Fee to mimic how WHEDA separates them in the tax credit application.

2. How did Gorman determine construction costs for this development at over \$140,000 per unit?

See attached itemized budget from Gorman's construction division.

Unit Mix

1. What utility allowance assumptions are Gorman and AgeBetter using for the one- and two-bedroom units?

Gorman is utilizing the Madison CDA 2018 utility allowance standards. Based on these standards we are assuming \$95.00 for a 1 bedroom and \$112 for a 2 bedroom unit.

Supportive Housing Units/Supportive Housing Partnerships

1. Please describe SAIL's fee structure, or confirm that AgeBetter will commit to utilizing the same fee structure presented last year. What is the current fee and related reduced rates at 75 and 25% respectively?

Income Level:	Reduced Fee: (\$34.00 Standard Rate/month)
Low	75% Current Rate \$25.50
1 Person	\$44,950
2 Persons	\$51,400
Very Low	25% Current \$8.50
1 Person	\$28,950
2 Persons	\$33,050
Extremely Low	\$4.00/Month
1 Person	\$17,200
2 Persons	\$19,650

Yes we will be using the same fee structure as last year.

2. How will SAIL prevent resident isolation, particularly for tenants that do not join SAIL?
SAIL will warmly and enthusiastically invite residents (member and non-member) to volunteer throughout the year on various activities and events that benefit AgeBetter Community Living. SAIL will also host weekly programs onsite that will be open to all residents. In addition, community-based case managers, service providers, support groups, wellness groups, spiritual groups, etc. will be invited to host programs and/or

conduct 1:1 or group meetings and invite all residents. A new member welcome and buddy system approach will be in place to help prevent isolation and loneliness amongst the residents, similar to SAIL's Good Neighbor Program.

- 3. This RFP prioritizes housing people experiencing homelessness or those who were formerly homeless. Would this development consider setting aside some units and partnering with a service agency to align with these priorities?**

We would prefer not to set aside these types of units.

- 4. Which priority points in terms of supportive service units will this project seek in order to be competitive for FHLB-AHP? E.g., Will Gorman seek AHP points with hard set-aside for people experiencing homelessness?**

We plan to set aside units for disabled units if required for a competitive score to obtain FHLB-AHP funding.

- 5. Would Gorman and AgeBetter be willing to commit to early proactive coordination with the VA to ensure successful outreach and targeted population lease-up? How could this development draw on the relationships and systems developed for veterans at Valor?**

We are planning to engage our veteran referral network led by Dryhooch that has contact with very many senior vets within the Madison area. We are also in touch with all Dane County Legion Posts and VFW's within Dane County as a result of the county wide tour we embarked on when we submitted the Valor application.

- 6. Please attach updated letters from Supportive Service Providers detailing the services they will provide to this development.**

See attached updated letters for the following Supportive Service Providers:

- *NewBridge*
- *RSVP*
- *ADRC (to be provided by end of day)*

Scoring

- 1. Please provide a revised WHEDA self-score, if the estimated score has changed since Gorman has fully analyzed the 2021-22 WHEDA QAP.**

See attached self-score for 9% application, and 4/4 application.

- 2. Has a decision been reached about submitting the LIHTC application to WHEDA as a 9% or as a 4% Federal and 4% State Tax Credit application?**

Not at this time. The most feasible deal is a 9% submittal with the dollars requested. We believe a 4-4 deal could score in the credit but it is currently under-sourced so we would need more gap financing or a reduction in project costs.

PLEASE FIND ATTACHED THE FOLLOWING DOCUMENTS:

- *Updated support letters from New Bridge and RSVP*
- *Schedule of Values (SOV) budget breakdown*
- *9% credit projected WHEDA scoring*
- *4/4 credit projected WHEDA scoring*



...where volunteers make a difference

August 4, 2020

Ann Albert, Executive Director
AgeBetter, Inc.
6209 Mineral Point Rd, #210
Madison, WI 53703

RE: Proposed AgeBetter Community Living Development
6145 Mineral Point Rd, Madison

Dear Ann:

As Executive Director of RSVP of Dane County, I am excited to hear about your proposed affordable housing development for seniors on the west side of Madison. Through our daily work with the senior community, we understand the strong and growing need for affordable senior housing in the Madison area.

RSVP (Retired and Senior Volunteer Program) is a nonprofit organization that recruits adults age 55 and older for meaningful volunteer assignments in the community. RSVP's Driver Services/Vets Helping Vets program which provides transportation and delivers meals, helps seniors remain independent and able to age in place.

We are interested in partnering with AgeBetter to provide our services to resident seniors in the proposed development. Specifically, this would include volunteer opportunities in the community, rides to medical appointments, and continued collaboration in the Triad Crime Prevention and Safety Program which includes educational sessions plus car winterization that would benefit residents at the new AgeBetter Community Living housing. We are excited about the opportunity to expand our partnership with AgeBetter and support the proposed AgeBetter Community Living Development.

Sincerely,

Margie Zutter
Executive Director



August 4, 2020

Ann Albert
AgeBetter, Inc.
6209 Mineral Point Rd. #210
Madison, WI 53703

RE: Proposed Affordable Senior Housing Development - AgeBetter

Dear Ann,

As the Executive Director for NewBridge Madison, I am excited to hear about your proposed affordable housing development for older adults on the west side of Madison. Through our daily work with the older adult community, we understand the strong and growing need for affordable housing in the Madison area.

NewBridge Madison, Inc. is a nonprofit organization that started in 2019 after the four Madison Senior Coalitions merged in 2019. While a new organization, it has a long history of over 40 years of service. To ensure longer, safer and healthier independent lives, NewBridge Madison provides a variety of services for older adults at no or low cost, which include: case management, nutrition program, home chore volunteer program, guardian and representative payee volunteer program, cultural diversity program, caregiver program and social and educational activities.

We are interested in partnering with AgeBetter to provide our services to resident older adults in the proposed development. Specifically, this would include

- Case management services for residents 60 years and older who are income eligible.
- Transportation from the housing development to the closest nutrition site for a donation price.
- Home chore volunteers for residents who are case management clients and who are income eligible.



- Site for social and education activities.

We also look forward to increasing connections of older adults we work with through NewBridge Madison with AgeBetter housing and SAIL-Sharing Active Independent Lives programs and services, thus expanding the resources that help older adults live safely and independently in our community.

Sincerely,

A handwritten signature in blue ink, which appears to read "Jim Krueger", followed by a long horizontal flourish.

Jim Krueger
Executive Director
NewBridge Madison, Inc.



DANE COUNTY EXECUTIVE – Joe Parisi
DEPARTMENT DIRECTOR – Shawn Tessmann
DIVISION ADMINISTRATOR – Todd Campbell
ADRC MANAGER – Jennifer Fischer

Ann Albert
AgeBetter, Inc.
6209 Mineral Point Rd #210
Madison, WI 53703

August 19, 2020

RE: Proposed Affordable Senior Housing Development - 6145 Mineral Point Road, Madison WI

Dear Ann Albert,

This letter confirms our understanding to initiate a collaborative relationship with your agency and other local partners to connect future residents of the proposed development with appropriate serviced and service providers in Dane County. Throughout daily work with the Dane County community, we understand the strong and growing need for affordable senior housing in the Madison area.

The Aging and Disability Resource Center (ADRC) is the first place to go to get accurate, unbiased information on all aspect of life related to aging or living with a disability. The ADRC provides information on a broad range of programs and services and helps people understand the various long-term care options available to them, helps people apply for programs and benefits, and serves as the single access point for publically funded long-term care.

We are interested in collaborating with AgeBetter to provide our services to resident seniors in the proposed development. We understand AgeBetter will be helping to connect residents to the ADRC by distributing the ADRC brochures and newsletters, offering ADRC outreach and speaking opportunities at the site, providing residents with volunteer transportation to the ADRC for scheduled appointments, and providing ADRC staff notices of apartment vacancies as they occur. We look forward to helping AgeBetter residents learn about and have access to the many services and resources available throughout Dane County.

Sincerely,

Jennifer Fischer, ADRC Manager