

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 June 27, 2019**.

Email to: cddapplications@cityofmadison.com

APPLICANT INFORMATION

Proposal Title:	TSA Mifflin Street Apartments		
Amount of Funds Requested:	\$1,000,000	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Name of Applicant:	The Salvation Army		
Mailing Address:	5550 Prairie Stone Parkway, Hoffman Estates, IL 60192		
Telephone:	(847) 294-2154	Fax:	
Admin Contact:	Bramwell E. Higgins	Email Address:	Bramwell.Higgins@usc.salvationarmy.org
Project Contact:	Major Andrew Shiels	Email Address:	Andrew.Shiels@usc.salvationarmy.org
Financial Contact:	Jerry Burka	Email Address:	jerry.burka@orchardconsult.com
Website:	https://centralusa.salvationarmy.org/usc/		
Legal Status:	<input type="checkbox"/> For-profit <input checked="" type="checkbox"/> Non-profit	Type of LIHTC Application:	<input type="checkbox"/> 4% <input checked="" type="checkbox"/> 9%
Anticipated WHEDA Set-Aside:	<input type="checkbox"/> General <input type="checkbox"/> Preservation <input checked="" type="checkbox"/> Non-Profit		
Federal EIN:	36-2167910	DUNS #:	962440868

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: Bramwell E. Higgins

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 **BEH** you are electronically signing your name as the submitter of the application and agree to the terms listed above.

Date: 6/26/19

PROPOSAL DESCRIPTION

1. Please provide an overview of the proposal. Describe whether project is acquisition, rehabilitation, and/or new construction; multifamily or senior. Provide the total number of units proposed, the number and percent of affordable units proposed, and the impact of the proposed development on the community.

The Salvation Army (TSA), with a long and rich tradition of providing housing and social services worldwide, intends to develop new residential multifamily apartments, Mifflin Street Apartments, on a site located along the north side of East Washington Avenue, between North Blair and North Blount Streets, extending northwesterly to East Mifflin Street. The site is located within the Capitol East District on the southern border of the Tenney Lapham Neighborhood. The project will be a newly constructed three-story building that will include 44 total apartment units, 37 affordable apartments (84% of the building) and seven market-rate apartments. The Mifflin Street Apartments will be constructed in accordance with the Wisconsin Green Built Home Standard Plan and will incorporate Universal Design Standards for accessibility.

Currently, TSA owns and operates an existing shelter facility on an adjacent 1.34-acre site which is the only emergency shelter in Dane County serving single women and families. TSA has acquired new property to the north and northwest for an additional 0.91 acres sited with corner frontage on North Blount Street. The acquisition of the adjacent site allows the Salvation Army to expand the overall campus with a new redevelopment plan, comprising two main components. First, in order to fulfill TSA's mission and continue providing the current shelter services to the homeless in the community, a capital campaign will be launched in 2019 to replace the shelter building at 630 E. Washington Ave with a modernized facility that will incorporate shelter services, transitional housing, and TSA administration offices. The building will have expanded, dedicated spaces for medical and dental clinics, and new space to dramatically expand mental health services. The shelter building will include a kitchen to continue meal service, a gymnasium, and space for children's activities. The second component will be the Mifflin Street Apartments project, which is a way to offer some TSA clients a continuum of housing to help them succeed at reentering the private housing market. This two-part redevelopment plan represents a substantial investment by The Salvation Army into the neighborhood, totaling approximately \$40 million.

The Mifflin Street Apartments project will be financed with equity from Federal low-income housing tax credits and a construction loan from The Salvation Army Central Territory (at a favorable interest rate), in addition to the requested funds from the City and planned applications for funding to Dane County and the Federal Home Loan Bank's AHP program. The Salvation Army will also reinvest a portion of the developer's fee back into the project. While this will be an exciting and significant development for the neighborhood, the project site is also ideally located due to its proximity to a number of community amenities, including employment opportunities, public transit, a full service grocery store, schools, parks, and other basic amenities.

The unit mix will include 17 efficiencies and 27 one-bedroom units, with 9 units being fully accessible. Each unit will have internet service, a washer, dryer, kitchen with a refrigerator, oven/range, and garbage disposal. Twelve (12) units designated as integrated supportive housing units will be fully furnished. Other facility spaces include office space for property management, supportive services, and a community room. The site will contain surface parking as well as underground parking for residents and staff members, bicycle parking; an outdoor play space for children will be part of the TSA's adjacent shelter campus. The new rental housing component will be offered to the general population, as well as targeted populations who require supportive services to help them lead stable, successful lives. To this end, the Mifflin Street Apartments project will offer an on-site case manager to coordinate supportive services provided by The Salvation Army of Dane County. In addition, quality recreational space, clinic space, and other supportive services will be housed in the neighboring shelter facility.

Mifflin Street Apartments has the benefit of an experienced and successful development team. The Salvation Army Central Territory as developer and Gateway Consulting have worked together for more than 10 years developing multifamily properties across the Midwest, including those financed with LIHTC, HUD Section 202, HOME, CDBG, and FHLB AHP. With JLA Architects leading the functional design of the redevelopment, Mifflin Street Apartments will be well planned and will provide very attractive, professionally-managed modern affordable housing to qualified low-income residents in a desirable location. This project will be nothing less than a high-quality, green-certifiable urban development which serves to strengthen our community with additional safe, affordable rental housing.

2. What are the total number of units proposed to be assisted with City AHF and amount of AHF requested per affordable unit? Identify if any of the units will be supported by Section 8 project-based vouchers.

Thirty-seven (37) of the units would be assisted with City AHF, with \$27,027 AHF requested per unit. Twenty-seven percent of the total units would be reserved for residents with incomes at or below 30% of AMI. These 12 units targeted to households with incomes at or below 30% AMI include six efficiencies and six one bedroom units. To further support these tenants, a TSA project-funded housing assistance program would be established to guarantee rental income while only requiring tenants to pay 30% of their actual income towards the rent. (This program would be established only if project-based rental assistance was not available from other sources, for example, from the Dane County Housing Authority.) The 25 remaining affordable units would be targeted to households making up to 50% AMI (13 units) and 60% AMI (12 units).

3. 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 developer entity will be The Salvation Army (TSA), an Illinois nonprofit corporation, which is responsible for all programs, services and facilities within the Army's 11-state Central Territory, which includes the State of Wisconsin. The Salvation Army Services Inc. (SASI), a wholly-owned subsidiary of TSA, will serve as general partner of the project owner and will oversee all components of the development, construction and operations during the extended use period, including oversight of the management functions and ongoing compliance. SASI, like TSA, is an Illinois nonprofit corporation and has been the general partner in each LIHTC partnership for the projects that The Salvation Army has developed in the Central Territory. The Army's Dane County staff, headquartered in Madison, will be the primary project contact agency. TSA of Dane County will also serve as the lead agency for resident referrals and for implementing and operating the supportive services plan. A third-party professional management agent will be under contract by the project ownership entity for the property management services. TSA is currently undergoing the required procurement process to select and finalize an agreement with the management company.

4. 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.

This is not applicable to this project.

AFFORDABLE HOUSING INITIATIVE FUND GOALS & OBJECTIVES

5. Please check which of the following objectives outlined in the Request for Proposals your proposal meets:

- 1. Increase the supply of safe, quality, affordable rental housing throughout the City.
- 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

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

The Salvation Army began its mission in Madison, Wisconsin in 1890, serving the Dane County community. Its ministry is motivated by the love of God and its mission is to meet human needs without discrimination. The year 2020 will mark the Salvation Army's 130 year anniversary. Over the course of these nearly 130 years, we have gained first-hand knowledge of the very real need for safe, quality, and affordable housing in the community. The Salvation Army of Dane County hosts six housing programs and a Diversion Program--an effort to keep families and individuals from entering the shelter system at all. Our housing background and experience includes providing two emergency shelters for the homeless (serving single women and families), transitional housing for homeless single women to establish self-sufficiency, Rapid Rehousing programs in partnership with other local social service agencies, and the DAWNS (Dane County Assists with New Starts) program. DAWNS follows a rapid rehousing model to place homeless people into stable and permanent housing in the private market with ongoing case management and some rent assistance. From working with these particular programs and helping to transition homeless people into housing, we have witnessed the supply of affordable housing in the local community to be a critical piece in ending homelessness. The Salvation Army is uniquely qualified to understand the dynamics of the local market and neighborhood and to work with existing political, business and community stakeholders to design, develop, produce, and operate a multifamily project that will meet the needs of low-income residents living in the area.

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

The Salvation Army has been serving the targeted population in this precise location for more than 40 years, when we purchased a former Catholic school building at 630 East Washington in 1977. Because we are an established and reputable social service and shelter provider, we are aware of the demand for permanent housing right outside our doorways. Since 2016, our rapid rehousing program has found stable places to live for 487 people, which includes 125 families and 46 single women. According to the Homeless Services Consortium in Madison and its community by-name housing list, there are 642 singles and 122 families waiting. The need is clearly high for singles, which is why we have decided to target our permanent housing efforts primarily for single individuals. We know that single men and women are in extreme need of safe, more reliable rental housing units to call home. However, our proposed one bedroom units can also serve very small families. The Salvation Army's internal numbers in Dane County also reflect a great need for permanent supportive housing. The shelter programs managed by The Salvation Army of Dane County served more than 250 families and 500 single women in 2018. An estimated 700 families and 150 individuals were not able to be accommodated in 2018 due to lack of space.

According to the 2000 U.S. Census and the 2007-2011 American Community Survey (ACS), data suggests a decrease in the supply of one-room housing units, also known as single room occupancy (SRO) units. A reduction in the total number of such units is consistent with the observations of the local market as reported in the City of Madison's "Analysis of Impediments to Fair Housing Choice" in 2013. SRO units are among the most affordable units in any housing market, and a reduction in the supply of these units means there are fewer options for the most disadvantaged residents, including those with very low incomes and those at risk for homelessness. This disproportionately affects non-white and disabled residents for whom such units may be the best, or the only, viable housing option. For this reason, The Salvation Army of Dane County was purposeful in choosing efficiencies and one-bedroom units for the proposed Mifflin Street Apartments project, as well as designing 25 SRO units in the proposed shelter building.

According to the 2018 FFIEC Census Report, the proposed project site is contained within census tract 18.02, a tract that has been automatically included in the 2019 Distressed or Underserved Tract List, has a high unemployment rate, and high rent burden. Just one block away from the project site is a designated 2019 Qualified Census Tract. It is also located less than a half mile from two different census tracts that are designated as High Need Areas. (Baker-Tilley has been engaged as a Market Study provider for this project. We will provide the results of this market study as it becomes available.)

INTEGRATED SUPPORTIVE HOUSING UNITS

8. 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, etc.).

12 units (27% of the total units in the building) will be designated for integrated supportive housing. The maximum income allowed for these units will be 30% AMI, specifically serving households experiencing homelessness or those threatened with homelessness, veterans, and/or persons with disabilities. These 12 units will be designated for tenant referrals from the Coordinated Entry Systems Manager of the Homeless Services Consortium (HSC). The Salvation Army of Dane County has been a service provider for the HSC for many years and plans to continue its role and coordination with the consortium, providing supportive services for individuals and/or families experiencing or at risk of homelessness.

9. 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.

This innovative project goes beyond WHEDA'S supportive housing requirements by providing a permanent housing solution for some homeless clients of the current Salvation Army shelter. With the construction of its own affordable apartments, The Salvation Army will continue to embrace the "Housing First" model, thus also furthering the stability of this neighborhood. The new apartments will be the first step in a campus approach by The Salvation Army, as additional land is available at the shelter site on which to build this separate building. The campus approach will allow for the more efficient provision of services to those in need. The 37 affordable living units and associated community space to be constructed will allow The Salvation Army to continue its mission to serve the underprivileged in a way more in keeping with current best practices. A portion of the Mifflin Street Apartments (12 units) will be targeted to homeless adults or those threatened with becoming homeless, many of whom may be veterans and/or disabled, and the project will provide a much-needed "Housing First" solution. The Salvation Army of Dane County will serve as the lead local agency for the project and will provide on-site service coordination in its implementation of the comprehensive supportive services plan.

10. 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.

The Salvation Army of Dane County, as a current service provider and participant in the Continuum of Care, will provide residents with comprehensive, case-managed supportive services. Twelve of the units will be designated as units for the Homeless Services Consortium and its housing placement system using the community by-name housing list. TSA will offer these residents voluntary, on-site case-managed supportive services. Residents will have access to a variety of social services from The Salvation Army and partner providers. TSA will coordinate referrals to, and facilitate Mifflin Street Apartments residents' access to, services provided by other agencies, in accordance with each resident's individually assessed needs. The services to which residents will have access include:

- needs assessment and comprehensive housing focused case management
- adult basic and vocational education, including basic computer skills
- life skills training
- dental services (clinic on site)
- medical services (clinic on site)
- mental health services (clinic on site)
- support group meetings
- benefits advocacy
- employment services and help with transportation services
- recreational opportunities
- legal services
- veterans' services
- financial skills training and credit counseling, and income support, as needed

Quality recreational space, clinic space and other supportive services will be housed in the neighboring TSA shelter facilities.

11. 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.).

The Salvation Army intends to financially support 100% of the supportive services offered at Mifflin Street Apartments. As part of TSA's commitment to supportive services, the salary of the on-site case manager will be paid by The Salvation Army. As a social service agency, we feel that supportive resources are the most important, essential services that we can offer to our clients and there will be no shortage of financial measures in order to meet the resident's needs for them to be successful in maintaining permanent housing. The Salvation Army will also utilize a portion of its Developer Fee to establish a project-based rental assistance program to ensure the long-term affordability of the 12 targeted units in the project.

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

The Salvation Army of Dane County currently receives approximately \$1,000,000 annually from Dane County to fund its emergency overnight shelter for single women and families and its DAWNS program, which offers a rapid rehousing package for single women and families. DAWNS includes weekly case management sessions, and funding for a security deposit, and first month's rental assistance. We expect that potential DAWNS clients could be placed at Mifflin Street Apartments and the funding from Dane County to be used as part of that program. In addition, a project-funded housing assistance program would be established to guarantee rental income for the 12 integrated supportive housing units while requiring tenants to pay only 30% of their actual income towards the rent. This program would be established only if project-based rental assistance was not available from other sources, for example, from the Dane County Housing Authority.

TENANT SELECTION

13. 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.

In accordance with the Housing First approach, TSA is in full support of flexible resident screening criteria. We will work with our third-party property management team, when selected, on developing Tenant Screening Policies to reduce barriers to fair housing choice. We understand first-hand that preconditions can often be a barrier to finding permanent housing for those who are homeless. The decision on screening criteria will ultimately be that of the property owner, and TSA will stand firm on using the Best Practices as outlined by the City of Madison. The following categories will be addressed in our Tenant Selection Plan:

Income Criteria

There will be no minimum income requirement for applicants in the designated supportive services units 30% or below AMI. The project-funded TSA housing assistance program will guarantee rental income for the 12 integrated supportive housing units. According to Novogradac, the maximum income limits for 30% AMI in the Madison Metropolitan Area are \$21,090 (one person) and \$24,120 (two persons). The income limits for the 13 units at or below 50% AMI are \$35,150 (one person) and \$40,200 (two persons). The income limits for the 12 units at or below 60% AMI are \$42,180 (one person) and \$48,240 (two persons).

Credit Score/Report

Applicants will not be denied due to a low credit score, provided he or she is enrolled in a credit repair program.

Housing History

Housing history will be considered for the last two years. Applicants will not be denied due to a lack of housing history, eviction judgment, or for owing money to a prior landlord for rent or damages, provided he or she has entered into a payment arrangement with the debtor and is current on the repayment arrangement.

Waitlist

Apartments will be rented on a first come, first served basis. Management will place the applicant on a waiting list for the development and will contain the following information for each applicant listed: 1. Applicant name, 2. Household unit size (number of bedrooms household qualifies for under site occupancy standards), 3. Date and time application received, 4. Qualification for any preferences and ranking, 5. Annual income level, 7. Accessibility requirements. The waiting list will be maintained in accordance with the following guidelines: All applicants will be maintained in order of preference. Applications equal in preference will be maintained by date and time sequence.

Violence Against Women Act (VAWA)

Victims of domestic violence, dating violence or stalking, as well as their immediate family members will not be denied admission if an incident of violence is reported and confirmed.

Criminal and Felony Convictions

Two years will be considered in a criminal background search. Applicants will not be denied solely based on arrest records. TSA will screen for current probation or parole, history of sexual-related offenses, and other criminal offenses that demonstrate a risk to resident safety and/or property.

Preferences

Preferences are not permitted if they in any way negate affirmative marketing efforts or fair housing obligations. Populations targeted to lease the 12 supportive services units will be referrals from the Coordinated Entry Systems Manager of the Homeless Services Consortium (HSC). The preference will be for individuals and/or families experiencing or at risk of homelessness, veterans, or disabled persons.

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

The Occupancy Standards for the development are:

The unit must have enough space to accommodate the household. Occupancy standards must comply with federal, state and local occupancy standards, and/or laws in connection with occupancy requirements, fair housing and civil rights laws, as well as landlord-tenant laws and zoning restrictions. Each unit will be occupied by a minimum of one person per bedroom at the time of occupancy. For the purpose of determining the unit size for which a household may be eligible; the following will be counted as members of the household:

- a. Fulltime household members
- b. Unborn children
- c. Children in the process of being adopted
- d. Children whose custody is being determined
- e. Foster children
- f. Children temporarily in a foster home
- g. Children in joint custody 50% of the year or more
- h. Children away at school but home for recess
- i. Live in aides
- j. Foster adults

PUBLIC PURPOSE AND RISK

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

Mifflin Street Apartments and the total comprehensive redevelopment plan for the Salvation Army campus in Madison will serve the public welfare for purposes of improved public safety, public health, neighborhood stabilization, and urban housing development. Risks associated with the project include increases in construction costs due to increases in the cost of building materials or labor, increases in interest rates which result in increased holding expenses, and unexpected expenses being incurred for remediation, repairs or refurbishment.

SITE INFORMATION

16. Address of Proposed Site: 601 East Mifflin Street, Madison, WI 53703 (actual address to be determined)

17. 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 Areas (New Construction Only)
- Eligible Areas (New Construction & Acquisition/Rehabilitation)
- Targeted Rehab Areas (Ineligible for New Construction, but Preferred for acquisition & rehabilitation proposals)

18. Identify the neighborhood in which the site is located: Tenney-Lapham

19. Date Site Control Secured: 4/19/2019

20. 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 to show the site in the context of the City.)

The site was chosen because the Salvation Army owns existing property at 622 and 630 East Washington Avenue and had the opportunity to expand its footprint with the acquisition of adjacent property to the north of the current TSA shelter. The intersection of the project site is East Washington and North Blount Street, extending to East Mifflin Street. The current Salvation Army shelter facility has served the community since 1977 using a former Catholic School that was constructed in 1961 and converted to a family and women’s shelter with former classrooms converted to offices and residence rooms. It is now at the end of its useful life due to inefficiency of design and serious health and safety concerns. The building no longer meets the current and projected needs of TSA’s program delivery. In order to fulfill The Salvation Army’s mission and to continue providing the current shelter services to the homeless in the community, a capital campaign will be launched later in 2019 to replace the shelter building with a modern and more useful facility. In addition to shelter services, the Salvation Army would like to expand the stock of permanent affordable housing in Madison with a rental housing component on the same campus, the proposed Mifflin Street Apartments project. The average home in Madison is valued at more than \$300,000, and it is well known that affordable units for people who work hard in lower-paying jobs are hard to find. The Salvation Army project will provide new options and allow the City to expand its affordable housing opportunities near the downtown area.

The subject property straddles the border between the core downtown area and east downtown neighborhoods of Mansion Hill and First Settlement at the southeastern end of the Tenney-Lapham neighborhood. It lies six blocks northeast of the Capitol Square along the East Washington Avenue (U.S. Hwy. 151) corridor in the central isthmus within the city defined Capitol East District that extends roughly from the Yahara River to the north to the Capitol Square to the south. Until very recently, the neighborhood was primarily an aging industrial corridor that is now undergoing extensive redevelopment for mixed-use and high-density residential, commercial, entertainment and business incubation. This is home to Madison Gas & Electric Company, which has its large coal-fired power plant (Blount Generating Station), main offices and various electrical generating substations concentrated between East Main Street, the Capitol City Bicycle Trail, South Blair and South Livingston Streets.

21. 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 are no existing buildings on the proposed site of Mifflin Street Apartments. However, the adjacent site houses the current Salvation Army shelter building, which will be razed and replaced with a newly built five-story building to include emergency shelter, single occupancy rooms, TSA administration offices, as well as dental, medical, and mental health clinics. Relocation of the shelter residents will be required before demolition of that structure can take place.

22. 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	Festival Foods	.2
Public Elementary School	Lapham Elementary School	.7
Public Middle School	O'Keeffe Middle School	1.4
Public High School	East High School	1.7
Job-Training Facility, Community College, or Continuing Education Programs	The Beacon	.1
Childcare	Red Caboose Child Care Center	.4
Public Library	Madison Public Library,	.7
Neighborhood or Community Center	Wil-Mar Neighborhood Center	.7
Full Service Medical Clinic or Hospital	UnityPoint Health - Meriter - West Washington Clinic	.8
Pharmacy	Walgreens Pharmacy	.5
Public Park or Hiking/Biking Trail	James Madison Park	.3
Banking	Associated Bank	.2
Retail	ShopBop	1.2
Other (list the amenities):	Madison Senior Center	.9

24. What is the 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 328 feet to the nearest transit stop at E Washington & N Blair (Westbound); Stop ID 1214. There is an Eastbound bus stop directly across the street on E Washington and S Blair; Stop ID 1579. Eight different bus routes stop at both of these locations on weekdays including route numbers 6, 14, 15, 25, 27, 37, 56, and 57. Route 6 offers the most frequent service with a bus running westbound (Stop 1214) every 15 minutes in the early morning and afternoon commute hours and then increasing to every 30 minutes at 8:50 am and 5:49 pm during weekdays. Eastbound service (Stop 1579) for Route 6 runs every 15 minutes beginning at 5:55 am and increasing to every 30 minutes at 9:34 am, as well as every 15 minutes during the afternoon commute and increasing to every 30 minutes at 6:35 pm on weekdays. Route 6 is the only bus serving these two bus stops on weekends with service every hour until 10:25 pm (Stop 1214) and 11:03 pm (Stop 1579).

25. Describe the transit options for children to get to their elementary and middle schools.

The project site location is 0.7 miles from Lapham Elementary and therefore not eligible for District-provided, yellow bus transportation because the site is not located more than one and one-half (1.5) miles from the attendance area elementary school. Lapham Elementary is considered to be within walking distance of the site location, four blocks from the proposed Mifflin Street Apartments. The same is true for the nearest middle school, O'Keeffe Middle School, which is located 1.4 miles from the project site. However, Metro Transit offers bus route 6 along East Washington Avenue with service to O'Keeffe Middle.

(In addition to Mifflin Street Apartments, TSA will be developing an emergency shelter which is not subject to this funding application. Regarding the shelter portion of the development, TSA is currently serving this population. The Transition Education Program (TEP) of the Madison Metropolitan School District currently provides transportation to the children's school of origin, and TEP will continue to transport the student to their previous school, via cab, bus, or other mode of transportation, for the school year. When a family checks in at the TSA shelter for the first time, TEP is contacted that night.)

26. 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.

The neighborhood is well connected to all parts of the city by bus lines, major arterial roads, as well as bicycling/recreational paths. Both East Washington (two-way, three-lane each direction) and East Johnson Streets (one-way, three-lane one direction) are primary commercial thoroughfares that feature mostly locally-owned business establishments including: restaurants, neighborhood services, small markets and convenience shopping. The project site scored a 91 Walk Score. The Beacon, a comprehensive day resource center for people who need help with employment and computer skills, is located within walking distance directly across the street at 615 East Washington Ave. Festival Foods, a family-owned supermarket chain stocking meat & seafood, produce & organic foods, is also located one block away within walking distance. Associated Bank is two blocks from the project site. Red Caboose Child Care Center is less than a half-mile away and provides a childcare center, an after school program, and summer camps. The nearest Madison Public Library branch and Wil-Mar Neighborhood Center are both .7 miles from the TSA site. UnityPoint Health - Meriter, the nearest full-service hospital, is less than one mile of the site, and is a major employer. A U.S. Post Office is located directly across N. Blount in the 700 block of East Washington.

27. Describe the impact this housing will have on the schools in this area. Please include information on school enrollment data (e.g. at capacity, above capacity, below capacity); how this housing development will impact the schools' enrollment; and 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 (608) 442-2920. Existing school capacity information can also be found at https://accountability.madison.k12.wi.us/files/accountability/uploads/enrollment_reports_combined_fall_2018.pdf.

TSA of Dane County social services staff does not anticipate Mifflin Street Apartments making any impact on the neighboring schools, simply because the unit mix of one bedrooms and efficiencies will primarily serve single adults. Occupancy rules will allow two persons to occupy the one bedroom units; however, those units are more likely to be occupied by couples or a single parent with a younger, non-school aged child. The elementary school of residency for Mifflin Street Apartments is Lapham Elementary, which is projected to be at 90.4% capacity within five years. O'Keeffe Middle is expected to decrease in enrollment numbers in the next five years, and East High School is currently at only 60.4% capacity.

28. 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.

Phase 1 Environmental is currently underway at the site. The report will be submitted to the City once it is completed.

29. Current zoning of the site: TE

30. Describe any necessary zoning-related approvals (rezoning, conditional use permit, demolition, zoning variance, etc.) that must be obtained for the proposal to move forward.

According to City Planner Timothy Parks, rezoning of the property will not be needed based on a preliminary zoning review of the conceptual master site plan proposed at the June 6th DAT meeting. All of the components of the proposed development can be accomplished in the existing TE zoning of the properties. Mifflin Street Apartments will be considered part of the "zoning lot" even if it is located on a separate lot under different ownership. The zoning approvals will be governed by one common set of plans and supporting documents. The project will need Plan Commission approvals of a demolition permit for the existing shelter structure to be removed and the conditional use permits for the building and uses proposed. Urban Design Commission approval will be required for new development in Urban Design District 8.

31. 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 at <https://cityofmadison.maps.arcgis.com/apps/webappviewer/index.html?id=71c4ec1397554f2ab702f2c6c377bb3a>.

Within the City of Madison's Comprehensive Plan, Mifflin Street Apartments would be consistent with several of the strategies adopted by the Common Council on August 7, 2018. This includes Strategy 7 of Land Use and Transportation which states, "Maintain downtown Madison as a major activity center for the region while improving access and inclusivity." An action within this strategy calls for the continued use of the City's Affordable Housing Fund to support construction of affordable housing in and near downtown. Much of the recent development in and around downtown has been focused on high-end residential units. TSA's redevelopment plan would make downtown living more available to households of all income levels, while securing AHF funding on the isthmus. Within the Neighborhoods and Housing element of the Comprehensive Plan, a stated goal is for Madison to have a full range of quality and affordable housing opportunities throughout the City. TSA meets Strategy 4, Action E which allows Community Development, Planning, and Economic Development to support and partner with a non-profit organization to preserve affordable housing for the long-term. Strategy 5 addresses the topic of providing housing options with health and social services for residents who need it most, including those experiencing homelessness. Through partnership with TSA, the Community Development Division can support an organization that provides temporary shelter and access to a full range of supportive services in or near affordable housing.

Tenney-Lapham has a Neighborhood Plan, which was adopted by the Madison Common Council in 2008. A significant issue that emerged from this plan is ensuring that affordable, quality housing opportunities continue throughout the Neighborhood. The plan supports organizations that provide a range of housing options for individuals and families of low and moderate income. Mifflin Street Apartments will offer such options for renters in the neighborhood. A second issue within the Neighborhood Plan is beautifying East Washington Avenue through better landscaping of building exteriors, city terraces, and parking lots. This project will redevelop a vacant lot and bring aesthetic design appeal to an otherwise underutilized corner of the Tenney-Lapham Neighborhood. Land Use Goal 4 addresses redevelopment of the 600 block of East Mifflin and sets out design standards for building height. Mifflin Street Apartments will adhere to the maximum façade height of 3 stories to avoid drastic changes of scale between buildings on the same block. The total number of units proposed is also consistent with the Neighborhood's High Density Residential (HDR) designation for that block.

While the Generalized Future Land Use Map shows this address site as part of the High Residential designation which includes predominantly larger and taller multifamily buildings, the Tenney-Lapham Neighborhood Plan wanted to amend this general land use recommendation according to the neighborhood's land use goals adopted in 2008.

33. What is the anticipated date of your presentation to the City's Development Assistance Team (DAT)? If you have already presented to DAT, please provide the date of your presentation and summarize the comments to your proposal from staff.

The DAT meeting took place on Thursday, June 6, 2019, between 9:00 AM and 9:30 AM

The relevant comments or discussion points are as follows:

Public Transportation, Bus Stops, Pedestrian Crossings

The City official pointed out where the current bus stops and crosswalks are. There are currently no bus stops in front of the site. The official asked how many units are currently at the site and how many would be there after the new projects are built. His concern was that there may be an increased demand for public transportation at the site, which, he indicated, is not currently budgeted by the transit authority. Further, he noted that on weekends, there is only one hourly bus service on East Washington so this may be an issue for residents of the new apartment building, assuming that many of them will be public transportation dependent. The City official suggested that there be a "minor" traffic study commissioned to ascertain the extent of this issue. (NOTE: TSA plans to directly engage the traffic study.)

Engineering/Storm Sewers

The City official reminded the JLA Architects that the 852 elevation must be adhered to at all vehicle entrances to the campus. He indicated that storm sewer fees will also likely be required and these will be determined once the plans are officially submitted.

Engineering/Mapping

The City official indicated that all existing parcels will need to be consolidated according to City requirements. He said that the apartment building would have a Mifflin Street address.

Parking Requirements

The City official indicated that the actual parking requirements will be determined once all the various building uses, unit sizes, etc., have been determined and submitted to the City for review.

Urban Design

The City official pointed out that the City code requires buildings to be oriented to the street on which they front. She indicated that this may affect placement of the apartment building. (NOTE: As of 6/26/19, JLA has made site plan changes to incorporate this recommendation. The location of the apartment building has now been altered to be oriented to E. Mifflin Street.)

Community Development

The City official (Julie Spears) indicated that The Salvation Army plans to submit for CD funds for the apartment building. She indicated that the City's RFP specifically indicates that all applicants are required to go through the DAT process. She also noted that The Salvation Army is the first project to go through DAT for this RFP round. (There was discussion between Julie Spears and the public transit official about the current state of affairs regarding public transit funding. Apparently, there's not enough funding for public transportation but enhancing this area is part of the City's long-term plans.)

Parks & Impact Fees

The City official (Kate Kane) described the impact fees that would apply to the buildings and provided some rough estimates for the one-time fees. (NOTE: TSA's consultant contacted Kate Kane following the DAT meeting to clarify the projected park impact fees for the Mifflin Street Apartments project.)

Forestry

The City official asked that the architect show all existing trees, any trees to be removed and any proposed trees to be added to the plans. He noted that there are existing overhead power lines on Mifflin Street that will need to be considered.

Zoning

The City official confirmed for the JLA Architects what zoning districts the property is in and there was a discussion about the various height restrictions. The City official echoed the earlier comment from Urban Design that the Urban Design Commission may be concerned about the placement of the various project buildings, the orientation of the structures to the streets, and specifically noted how the apartment building is not oriented in this manner and indicating that this may be

an issue that might come up when the site plan is submitted to UDC. The City official indicated that there's a meeting of the City planning staff on Tuesday, June 11th at which time it was suggested that JLA Architects could review the matter.

34. List the date of your pre-application meeting with City of Madison Planning Division staff and briefly summarize the comments provided by Planning staff during that meeting.

Our pre-application meeting was held during a conference call on May 22. The Planning Division cautioned TSA on creating hard lines between the two separate projects of the Affordable Housing Apartments and the Shelter Building. They felt that there needs to be an overarching umbrella between the 2+ acres being jointly developed, with some level of cohesion and singularity. More cohesion than less will be to the developer's benefit. Staff suggested figuring out what is shareable between the two projects. They also asked about underground parking versus open surface parking. Regarding zoning -- planning staff thought that one application may be sufficient.

35. 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?

Alder Patrick Heck was elected as District 2's alderperson in April 2019. Prior to this elected position, he was active with and served as the Vice President of the Tenney-Lapham Neighborhood Association. The Salvation Army of Dane County has been represented at the Neighborhood Association meetings for several years, and Alder Heck has been aware of the ongoing need for TSA to create an expanded redevelopment plan at their property. It is his objective to notify the households within Tenney-Lapham about the TSA plans, and allow their voices to be heard during this evaluation process. He has stated that there are ongoing issues at the current TSA site, particularly with nearby neighbors, and any improvement with them would be welcome. Concerns include a high number of police calls, disturbances, trespassing and drug use, often by people who hang around but are not using the shelter, Heck said. The Salvation Army wants to be a good community partner, to address security problems and improve the appearance of the site. The new redevelopment plan would allow opportunity for all of these issues to be addressed.

District 6 Alder Marsha Rummel is the adjacent alderperson of the project site. She is aware of the TSA proposal but was unfortunately absent at our most recent neighborhood meeting on June 6th. Project representatives have reached out to her, and she is currently reviewing the renderings and project plan, but we have not gotten her feedback at this time.

36. Describe the neighborhood 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?

The conceptual master plan for The Salvation Army's new emergency shelter/transitional housing and three-story apartment building was initially presented to members of the Tenney Lapham Neighborhood Association (TLNA) and the adjacent Marquette Neighborhood Association on June 6, 2019. District 2 Alder Patrick Heck and District 6 Alder Marsha Rummel co-hosted the neighborhood meeting which was held in the auditorium of the Lapham School, located at 1045 East Dayton Street, Madison. (Alder Rummel was unfortunately not able to attend the meeting.) This meeting was promoted in the summer edition of the TLNA Newsletter, which is distributed without charge to all households in the Tenney-Lapham Neighborhood, as well as through a direct mailing of postcards to households in both neighborhoods. All were welcomed to attend and hear about the Salvation Army's redevelopment plan. The meeting started at 6:00 PM. A copy of the conceptual master plan was presented on the auditorium's screen for all attendees to view. The meeting was attended by about 80-100 neighborhood residents and approximately 25 questions or comments were taken before the meeting closed at about 7:30 PM.

A summary of the issues or concerns expressed by the residents is as follows:

Current Impact of TSA Emergency Shelter on Neighborhood

A good number of the questioners expressed dissatisfaction with the existing conditions of the TSA site and were very critical of TSA's ability to monitor and enforce rules for bad behavior, particularly incidents that take place on the TSA parking lot. Many questioned why TSA should be allowed to build a new building, which would serve more homeless individuals and families than at present, when TSA seems to be struggling to adequately manage its current facility. One person commented that the Army should have rules to keep its shelter residents inside and not allow them to loiter in the parking area. Melissa Sorensen, TSA Social Services Director, commented that the Army's rule is that everyone needs to be inside by 10 PM when the doors are closed and locked but that they would never force residents to stay in all the time as residents, particularly the children, often need a chance to play outside. Melissa indicated that the new campus would include a large gymnasium that would allow for indoor play space.

Neighborhood Security

A number of questioners asked about security and safety concerns in the area and how the new TSA project might affect public safety. Several asked about what the City is doing to improve safety and whether more police officers could be assigned to the area. The audience included two police officers who encouraged people to call 911 whenever they observe any nefarious activity, as such calls will help address staff assignments. One commenter proposed that the Army fund a neighborhood-based policing program. (NOTE: Since the initial meeting took place, Madison College has offered to partner with TSA to provide a security assessment of the shelter site and look at its current challenges.)

Location of Project

A couple of residents asked about why this location is the best one for the shelter and whether an alternate site might be better. Underscoring these questions was an indication from the residents that the area was somewhat overwhelmed with a number of social service agencies and a feeling that the area had done its share.

Number of Individual/Families Served

One attendee asked for specific information on how many people are currently being served at the shelter and how many are expected to be served at the new location. TSA officials responded that the current facility can accommodate 22 families and 45 individual women and that the new shelter is being designed to serve 40 families, 60 individual women. The new shelter will also incorporate small transitional housing units not currently provided.

Dane County Homeless Population

There were a couple of questions about how many homeless people there are in Dane County and how many of them are actually from the area. Staff from the Army and the City provided information. Sarah Lim, a City Community Development Specialist, indicated that the last point-in-time survey completed in January 2019 showed 578 homeless individuals, 224 in households with children representing 66 families and 354 individuals without children. Sarah pointed out that most of the families were in shelters in the community, including the Army's shelter, while 13 percent stayed in unsheltered locations such as on the street, in vehicles, in tents, or other places not suitable for human habitation.

Construction Schedule and Shelter Relocation

There was a question about when construction of the new campus would begin and how long it would take. This was answered by Leah Teske, representative from JLA Architects, who indicated that the current schedule has construction beginning at the end of 2020 with construction taking 15-18 months. There was also a question of what would happen to the shelter operation during construction, which was fielded by Major Andrew Shiels from TSA of Dane County. He indicated that the Army is still working on the temporary relocation plan for the shelter development.

Collaboration with Beacon

There was a comment that Beacon is "bursting at the seams" and a question as to whether the Army would continue to collaborate with Beacon and whether the new campus would alleviate Beacon's current overcrowding conditions. Melissa Sorensen from the Army indicated that they would continue to work with Beacon and that the new campus should be able to relieve some of its overcrowding conditions.

Positive Comments / Call for Constructive Ideas

Several attendees commented in support of the Army's plan, one indicating that the plan is workable and that "there are so many positive things that the Army does at the site that other homeless kids don't have" and that keeping the Army in the area is very important. Another person indicated that the reason families occasionally loiter in the Army's parking lot is that the facility had met its capacity for the day and the families were left trying to determine where to go; expanding the shelter would help reduce this situation. One attendee directed a challenge to the audience indicating that all the problems in the area should not be the responsibility of the Army and that no one has offered any constructive comments or ideas to solve the problems.

This neighborhood meeting is just a first step in the development evaluation process. A Tenney-Lapham Neighborhood Association steering committee will now be formed and all have been encouraged to participate. JLA and TSA will present updated design changes at the next TLNA meeting scheduled for July 1, 2019.

37. 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).

Please see the attached HUD Form 92243 (final attachment in the file) which outlines our affirmative marketing strategy to be put into place upon the start of lease up.

38. 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.

TSA intends to advertise in the weekly Housing Resource Vacancy List produced by the Community Action Coalition for South Central Wisconsin and WIHousingSearch.org funded by Wisconsin Housing and Economic Development Authority (WHEDA). We will participate in listservs through the Homeless Services Consortium, Madison Neighborhood Resource Teams, and the Tenney-Lapham Neighborhood Association.

Other avenues to market to demographic groups that are least likely to apply include community minority programs such as the Catholic Multicultural Center in Madison, Centro Hispano of Dane County, the Family and Community Wellness program at Nehemiah Center for Urban Leadership Development, United Asian Services of WI, Inc., United Migrant Opportunity Services, and the Wisconsin Women of Color Network.

The following is a list of potential newspapers, media and telecommunications in which TSA could advertise vacancies at the Mifflin Street Apartments:

1. UMOJA Magazine
2. Madison365.com
3. The Madison Times Weekly
4. The Capital City Hues
5. Isthmus
6. Wisconsin State Journal
7. The Cap Times

All marketing materials and advertising will follow HUD marketing guidelines and Fair Housing Policy.

SITE AMENITIES

39. Describe the exterior and common area amenities that will be available to tenants and guests, including parking (and cost, if any).

Mifflin Street Apartments will provide a community room within the building. Exterior amenities include subsurface/covered parking, bicycle parking, as well as an outdoor playground available at the neighboring shelter site.

40. Describe the interior apartment amenities, including plans for internet service (and cost, if any) and a non-smoking environment.

Mifflin Street Apartments will include interior amenities including internet service and washer/dryers for all units, as well as refrigerator, oven/range, garbage disposal, window blinds, and television/cable connections. In addition, 12 integrated supportive housing units will be fully furnished with sofa, bed, dresser, kitchen table, bathroom linens, bedding, and all the kitchenware and utensils needed to cook and eat meals. The project will be a non-smoking facility, inside and outside of the building. There will be designated exterior smoking areas as part of the emergency shelter environment.

PROPOSAL TIMELINE

41. 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) [Target/Actual Month/Date]	5/31/2019
1 st Development Assistance Team/ Meeting (Due by 7/18/19) [Target/Actual Month/Date]	6/6/2019
1 st Neighborhood Meeting (Due by 8/9/19) [Target Month/Date]	6/6/2019

Activity/Benchmark	Estimated Month/Year of Completion
Submission of Land Use Application (Zoning Map Amendments Due by 9/25/19)	7/17/2019
Submission of Land Use Application (Permissively Zoned Due by 10/9/19)	N/A
Plan Commission Consideration (If Rezoning, Due by 11/25/19 for 12/3/19 Common Council)	9/16/2019
Urban Design Commission Consideration, if applicable [<i>Target Month/Date</i>]	7/17/2019
Application to WHEDA	11/2019
Complete Equity & Debt Financing	6/30/2020
Acquisition/Real Estate Closing	10/1/2019
Rehab or New Construction Bid Publishing	6/11/2020
New Construction/Rehab Start	11/1/2020
Begin Lease-Up/Marketing	9/1/2021
New Construction/Rehab Completion	1/31/2022
Certificates(s) of Occupancy Obtained	1/3/2022
Complete Lease-Up	5/1/2022
Request Final AHF Draw	6/1/2022

DEVELOPMENT TEAM

42. 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
Major Andrew Shiels	The Salvation Army	Developer	andrew.shiels@usc.salvationarmy.org	(608) 250-2203
Melissa Sorensen	The Salvation Army	Supportive Services	melissa.sorensen@usc.salvationarmy.org	(608) 250-2237
Joseph Lee	JLA Architects	Architect	jlee@jla-ap.com	(414) 988-7520
Jerry Burka	Gateway	Consultant	jerry.burka@orchardconsult.com	(314) 918-7608
Janice E. Hetland	Lathrop Gage	Attorney	jhetland@lathropgage.com	(314) 613-2860
TBD	TBD	Property Management		
TBD	TBD	General Contractor		

44. 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
The Salvation Army-Dane County	Developer	75%	22%
TBD	General Contractor		
TBD	Property Manager		
JLA Architects	Architect	14%	10%
The Salvation Army-Dane County	Service Provider	75%	22%

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

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

Name	Relationship	Email Address	Phone
John Kennedy	SLEF - Investor Partner	JohnKennedy@slefi.com	314-436-7810
John Wiechmann	MHEG-Investor Partner	JWiechmann@MHEGInc.com	402-334-8899
David Gevers	JLA-WHEDA project	dgevers@ejplesko.com	608-833-7600

HOUSING INFORMATION & UNIT MIX

46. 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:		601 East Mifflin Street, Madison, WI 53703					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%	0	6	6	0	0	0	473	563				
40%	0	0	0	0	0	0						
50%	0	6	7	0	0	0	773	923				
60%	0	5	7	0	0	0	913	1058				
LIHTC Sub-total	0	17	20	0	0	0	2159	2544				
Market*	0	0	7	0	0	0		1200				
Total Units	0	17	27	0	0	0	Notes:					

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

ADDRESS #2:		N/A					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%	0	0	0	0	0	0						
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 you will be portraying on your LIHTC application to WHEDA that 8 PBV units will be 50% CMI units, please include those on the "50%" row in the below table(s)). The City of Madison will enforce this income designation in your AHF Loan Agreement, if your proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.

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

48. Describe the number and percent of accessible units proposed for each of level of accessibility. For rehab, describe the accessibility modifications that will be incorporated into the existing housing.

All units will meet ANSO Type B level ADA accessibility. WHEDA awarded projects require 20% of the units to meet ANSI Type A level ADA accessibility; in accordance, nine (9) units of Mifflin Street Apartments will be fully accessible.

49. Please describe the sustainable, energy efficient, and/or green building design techniques and standards that will be incorporated into the proposed project (including, but not limited to, renewable ready, EV-ready, PV solar panels, tree planting, green roofs, reuse/repurposing of graywater, solar hot water, ground- or air sourced heat pumps, heat recovery ventilators, etc.). Identify any energy industry standards that will be achieved. Please describe how the housing project 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](#).

The project will commit to and utilize the Wisconsin Green Built Home program to achieve a minimum of 150 program points. Upon the engagement of the General Contractor, both the Architect and GC will collaboratively decide which green building design techniques are economically feasible for this project.

50. Estimate the resulting monthly, annual or life of project cost savings for the project and for tenants as a result of the implemented methods above.

Forecasting cost savings for the project and tenants at this time is not possible given that this is new construction and there are no comparables or historical records for cost expenditures of an existing rental apartment building.

51. Focus on Energy's (FOE) Design Assistance Program provides no-cost design consultation and assistance, including renewable energy analysis, e.g., solar readiness, and searches for incentives and/or rebates to fund the cost difference of the proposed building energy improvements. FOE compensates developers for the staff time dedicated to this process. Contact Barb Ohlsen, AIA, at (608) 709-1396 to discuss program details.

Would you be willing to apply for a renewable energy analysis and incorporate its recommendations where financially feasible? Yes No

52. 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.

Not applicable

53. Real Estate Project Data Summary

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:	601 East Mifflin Street, Madison, WI 53703								
	N/A	44	N/A	0	N/A	9			
Address:	Enter Address 2								
Address:	Enter Address 3								

54. 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.

This project will not be affected by any relocation. There are no current permanent residents at the site of the affordable apartment building. The Salvation Army shelter residents will be displaced during the time of demolition to the current shelter building as well as during construction. We are in the process of finalizing a relocation plan for emergency shelter. This may include the second floor of the QTI building for which the Salvation Army has an option to purchase, but we are also actively pursuing additional resources.

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 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.

NOTE: If a preliminary site plan is not available at the time of application, submittal will be required for DAT by mid-July. If the Capital Needs Assessment is not available at the time of application for a rehab project, submittal will be required by August 30, 2019.

APPLICANT & PROJECT NAME:

The Salvation Army / Mifflin Street Apartments

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:						
The Salvation Army	\$ 2,800,000	N	1.00%	40	40	Cash Flow
Subordinate Loan-Lender Name:						
Subordinate Loan-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
Not Applicable						
AHP Loan	\$ 900,000	N	0.00%	30	30	\$0
City-AHF Deferred Loan	\$ 500,000	N	0.00%	30	30	\$0
City-AHF Interest/Cash Flow Loan	\$ 500,000	Y	2.75%	16	30	\$24,494
City-TIF Loan	\$ -					
Other-Specify Lender/Grantor:						
Dane County WI / AHDF	\$ 1,250,000	N	0.00%	30	30	\$0
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 6,164,000					
Historic Tax Credit Equity	\$ -					
Deferred Developer Fees	\$ 400,000					
Owner Investment	\$ -					
Other-Specify:						
Total Sources	\$ 12,514,000					

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
The Salvation Army	\$ 8,000,000	5.00%	24 months
Bridge Loan-Lender Name:			
NONE			24
Tax Credit Equity:			
Limited Partner To Be Determined	\$ 1,863,400		
Total	\$ 9,863,400		

Estimated pricing on sale of Federal Tax Credits: **\$ 0.92**

Estimated pricing on sale of State Tax Credits: **\$ -**
(if applicable)

Remarks Concerning Project Funding Sources:

The estimated development budgets anticipate a request to WHEDA for a 9% LIHTC allocation of \$670,000, which at the estimated price of \$.92 would yield total equity of \$6,164,000. The general partner's contribution (\$600) and roughly 30% of the limited partner's contribution would be available during construction; the balance of the limited partner's contribution would be paid in installments following completion and at other post-completion milestones.

APPLICANT:

The Salvation Army

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$1,000,000
Existing Buildings/Improvements	\$0
Other (List)	
	\$0

Construction:	
Construction/Rehab Costs	\$7,119,770
Construction Profit	\$427,186
Construction Overhead	\$142,395
General Requirements	\$427,186
Construction Supervision	\$0
FF&E/Personal Property	\$0
Demolition	\$0
Site Work	\$0
Landscaping	\$0
Construction Contingency	\$711,977
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	\$224,898
Architect - Supervision	\$86,500
Engineering	\$45,000
Other (List)	
	\$0

Interim/Construction Costs	
Builder's Risk/Property Insurance	\$40,000
Construction Loan Interest	\$250,000
Construction Loan Origination Fee	\$0
Real Estate Taxes	\$20,000
Park Impact Fees	\$26,600
Other Impact Fees	\$0
Other (List)	
Lender/Investor Inspection	\$25,000

Financing Fees	
Cost of Bond Issuance	\$0
Permanent Loan Origination Fee	\$0
Other Permanent Loan Fees	\$0

Soft Costs	
Appraisal	\$7,500
Market Study	\$6,500
Environmental Reports	\$20,000
Survey	\$20,000

Permits	\$0
Lease-Up Period Marketing	\$0
Tax Credit Fees	\$0
Accounting/Cost Certification	\$35,000
Title Insurance and Recording	\$35,000
Relocation	\$0
FF&E	\$90,000
Capital Needs Assessment (if rehab)	\$0
Legal	\$75,000
Other (List)	
Site Plan Review	\$5,000
Fees:	
Bridge Loan Fees	\$0
Organizational Fees	\$0
Syndication Fees	\$0
Development Fee	\$1,200,000
Developer Overhead	\$0
Other Consultant Fees	\$0
Other (List)	
WHEDA LIHTC Fees	\$69,150
Reserves Funded from Capital:	
Lease-Up Reserve	\$45,000
Operating Reserve	\$125,000
Replacement Reserve	\$25,800
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$30,000
Other: (List)	
Soft Cost Contingency	\$178,538
TOTAL COSTS:	\$12,514,000

APPLICANT: The Salvation Army

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	417,420	425,768	434,284	442,969	451,829	460,865	470,083	479,484	489,074	498,856	508,833	519,009	529,389	539,977	550,777	561,792
Less Vacancy/Bad Debt	27,472	28,021	28,582	29,154	29,737	30,331	30,938	31,557	32,188	32,832	33,488	34,158	34,841	35,538	36,249	36,974
Income from Non-Residential Use*	38,400	39,168	39,951	40,750	41,565	42,397	43,245	44,110	44,992	45,892	46,809	47,746	48,700	49,674	50,668	51,681
Total Revenue	428,348	436,915	445,653	454,566	463,658	472,931	482,389	492,037	501,878	511,916	522,154	532,597	543,249	554,114	565,196	576,500
Expenses:																
Office Expenses and Phone	9,500	9,785	10,079	10,381	10,692	11,013	11,343	11,684	12,034	12,395	12,767	13,150	13,545	13,951	14,370	14,801
Real Estate Taxes	15,000	15,450	15,914	16,391	16,883	17,389	17,911	18,448	19,002	19,572	20,159	20,764	21,386	22,028	22,689	23,370
Advertising, Accounting, Legal Fees	12,500	12,875	13,261	13,659	14,069	14,491	14,926	15,373	15,835	16,310	16,799	17,303	17,822	18,357	18,907	19,475
Payroll, Payroll Taxes and Benefits	108,500	111,755	115,108	118,561	122,118	125,781	129,555	133,441	137,445	141,568	145,815	150,189	154,695	159,336	164,116	169,039
Property Insurance	19,000	19,570	20,157	20,762	21,385	22,026	22,687	23,368	24,069	24,791	25,534	26,300	27,089	27,902	28,739	29,601
Mtc, Repairs and Mtc Contracts	30,000	30,900	31,827	32,782	33,765	34,778	35,822	36,896	38,003	39,143	40,317	41,527	42,773	44,056	45,378	46,739
Utilities (gas/electric/fuel/water/sewer)	28,400	29,252	30,130	31,033	31,964	32,923	33,911	34,928	35,976	37,056	38,167	39,312	40,492	41,706	42,958	44,246
Property Mgmt	23,500	24,205	24,931	25,679	26,449	27,243	28,060	28,902	29,769	30,662	31,582	32,529	33,505	34,511	35,546	36,612
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	13,200	13,596	14,004	14,424	14,857	15,302	15,761	16,234	16,721	17,223	17,740	18,272	18,820	19,385	19,966	20,565
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
Asset Management Fee	7,500	7,725	7,957	8,195	8,441	8,695	8,955	9,224	9,501	9,786	10,079	10,382	10,693	11,014	11,344	11,685
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Operating Expenses	267,100	275,113	283,366	291,867	300,623	309,642	318,931	328,499	338,354	348,505	358,960	369,729	380,821	392,245	404,013	416,133
Net Operating Income	161,248	161,802	162,287	162,699	163,034	163,289	163,458	163,538	163,524	163,411	163,194	162,868	162,428	161,868	161,183	160,367
Debt Service:																
First Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
TSA 1st Mortgage Interest	28,000	28,000	28,000	28,000	27,619	26,510	25,387	24,252	23,104	21,944	20,775	19,596	18,408	17,212	16,011	14,804
TSA 1st Mortgage Principal	0	0	0	38,060	110,921	112,285	113,577	114,792	115,926	116,973	117,925	118,778	119,526	120,162	120,678	121,069
Total Debt Service	28,000	28,000	28,000	66,060	138,540	138,795	138,964	139,044	139,030	138,917	138,700	138,374	137,934	137,374	136,689	135,873
Total Annual Cash Expenses	295,100	303,113	311,366	357,927	439,163	448,437	457,895	467,543	477,384	487,422	497,660	508,103	518,755	529,619	540,702	552,006
Total Net Operating Income	133,248	133,802	134,287	96,639	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	108,754	109,308	109,793	72,145	0	0	0	0	0	0	0	0	0	0	0	0
Cash Flow	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494
AHF City Interest Loan	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494

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

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DCR Hard Debt																
DCR Total Debt	3.07	3.08	3.09	1.80	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00

Assumptions

Vacancy Rate	6.6%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

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

APPLICANT:

The Salvation Army

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	573,028	584,489	596,179	608,102	620,264	632,669	645,323	658,229	671,394	684,822	698,518	712,489	726,738	741,273
Less Vacancy/Bad Debt	37,713	38,467	39,237	40,022	40,822	41,638	42,471	43,321	44,187	45,071	45,972	46,892	47,829	48,786
Income from Non-Residential Use*	52,715	53,769	54,845	55,942	57,060	58,202	59,366	60,553	61,764	62,999	64,259	65,544	66,855	68,192
Total Revenue	588,030	599,791	611,786	624,022	636,503	649,233	662,217	675,462	688,971	702,750	716,805	731,141	745,764	760,680
Expenses:														
Office Expenses and Phone	15,245	15,702	16,173	16,658	17,158	17,673	18,203	18,749	19,312	19,891	20,488	21,102	21,735	22,387
Real Estate Taxes	24,071	24,793	25,536	26,303	27,092	27,904	28,742	29,604	30,492	31,407	32,349	33,319	34,319	35,348
Advertising, Accounting, Legal Fees	20,059	20,661	21,280	21,919	22,576	23,254	23,951	24,670	25,410	26,172	26,957	27,766	28,599	29,457
Payroll, Payroll Taxes and Benefits	174,111	179,334	184,714	190,255	195,963	201,842	207,897	214,134	220,558	227,175	233,990	241,010	248,240	255,687
Property Insurance	30,489	31,404	32,346	33,317	34,316	35,346	36,406	37,498	38,623	39,782	40,975	42,204	43,471	44,775
Mtc, Repairs and Mtc Contracts	48,141	49,585	51,073	52,605	54,183	55,809	57,483	59,208	60,984	62,813	64,698	66,639	68,638	70,697
Utilities (gas/electric/fuel/water/sewer)	45,574	46,941	48,349	49,800	51,294	52,832	54,417	56,050	57,731	59,463	61,247	63,085	64,977	66,926
Property Mgmt	37,711	38,842	40,007	41,207	42,444	43,717	45,028	46,379	47,771	49,204	50,680	52,200	53,766	55,379
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	21,182	21,818	22,472	23,146	23,841	24,556	25,293	26,051	26,833	27,638	28,467	29,321	30,201	31,107
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)	12,035	12,396	12,768	13,151	13,546	13,952	14,371	14,802	15,246	15,703	16,174	16,660	17,159	17,674
Total Expenses	428,617	441,476	454,720	468,361	482,412	496,885	511,791	527,145	542,959	559,248	576,026	593,306	611,105	629,439
Net Operating Income	159,413	158,315	157,067	155,661	154,090	152,348	150,426	148,317	146,012	143,502	140,780	137,835	134,659	131,241
Debt Service:														
First Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)	13,593	12,380	11,166	9,952	8,740	7,531	6,328	5,132	3,945	2,769	1,607	460	0	0
TSA 1st Mortgage Interest	121,326	121,441	121,407	121,215	120,856	120,323	119,604	118,691	117,573	116,239	114,679	45,974	0	0
TSA 1st Mortgage Principal	134,919	133,821	132,573	131,167	129,596	127,854	125,932	123,823	121,518	119,008	116,286	46,434	0	0
Total Debt Service	134,919	133,821	132,573	131,167	129,596	127,854	125,932	123,823	121,518	119,008	116,286	46,434	0	0
Total Annual Cash Expenses	563,536	575,297	587,293	599,528	612,008	624,739	637,723	650,968	664,477	678,256	692,312	706,740	721,505	736,659
Total Net Operating Income	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494
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	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	91,401	134,659	131,241
AHF City Interest Loan	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494

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

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DCR Hard Debt														
DCR Total Debt	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.94	5.50	5.36

Assumptions

Vacancy Rate	6.6%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

MIFFLIN STREET APARTMENTS DEVELOPMENT TEAM EXPERIENCE & CAPACITY

Introduction to The Salvation Army

There are two Salvation Army corporations that will be engaged on the Mifflin Street Apartments project, both of which are Illinois non-profit corporations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code. These two corporations are The Salvation Army and The Salvation Army Services, Inc. The boards of directors, including all officers and members, are identical for both corporations; and the articles and by-laws of both corporations are largely the same. The Salvation Army, an Illinois Corporation – the older, larger, and more experienced corporation – will serve as sponsor, developer and guarantor. The Salvation Army Services, Inc., which was specifically created to participate in projects like Mifflin Street Apartments – will serve as general partner of the limited partnership that will own the project.

The Salvation Army as an organization was originally founded in 1865 in the slums of London, England by William and Catherine Booth, and began operations in Wisconsin in the 1880's. The organization's mission is to meet human needs in the name of Jesus Christ without discrimination, and presently in the United States provides services to over 30 million people a year through about 8,000 centers of operation. The Salvation Army was described by management theorist Peter Drucker as "by far the most effective organization in the U.S. No one even comes close to it in respect to clarity of mission, ability to innovate, measurable results, dedication and putting money to maximum use" (*Forbes*, August 11, 1997).

The Salvation Army, Inc., an Illinois non-profit corporation, is in charge of all programs and operations of The Salvation Army in its Central Territory of the U.S., which comprises an 11-state region including Wisconsin and Michigan. The Central Territory is headquartered in Hoffman Estates, Illinois, has over 13,000 employees and total assets of more than \$2.5 billion. Over the past 40 years, the Central Territory has developed approximately 1,000 units of multifamily rental housing utilizing a wide variety of financing tools including LIHTC, HUD 202/811, and HOME, FHLB AHP and other State and local gap financing programs.

A complete list of those multifamily rental housing developments is attached.

The Central Territory has also closed on five NMTC allocations, which have been used to finance mainly non-housing community service centers. Finally, the Central Territory owns and operates a number of homeless and emergency shelters, child & adult day care centers and adult substance abuse rehabilitation centers throughout the 11-state region, most of which were substantially financed with capital campaigns over the years. Within the Central Territory, there are 10 different divisions that more directly operate and administer day-to-day activities in the facilities and programs located within each division. The Salvation Army of Dane County is within the Wisconsin & Upper Michigan Division which is headquartered in Milwaukee.

The Salvation Army of Dane County will implement the case-managed supportive services for Mifflin Street Apartments. Along with the single women's and emergency family shelter, The Salvation Army of Dane County currently manages six housing programs and a diversion

program, which seeks to quickly house families and women experiencing homelessness so that they can avoid entering the emergency shelter. The other programs, known as Holly House, Rapid Rehousing, House-ability, RISE, Pathway of Hope and DAWNS, all seek to provide support and assistance to single women and families as they seek to move from homelessness to permanent housing. A wide range of facilities and services are provided through the programs. The Salvation Army collaborates with other local non-profits, such as the YWCA, United Way, The Road Home to coordinate with private landlords and local leasing agencies to best meet the individual needs of the women and families who seek homelessness assistance through The Salvation Army of Dane County.

Individual Development Team Members

Several key team members have been selected by The Salvation Army for the development of Mifflin Street Apartments, including JLA Architects, as project architect; Lathrop & Gage, as tax credit legal counsel; and Gateway Community Development Fund, Inc., as development and financing consultant, each of which has substantial experience developing affordable housing.

(The Salvation Army is presently soliciting and will be selecting additional professionals to complete its development team for Mifflin Street Apartments, including: third party property management, general contractor, local legal counsel, specialized accounting, and title insurance and disbursing agent. The Salvation Army expects that its team will be fully on board well before it submits the project's LIHTC application to WHEDA near the end of 2019.)

Specific Responses to AHF Experience and Capacity Criteria

Page 12 of the City of Madison CDD RFP includes eight (8) categories or criteria for assessing development team experience. The Salvation Army's response to each is outlined as follows:

a. Experience Developing Multifamily Housing

Over the past 40 years, The Salvation Army Central Territory has developed approximately 1,100 units of affordable, multifamily housing which are spread among seven of the Territory's eleven states. The total development cost for the housing facilities was approximately \$90 million, which was provided through a variety of public and private sources and, in many of the projects, funding provided directly by the Central Territory. This includes about 500 units of supportive housing for seniors financed through the HUD Section 202 program, and 424 housing units in seven (7) projects that have obtained and utilized LIHTC credits. Completed between 2001 and 2016, those LIHTC projects are located in Minnesota, Indiana, Missouri and Nebraska. Most of the seven LIHTC projects also incorporated other federal, state and local funding resources or gap financing, which prominently include HOME/CDBG funds, Federal Home Loan Bank AHP funding and a variety of state and local affordable trust funding. Additionally, the projects have also utilized Federal and in the case of the projects in Missouri, State historic tax credit equity. The 3010 Apartment project in St. Louis, for example, used a combination of Federal and State LIHTC and historic tax credit equity to finance the majority of its \$12.6 million total development cost.

The Salvation Army continues to own and operate each of the projects that it has developed, which are included on the attached list.

b. Participating in Public/Private Joint Ventures

Over the past twenty years or so and with the advent of the use of various tax credits as the foundation of the financing for many affordable housing and community service facilities, The Salvation Army has increasingly utilized public/private joint ventures for its developments. For each of its LIHTC projects, for example, it created for-profit limited partnerships in which the Army, through The Salvation Army Services, Inc. has acted as the general partner but has utilized various private entities as the investor and limited partner participant. For example, The Salvation Army has worked with and entered into joint venture agreements with National Equity Fund, Midwest Housing Equity Group, Cinnaire and the St. Louis Equity Fund for several of its LIHTC projects. Joint venture agreements have also included two direct investments from individual banks, one in Missouri and the other in Nebraska.

In addition to public/private participation on its LIHTC development, The Salvation Army Central Territory has also closed on several New Markets Tax Credit (NMTC) projects, which have primarily been used to finance community service centers. To facilitate the NMTC investment, the Army has created joint ventures with private entities in each project, with the participation mainly coming from large banks, including, for example, with U. S. Bank and Chase Bank.

c. Years in Existence and Staff Experience

The Salvation Army Central Territory of the U.S. has been in existence since the late 1800's and operates 10 Divisions within its 11-state region that includes the Wisconsin and Upper Michigan Division. The Central Territory is headquartered in Hoffman Estates, Illinois, and has over 13,000 employees. The Salvation Army has a wide variety of qualified and capable staff that will be utilized during each phase of the development, construction and operation of the proposed project. This will include staff at the Territory, Division (located in Milwaukee) and the local office located in Madison, The Salvation Army of Dane County.

Staff at Territory will provide overall guidance and financial/administrative support for the project. For example, a key staff member at the Central Territory is Bram Higgins, who is the corporate secretary and general counsel. Bram has been with the Central Territory for about 12 years and has been intimately involved in each LIHTC and NMTC project developed within the Territory over that time. An attorney, Bram was previously general counsel for the Missouri Housing Development Commission, the State's housing finance agency. During that time, Bram facilitated the financing and closing of several thousands of affordable housing units throughout the State.

d. Financial Capacity to Secure Financing and Complete Project

The Salvation Army, Inc. has total assets of more than \$2.5 billion and has significant financial capacity to secure the financing for and complete and operate the proposed project. As it has done on all its other LIHTC projects, The Salvation Army plans to provide direct construction and permanent financing for project. It will also provide all financial guarantees required by the private investor.

For its last four LIHTC projects, for example, The Salvation Army provided about \$40 million in construction financing that with the completion of those projects has been converted into long-term, low rate financing in the amount of about \$9.1 million.

e. Developer's Experience with Integrated Support Housing Units

Each of the projects that has been developed and are still being operated by The Salvation Army have some level of supportive services available on-site for residents. The level and intensity of the services varies based on the purpose and intent of each project. For example, the purpose of the HUD Section 202 facilities is to provide supportive services that will allow seniors to live as independently as possible. The Army does this by providing a service coordinator at each of its 202 facilities who works with the tenants to bring needed services to the facility and develops and implements social, recreational and transportation programming. Several of its LIHTC projects primarily serve as workforce housing resources. For example, with the historic rehabilitation and conversion of the Railton Residence building in St. Louis from hotel-style units to regular apartments, the goal was to provide a high quality and affordable alternative for low income service workers for downtown offices and commercial places that were beginning to be crowded out by a significant level of up-scale market rate housing development in the area at the time. Supportive services mainly focus on assisting residents with job-search and other related employment activities. At the other end of the spectrum is the Veteran's Residence, a 48-unit development in St. Louis that serves veterans and others who are moving from homelessness to self-sufficiency. Although preference is given to veterans, all individuals in need of supportive services are welcome. Community amenities include a community room, computer lab, library and laundry room. Residents receive ongoing supportive services while living at the property, which include substance abuse counseling, life skills classes, health services, transportation services, housing assistance and employment services.

f. Experience of Proposed Property Management Entity

The Salvation Army is the process of selecting the 3rd party management agent for Mifflin Street Apartments and expects that this process will be completed with the final determination and selection of the agent by the end of July 2019. The Salvation Army is

using WHEDA's current list of approved management agents as the starting point for its process. Other important criteria that will factor into the selection process include, but are not limited to, experience with and knowledge of the local rental market, experience working with supportive service providers, experience managing affordable facilities employing "housing first" models and management fee and cost proposals.

Most of the affordable rental facilities that have been sponsored and developed by The Salvation Army (which are provided on the attached list) have 3rd party managers running the day-to-day operations of the facilities pursuant to management agreements with each respective ownership entity. For example, McCormack Baron Salazar manages the three affordable facilities located in St. Louis, MO, with the agent providing all day-to-day management and maintenance services. The local Army representatives provide asset management functions and monitoring of McCormack Baron while providing case-management and supportive services, as needed and as programmed, and coordinating all such services with the management agent. The Salvation Army anticipates such a relationship with the management agent that it will select for the Mifflin Street Apartments project.

g. Architectural / Service / Green Building Certifications or Awards

The Salvation Army received two historic preservation awards for its rehabilitation and conversion of the former Harbor Light facility in St. Louis into the 58-unit 3010 Apartments project. A centerpiece of its 5-phase, \$50 million Midtown Campus, the project entailed the conversion of the Harbor Light, Midland Division's emergency shelter, into an affordable housing facility and utilized a combination of Federal and State LIHTC and historic rehabilitation credits. The combination of the various funding sources was a significant challenge for the development and the awards recognize the Army's efforts to not only preserve historic structures important to the local community but the innovative way in which it converted a building previously used as an emergency shelter into a facility that provides housing in concert with the new housing first model.

In 2015, the St. Louis Landmarks Association recognized The Salvation Army's 3010 Apartments Project with an Historic Preservation Most Enhanced Award. The project also received the National Trust for Historic Preservation's 2015 HUD Secretary's Award for Excellence in Historic Preservation. The entry in the National Trust for Historic Preservation's archives reads in part:

The 2015 National Trust/HUD Secretary's Award for Excellence in Historic Preservation was presented at the 2015 National Preservation Conference in Washington, D.C. on November 6, 2015 to the 3010 Apartments Limited Partnership for rehabilitating and transforming a historic home for orphaned and abandoned boys into affordable housing.

The Award for Excellence in Historic Preservation recognizes efforts that both advance the Nation's historic preservation goals and provide affordable housing and economic development opportunities for low- and moderate-income residents. Listed in the National Register of Historic Places as Father Dunne's News Boys' Home and Protectorate, the home was established in 1906 by Father Peter Joseph Dunne at

3010 Washington Avenue, St. Louis, Missouri. In 1907, the 3-story home with an attached two-story chapel over an institutional kitchen and a detached laundry building were completed. The facility was enlarged substantially in 1911 by a 3-story addition at the protectorate's east end. For over 100 years, this historic building complex provided shelter and care to the homeless, initially for orphaned and abandoned boys, and after the Salvation Army renovated it in 1970 as the Harbor Light Center, the facility served people affected by addiction, chronic homelessness and various disabilities.

The recent historic rehabilitation of the building complex, now known as 3010 Apartments, converted the existing barracks-like institutional housing into 58 one-bedroom, private residential apartments for low- to very low-income adult residents, with preference given to veterans and the disabled, especially the homeless. Rehabilitation was accomplished without drastically altering the interiors and retained several historic elements, such as the main entry and its broad staircase. The building complex's many stained glass windows, including those in private apartments, were also repaired and retained. The original hallways were preserved along with the rhythm of historic millwork: chair rails and slightly recessed, transomed wood paneled doors that now serve as entrances to many of the apartments. Additionally, the reception room, which contains columns and elaborate plaster moldings, was restored to its original appearance and is now used a communal lounge for residents.

h. Project Organizational Chart

The preliminary organizational chart for the proposed project is attached.

MULTIFAMILY DEVELOPMENT EXPERIENCE SUMMARY

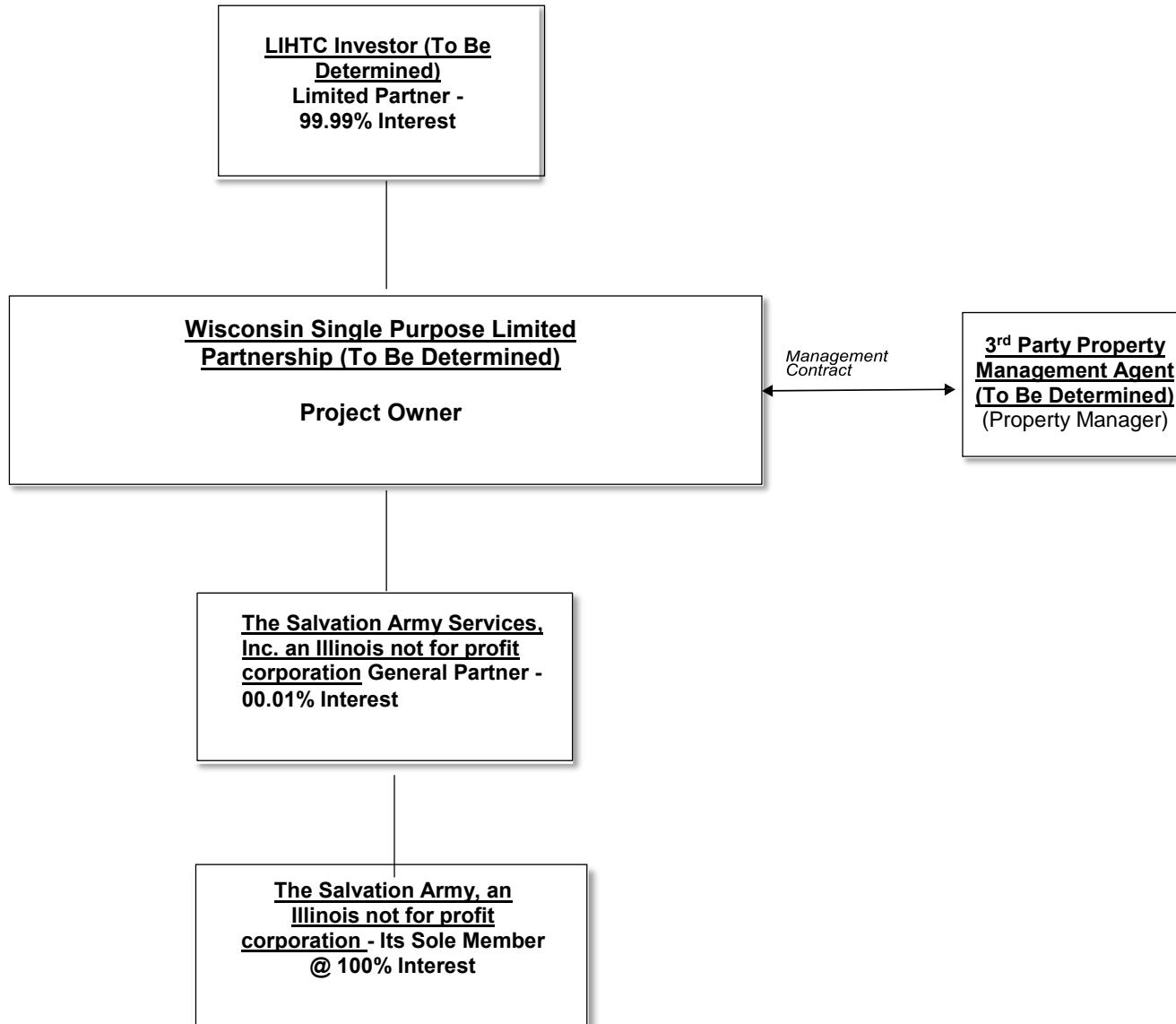
The Salvation Army, an Illinois non-profit corporation
5550 Prairie Stone Parkway
Hoffman Estates, IL 60192

1-Jun-19

Role in Prior Developments: Developer Sole Member / GP Property Manager (where indicated)

Development Name City, State	Date Acquired or Constructed	Unit Count			Financing Sources/ Government Programs	Current Occup. %	Participation Period		Current Property Management Agent
		Low Income	Market	Special Need			From:	To:	
Booth Manor; Minneapolis, MN	1977	156	1	0	HUD FHA Mtge, HAP	95-100%	1977	Current	Hayes Gibson
Booth Manor; Grandview, MO	1981	51	1	0	HUD Section 202, HAP	95-100%	1981	Current	
Booth Manor; Chicago, IL	1990	57	0	0	HUD Section 202, HAP	95-100%	1990	Current	Hayes Gibson
Booth Manor, Kansas City, KS	1990	35	1	0	HUD Section 202, HAP	95-100%	1990	Current	
Booth Manor, Oak Creek, WI	1993	40	1	0	HUD Section 202, HAP	95-100%	1993	Current	
Booth Manor, Indianapolis, IL	1994	75	0	0	HUD Section 202, HAP	95-100%	1994	Current	Hayes Gibson
Durham Booth Manor, Omaha, NE	1997	48	1	0	HUD Section 202, HAP	95-100%	1997	Current	
Booth Manor II, Oak Creek, WI	1997	40	1	0	HUD Section 202, HAP	95-100%	1997	Current	
Carpenter Apartments, Indianapolis, IN	2001	51	1	0	HUD Section 202, HAP	95-100%	2001	Current	Hayes Gibson
Booth Manor, St. Louis, MO	2001	74	1	0	HUD Section 202, PRAC	95-100%	2001	Current	
Hope Harbor, Minneapolis, MN	2001	96	0	0	LIHTC, HOME, CDBG	95-100%	2001	Current	Hayes Gibson
Booth Manor, Columbus, IN	2002	20	0	0	HUD Section 202, PRAC	95-100%	2002	Current	Hayes Gibson
Barton Center, Indianapolis, IN	2006	37	0	0	LIHTC	95-100%	2006	Current	Hayes Gibson

Mifflin Street Apartment
Preliminary Organizational Chart – June 2019





Brian Peddle
General

Commissioner Brad Bailey
Territorial Commander

Major Steven J. Merritt
Divisional Commander

Captain Andrew Shiels
Dane County Coordinator
Madison Temple Corps Officer
Captain Melissa Shiels
Dane County Director of Special Services
Madison Temple Corps Officer
Lieutenant Kelly Summit
Madison Temple Associate Corps Officer
Majors Bruce and Betty Keobounhom
Madison Genesis Corps Officers

June 17, 2019

City of Madison Community Development Division
215 Martin Luther King, Jr. Blvd., Suite 300

Affordable Housing Fund
Madison, WI 53703-3348

Re: Supportive Services for Mifflin Street Apartments

The Salvation Army of Dane County, as a current service provider and participant in the Madison area's Continuum of Care, will provide residents of TSA's LIHTC property, tentatively named "Mifflin Street Apartments", with comprehensive, case-managed supportive services.

Twelve (12) of the units will be designated as units for the Homeless Services Consortium and its housing placement system using the community by-name housing list. TSA will offer these residents voluntary, on-site case-managed supportive services. The services to which residents will have access include:

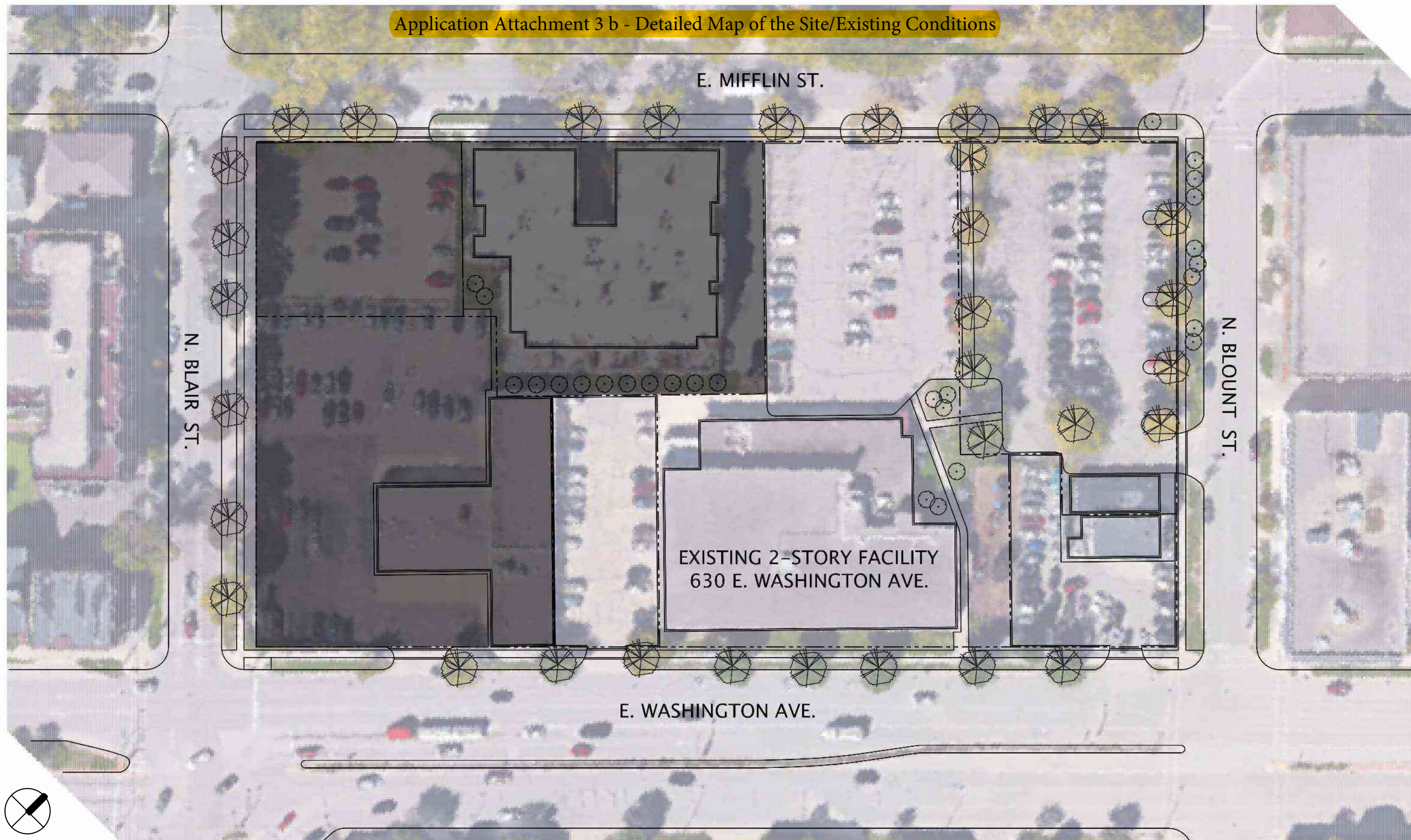
- needs assessment and comprehensive housing focused case management
- adult basic and vocational education, including basic computer skills
- life skills training
- dental services (clinic on site)
- medical services (clinic on site)
- mental health services (clinic on site)
- support group meetings
- benefits advocacy
- employment services and help with transportation services
- recreational opportunities
- legal services
- veterans' services
- financial skills training and credit counseling, and income support, as needed

On behalf of The Salvation Army-Dane County, we hereby agree to provide the services stated above.

Sincerely,

Melissa Sorensen, MSW, APSW
Social Services Executive Director
630 E Washington Ave
Madison, WI 53703
608.250.2237

Major Andrew Shiels
Capital Area Coordinator
3030 Darbo Drive
Madison, WI 537114
608.250.2203



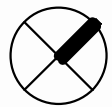
EXISTING 2-STORY FACILITY
630 E. WASHINGTON AVE.

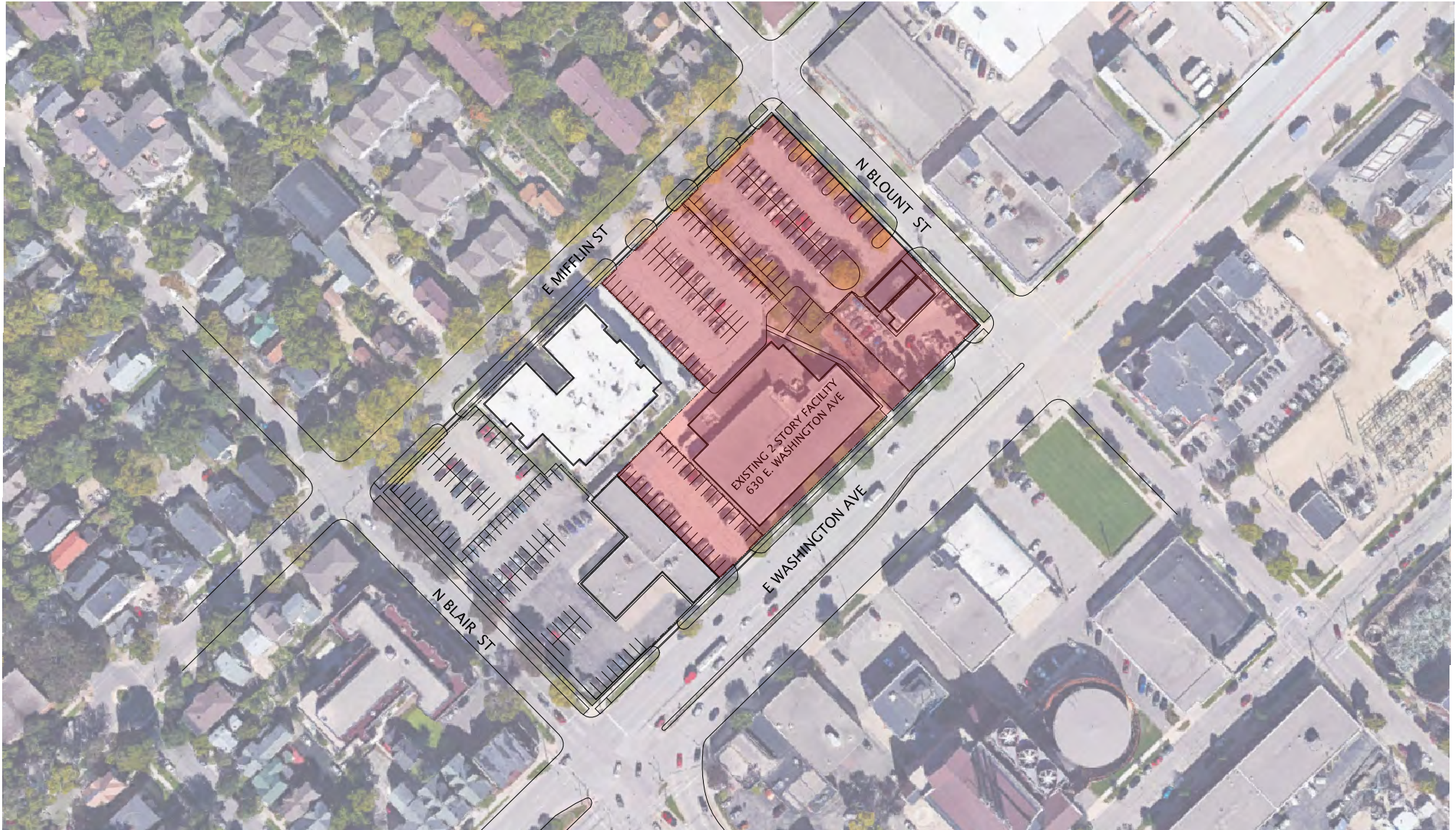
N. BLAIR ST.

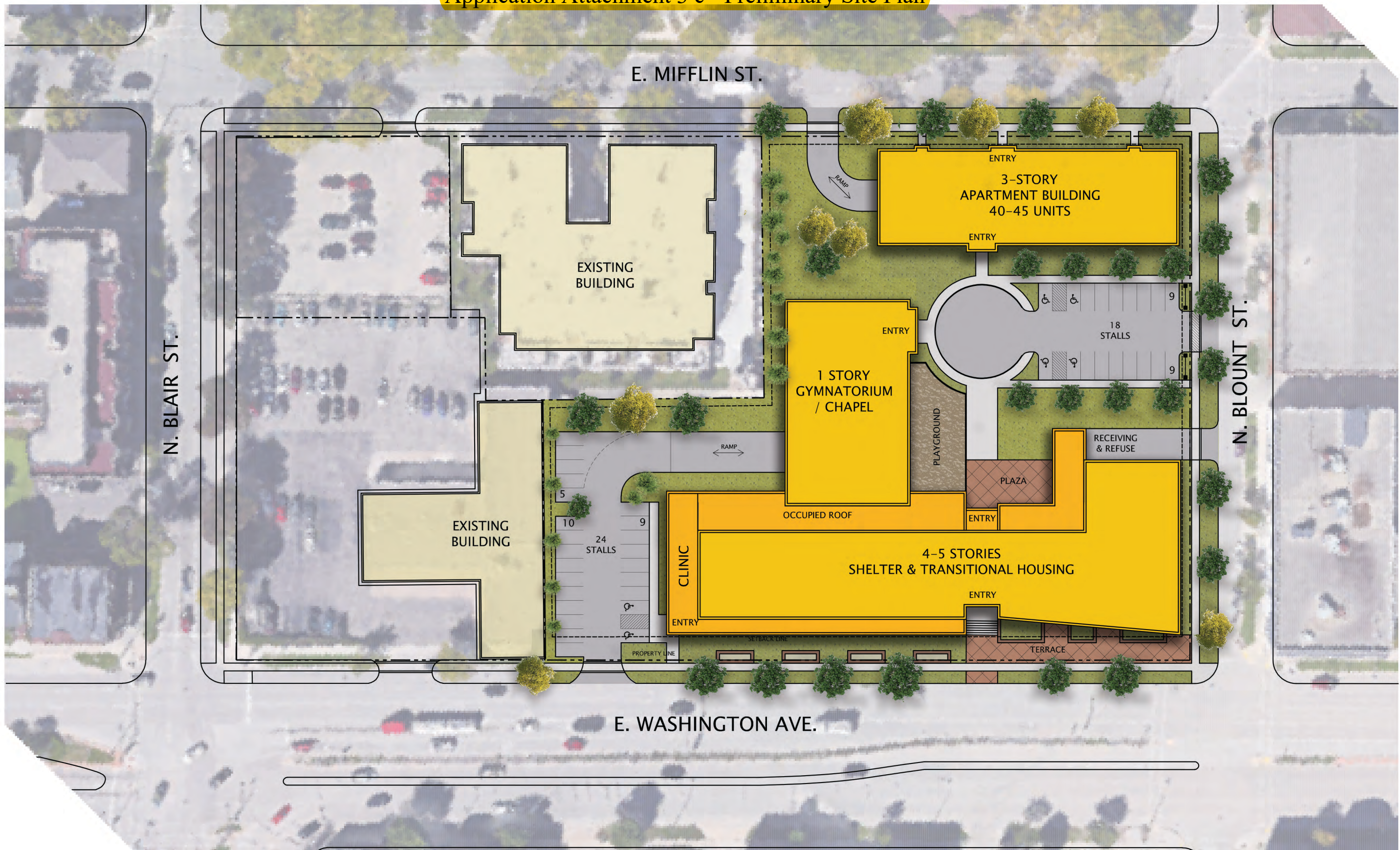
E. MIFFLIN ST.

N. BLOUNT ST.

E. WASHINGTON AVE.







Note to all applicants/respondents: This form was developed with Nuance, the official HUD software for the creation of HUD forms. HUD has made available instructions for downloading a free installation of a Nuance reader that allows the user to fill-in and save this form in Nuance. Please see <http://portal.hud.gov/hudportal/documents/huddoc?id=nuancereaderinstall.pdf> for the instructions. Using Nuance software is the only means of completing this form.

**Affirmative Fair Housing
Marketing Plan (AFHMP) -
Multifamily Housing**

**U.S. Department of Housing
and Urban Development
Office of Fair Housing and Equal Opportunity**

OMB Approval No. 2502-0608
(exp.04/30/2020)

1a. Grantee Name & Address (including City, County, State, Zip Code, Telephone No. & email address)	1b. Rental Assistance Contract Number
	1c. No. of Units

1d. Entity Responsible for conducting Outreach and Referral (check all that apply)

Grantee Service Provider Other (specify)

Entity Name, Contact Person and Position (if known), Address (including City, County, State & Zip Code), Telephone Number & Email Address

1e. If the outreach is performed by any other entity other than the Grantee, explain how the Grantee will monitor their activities to ensure compliance with affirmative fair housing outreach requirements. Enter "N/A" in the field below if not applicable.

1f. To whom in the Grantee's office should approval and other correspondence concerning this AFHMP be sent? Indicate Name, Address (including City, State & Zip Code), Telephone Number & E-Mail Address.

2a. Affirmative Fair Housing Marketing Plan

Plan Type

Date of the First Approved AFHMP:

Reason(s) for current update:

2b. Outreach Start Date

Grantees should not begin accepting applications prior to conducting the marketing and outreach activities identified in the approved AFHMP.

Date Outreach will begin (xx/xx/xxxx)

Date Grantee will begin accepting applications (xx/xx/xxxx)

Note: Only Fiscal Year 12 Demonstration Grantees are permitted to accept applications prior to conducting marketing and outreach activities identified in the approved AFHMP.

3a. Target Areas (check one):

Statewide

Other (specify)

3b. Target Population(s)

3c. Is all or some of the Target Population(s) covered by a Settlement Agreement? **No** **Yes**

3d. Demographics of Target Population(s)

(check all that apply)

White

American Indian or Alaska Native

Asian

Black or African American

Native Hawaiian or Other Pacific Islander

Hispanic or Latino

Families with Children (under age 18)

Other ethnic group, religion, sex, etc. (specify)

3e. Data Source(s) used to obtain the demographic characteristics.

4a. Identify the demographic group in the target population(s) that are least likely to apply.

4b. For each demographic group in the target population(s) that are least likely to apply, provide a description of how the program will be marketed to eligible individuals in the target population(s).

5a. Fair Housing Poster

The Fair Housing Poster must be prominently displayed in all offices/locations in which rental activity takes place (24 CFR 200.620(e)). Check below all locations where the Poster will be displayed.

Rental Office Grantee Office Model Unit Other (specify)

5b. Affirmative Fair Housing Marketing Plan

The AFHMP must be available for public inspection at all rental offices/locations (24 CFR 200.625). Check below all locations where the AFHMP will be made available.

Rental Office Grantee Office Model Unit Other (specify)

5c. Project Owner Compliance to display Fair Housing Poster and the AFHMP

Explain how you will ensure that every project owner will prominently display the Fair Housing Poster and AFHMP.

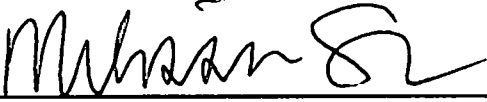
6. Evaluation of Marketing Activities

Explain the evaluation process you will use to determine whether your outreach activities have been successful in attracting individuals in the target population(s) who are least likely to apply, including who will be responsible for conducting this evaluation, when this evaluation will be conducted and how the results of this evaluation will inform future marketing activities.

7. Additional Considerations. Is there anything else you would like to tell us about your AFHMP to help ensure that your program is marketed to eligible persons in the target population(s) who are least likely to apply for the program? Please attach additional sheets, as needed.

8. Review and Update

By signing this form, the grantee agrees to implement its AFHMP, and to review and update its AFHMP in accordance with the instructions to item 8 of this form in order to ensure continued compliance with HUD's Affirmative Fair Housing Marketing Regulations (see 24 CFR Part 200, Subpart M). The Grantee also certifies that training will be provided to staff/entities that provide outreach to target population(s) for the purpose of enrollment in the 811 PRA program. Training will consist of affirmative fair housing outreach requirements and the Fair Housing Act, Section 504 of the Rehabilitation Act, Title VI of the Civil Rights Act and the American with Disabilities Act. I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. Warning: HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (See 18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802).



6/20/19

Signature of person submitting this Plan & Date of Submission (mm/dd/yyyy)

Melissa Sorensen

Name (type or print)

Social Services Executive Director, The Salvation Army of Dane County

Title & Name of Company

For HUD-Office of Housing Use Only

Reviewing Official:

[Empty box for Reviewing Official signature]

Signature & Date (mm/dd/yyyy)

[Empty box for date]

For HUD-Office of Fair Housing and Equal Opportunity Use Only

Approval

Disapproval

Signature & Date (mm/dd/yyyy)

[Empty box for date]

Name
(type or print)

[Empty box for name]

Name

Title

[Empty box for title]

Name
(type or print)

[Empty box for name]

Title

[Empty box for title]

The Salvation Army TSA Mifflin Street Apartments

Response Submission Due Date: August 8, 2019 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

- 1. Your development team attended an informational presentation with the Urban Design Commission on July 17, 2019. That commission is an approving body related to the physical design of the development. Please provide a summary of any potential modifications you are considering to address points raised by the Commission at that meeting.**

The feedback received at the July 17, 2019 UDC meeting was a request for additional information regarding site security, and context case studies from other successful shelter projects in the United States.

The Salvation Army is currently working on a site security operations plan which will be presented at future UDC, neighborhood, and city committee meetings.

We have traveled to Minneapolis to study two new shelters that have been built there by Catholic Charities. We have also been working with the national office of the Salvation Army regarding shelters that have been built by the Salvation Army around the United States. The goal is to understand their lessons learned in order to incorporate the most successful design practices into our project. These items will be presented at future UDC, neighborhood, and city committee meetings.

- 2. Please provide an update on the Traffic Study referenced during your DAT presentation, as requested by Traffic Engineering.**

We have been in contact with the City of Madison Traffic Engineering department regarding their requirements, and analysis requirements. We are working on obtaining proposals from qualified firms recommended by the City of Madison Traffic Engineering department to perform the traffic study analysis. We hope to execute the analysis in the next 30 days.

- 3. Please provide an update on TLNA Steering Committee process and modifications you are considering because of the process thus far.**

We met with the TLNA Steering Committee on July 1, 2019. The committee has voiced concerns regarding current issues within The Salvation Army parking lot. The Salvation Army had a security assessment completed on July 10, 2019. TSA met with The Beacon on July 25, 2019 to gather strategies about their neighborhood policies. We met with the neighborhood police officers on July 30, 2019 to gather some ideas to improve security and safety. TSA is now working on a Neighborhood Policy for the guests.

The steering committee also expressed concerns regarding the building placement and the increased use on E Mifflin. The design was modified and the building will be altered to accommodate this concern.

Unit Mix

- 1. Do you plan to use an income averaging approach in your unit mix?**

No, currently there are no plans to use the income averaging approach.

Supportive Housing Units/Supportive Housing Partnerships

- 1. For the 12 Supportive Housing Units (SHUs), reference is made to these individuals coming from the Prioritized/By-Name List and also being currently homeless or at-risk of homelessness. By definition, individuals coming from the Prioritized/By-name List are currently homeless and not merely at-risk of homelessness. Please confirm TSA's intention to serve individuals coming from the Prioritized/By-Name List who are currently homeless.**

The Salvation Army is committed to serving those individuals who are currently homeless and coming from the Prioritized/By-Name List.

- 2. Would TSA consider making all utilities included in rent for the 12 SHUs?**

Yes, that is an important adjustment that will be made in the operating projections.

Feasibility/Financials

- 1. Does the land cost include sale or transfer of the existing Salvation Army property to the to-be-formed limited partnership entity or only the newly controlled Schlimgen properties. If the latter, will that change?**

The property on which the proposed project will be developed currently consists of two existing parcels that will be consolidated. The consolidated parcels will be subdivided to form 1) the project site and 2) the proposed emergency shelter facility. One of the existing parcels is currently owned by The Salvation Army; the other is one of the

Schlimgen parcels which is currently controlled by The Salvation Army through a real estate sales contract.

When the subdivision is completed the project's parcel will be transferred to the to-be-formed ownership entity.

The Salvation Army will commission an as-is appraisal of the parcel on which the LIHTC project will be built to determine the final acquisition cost. The budgeted acquisition cost has been determined based on a recent appraisal of the property currently owned by The Salvation Army plus the sales prices of the Schlimgen parcels.

2. How will The Salvation Army protect future tenants from rapidly rising contract rents allowed by WHEDA? Will TSA have any internal structures to limit rent increases for lease renewals?

The Salvation Army intends to develop and operate the proposed project to provide the highest quality apartment facility at the most affordable rental cost to its residents. One way it is able to do this, for example, is by directly financing the project on favorable terms and conditions. Specifically, The Salvation Army intends to provide a first mortgage loan with an interest rate of 1% and an amortization term of 40 years. Additionally, the loan will be payable solely from available cash flow. If we were to apply conventional rates and terms to the permanent loan amount, rents would be required to be about 40% higher than currently projected to meet the additional fixed cost.

The Salvation Army will work closely with its management agent, The Alexander Company, to establish the initial rents and to determine any rent increases required to operate the project for its intended purpose.

Recent rising rents associated with LIHTC units in the Madison area have been driven by higher than historical average income increases, particularly over the past two years. Unlike other states, WHEDA does not require prior approval for annual rent increases and so this falls to owner discretion. Given TSA's mission and its own soft funding, the project will have the unique ability to control its own destiny relative to affordable rents and year-over-year rent increases to ensure that the units remain as affordable as possible for the clients they serve. Internal structures to limit rent increases for renewals will be based on mission – providing and maintaining quality affordable housing for those in need.

3. On what is the soft cost contingency figured based? This number seems high.

The soft cost contingency is approximately 5% of all non-construction and hard cost contingency budgeted items. The Salvation Army anticipates reviewing both the hard and soft cost contingency budgets prior to filing its WHEDA application. By that time, it is expected that the architectural plans, city and other engineering requirements will be

at a level to allow the construction manager to provide a more thorough and complete construction cost opinion. Additionally, it is expected that at that time, The Salvation Army will have fully vetted the soft cost requirements and would be in a position to make any necessary adjustments. The resulting budgets for hard cost and soft cost contingencies will be established to meet all WHEDA requirements and guidelines.

4. The budget lists permit fees as \$0. Are building permit fees accounted for in this budget? If so, where? Are certain costs like this assigned to other portions of the overall redevelopment?

The budget assumes that the building permit fee will be included in the general contractor's budget, as is the practice in many other locations. The Salvation Army has recently finalized its selection of a construction manager and will rely on the guidance of the architect and construction manager to determine the appropriate budget for permit fees, as well as the appropriate line item for the fees (i.e., whether the fees are the responsibility of the construction manager or the owner).

(Note: the development sources and uses budget for the LIHTC project is completely independent from that which will be prepared for the proposed emergency shelter that will be developed on an adjacent parcel.)

5. Will the Salvation Army-provided permanent loan be considered must-pay debt? Please revise your pro forma so that the TSA loan is combined principal and interest and the Hard Debt Coverage Ratio (DCR) is appropriately calculated.

No, The Salvation Army loan will be structured to require payments only to the extent that the project has remaining cash flow after paying all operating expenses, reserves and the must-pay debt from the City of Madison.

6. Why is the vacancy rate estimated to be lower than the WHEDA-standard/required 7.0%?

The vacancy rate reflected in the application reflects a blended rate among the 7% vacancy rate applied to the 25 LIHTC units targeted to 50-60% AMI households; the 7 market rate units; and the 0% vacancy factor that was applied to the 12 SHU units, which are targeted to 30% AMI households. The Salvation Army proposes to provide rental/operating assistance payments for those 12 units and would make those monthly payments regardless of occupancy status of the units.

7. What will be the anticipated monthly cost to tenants of the underground parking stalls?

The current operating pro forma calls for the 32 subsurface spaces to be rented at a rate of \$100 per month, which was established after a review of several similar covered parking lots in the area.

Scoring

- 1. How are you claiming the 5 points under the High Need Area scoring category portion of WHEDA's Areas of Economic Opportunity? The project Census Tract is not considered a High Needs Tract by WHEDA and there was not a public RFQ for this property.**

WHEDA's 2019 LIHTC Appendix R states that points will be awarded to developments which are located in, or are one-half (1/2) mile or less from certain tracts. The project site is located in Census Tract 18.02 which is not a High Needs Tract. It is, however, located ½ mile or less from Census Tract 17.05 and Census Tract 19, both of which are categorized as High Need Areas by WHEDA, and thus should be awarded 5 points.

- 2. How did you estimate the full Project Team score without knowing who the property management company will be?**

We estimated 11 points (out of the maximum 12 points) based on WHEDA's self-scoring exhibit. The Salvation Army Central Territory is to be the primary developer. TSA Central Territory has seven HTC properties within four states (1 point); more than 40 years of development experience and 18 years of HTC experience (2 points); and average physical occupancy above 96% during the past three years (3 points). We also based the WHEDA evaluation of capacity and delivery on these seven HTC properties mentioned above (3 points). Lastly, The Salvation Army is a nonprofit organization acting as Developer and Owner in the Nonprofit Set-Aside (2 points).

Other

- 1. What is the status of the selection of the property management company? Please address all questions related to the property manager, including experience, capacity, etc.**

The Salvation Army has chosen Madison-based Alexander Company as its property management partner. One of the first firms to utilize the Low Income Housing Tax Credit program beginning with its inception in 1986, the Alexander Company has since developed more than 5,000 housing units in a dozen states, with the overwhelming majority being affordable. The Company currently maintains and manages roughly 600 affordable units in five states, and is currently constructing another 400+ affordable housing units spread across the Town of Madison, the City of Milwaukee and Greensboro, North Carolina. While the Alexander Company staff does not perform supportive services functions, it is currently in a partnership with the Housing Authority of the City of Milwaukee (HACM), which is developing housing for veterans who are homeless or at risk of becoming homeless. The partnership will include wrap-around

services provided by both HACM and the United States Veterans Administration. Alexander Company leadership is well steeped in TSA service to the community and for that reason is enthusiastic to partner in providing quality, affordable housing combined with the extensive wrap-around service options offered by TSA. Finally, given the Company's long history, geographic diversity and use of other funding sources, the Alexander Company's team is fully accustomed to providing culturally sensitive property management and marketing practices, both by choice, and in some cases, as mandated by certain program requirements.

2. What is the property management company's experience working with HOME funds and the ongoing compliance requirements associated with this funding source?

The Alexander Company has developed dozens of HOME funded units and currently manages 24 such units in three states. Additionally, the Company has experience in compliance associated with LIHTC, CDBG, New Markets Tax Credits and other local affordability requirements. The Alexander Company's in-house, Madison-based compliance staff hold certifications including: Certified Occupancy Specialist, Housing Credit Certified Professional and, as of September 4th, Housing Compliance Manager for HOME Funds designations.

3. As a faith-based non-profit organization, please address TSA's adherence to Fair Housing and Equal Access laws, especially as it applies to non-discrimination on the basis of religion and/or any other protected class that may at times be interpreted as having a religion connection or lack thereof (e.g., sexual orientation, gender identity, etc.)?

Since its founding nearly 150 years ago, The Salvation Army has lived out its mission: To meet human needs in His name, without discrimination. People who come to the Army for assistance will be served according to their needs and our capacity to help -- regardless of race, gender, ethnicity, religion, sexual orientation, or gender identity. Our housing is and will continue to be open to all persons. The Salvation Army seeks to be a welcome, safe place for all men, women, transgender people, and children.

4. Please confirm if TSA plans to or has already secured legal counsel with Wisconsin tax credit expertise, as this would be strongly encouraged.

Counsel representing the partnership of this project will be Janice Hetland of Lathrop Gage LLP. Jan has more than 30 years of experience, on a nationwide basis, in serving as tax credit counsel for low income housing tax credit projects, including projects in Wisconsin. Recent Wisconsin projects in which Jan has served as tax credit counsel include Artisan Village, Whitetail Ridge and Lawler School Lofts. Local Wisconsin counsel will be Matt Monroe of Godfrey and Kahn.

Timeline:

- 5. Timeline proposes starting construction in November. If that is delayed by a few weeks, start of construction would likely be delayed through the winter. Is Spring 2021 a more likely or realistic start date?**

We believe that the timeline reflects a realistic scenario assuming that all funding commitments (except for the AHP commitment – see next question) are in place at the time WHEDA publishes its preliminary awards in March 2020. This will allow for sufficient time to complete the necessary predevelopment work and start construction as indicated in the proposed schedule.

- 6. Has an application for AHP funds already been submitted? If not, an award of AHP funds by FHLB Chicago would not be known until December 2020, making Spring 2021 start of construction more likely. Please confirm timeline.**

No, the application has not yet been submitted. The Salvation Army intends to submit an application to the Chicago FHLB through a member bank in accordance with its 2020 implementation plan and schedule. The Chicago FHLB AHP implementation plan requires that applicants proposing projects with LIHTC credits first obtain the LIHTC reservation before submitting an application for AHP funding.

The Chicago FHLB typically calls for applications to be due in late May or early June, so The Salvation Army is anticipating submitting the application at that time next year. As it has done with other projects, The Salvation Army will bridge the AHP financing and guarantee to increase its financial commitment to the project if it is unsuccessful in obtaining the AHP funds. Accordingly, The Salvation Army will not need the AHP commitment to proceed with its pre-development activities leading to closing.

- 7. Please provide an update on the Shelter Relocation Plan. If not yet ready, this will need to be ready in acceptable format before a commitment of CDD funds is made.**

The Salvation Army met with multiple city departments on July 29, 2019 to present some options regarding the shelter relocation plan. While not all ideas were met with unanimous support, The Salvation Army is committed to exploring all options to find a location that meets the needs of the City of Madison and is a practical solution for our emergency shelter guests. We will utilize a hotel voucher program for families, a model we used when we operated a 90-day family shelter. We currently have an agreement with a local hotel for room usage. During construction of the redevelopment, we will negotiate a lower rate for the duration of the construction phase. Families are given a weekly voucher from TSA to pay for the room. The hotel serves a continental breakfast, and grocery cards are supplied to supplement food for the families. Case management services for the families will be provided at the hotel or the family will be welcome to come to the TSA office, whichever the family prefers.

In sheltering our single women guests, there may need to be a combination of solutions. Some options we are considering include speaking with area churches that may be willing to help and have some capacity for emergency shelter; the construction of the gymnasium first in the redevelopment plan in order to house single women (this is a feasibility question for our architect and construction manager and will depend on site access); and the continued active search for available vacant properties near East Washington or within the vicinity that are also close to bus lines. As an example, we are currently looking at a former nursing home and are open to all suggestions that come our way.

Sustainability:

- 8. Proposal seems to offer only (already effectively required) Wisconsin Green Built standards. What progress has been made toward outlining the ways in which this project can help to meet the City's goal of 100% renewable energy and Net Zero carbon emissions as described in Question 49.**

We are committed to meeting the Wisconsin Green Built standards and are currently working with our Construction Management team (Miron Construction) to analyze the project construction costs and site logistics against the operating proforma. Current net zero carbon emission systems include nuclear, solar, and wind energy production. We are committed to continued analysis of the building and site orientation in relation to the surrounding existing environment in order to determine the realistic feasibility of the use of these emission reducing systems.

The site is also optimally located on the city's major bus line service. This allows for our tenants to use public transportation, thus lowering the building's overall carbon footprint.

- 9. If decisions on sustainability measures depend on the general contractor, please provide an update on the status of finding a general contractor.**

The Salvation Army has recently chosen Miron Construction Company as its Construction Manager. Theresa Lehman is the Director of Sustainability at Miron and is currently reviewing the proposed LIHTC apartment building and overall TSA redevelopment plan.

**The Salvation Army / Mifflin Street Apartments
Supplemental Information Requested by City of Madison CDD**

Item 1 – A PowerPoint Presentation is being developed for the Sept. 5th CDBG Meeting covering key issues. As part of this presentation, we plan to introduce the Salvation Army's Good Neighbor Policy (see attachment). We have met with the neighborhood police and consulted with staff from the Beacon. TSA staff now wear red shirts to identify themselves as staff. We are implementing new parking passes and parking monitoring. We are going to be hiring a community advocate to assist with enforcing the Good Neighbor Policy as well as the other rules both inside and outside of the building.

Item 2 - Updated Affordable Housing Fund Application Materials

A. Budget & Pro-forma for Mifflin Street Apartments

The development budget and operating pro forma for the project have been revised to reflect a number of changes since the original application. The updated CDD rent schedule and workbook are attached along with the updated developer's projections. Salient changes that have been made in the development budget and operating pro forma, as follows:

Development Costs

1. Construction Contingency – reduced from 10% to 7.5% of hard costs.
2. Architectural Design & Supervision – reduced to actual cost in contract (which was entered into in late July 2019, after the original application was submitted).
3. Soft Cost Contingency – reduced to approximately 5% of the soft cost line items in the budget.
4. Operating Reserve – increased from \$125,000 to \$165,000 to reflect investor-requested reserve of 6 months of expenses and debt service.
5. Developer Fee – reduced to \$924,000 (\$21,000/unit) in accordance with recent WHEDA guidance as to the maximum allowable fee.

The total development cost was reduced by \$634,000 to \$11,880,000. Miron Construction, the project's construction manager, is still reviewing the project's architectural scope and preparing its construction cost opinion. It is estimated that this opinion will be completed in mid-September.

Development Sources

1. TSA Permanent 1st Mortgage – the loan was restructured to provide for a fixed P & I schedule over the term of the loan. TSA will provide a permanent 1st mortgage in the amount of \$1,250,000 at a fixed rate of 1% over a loan and amortization period of 40 years. The developer contacted two banks to obtain conventional rates and terms for such a first mortgage. Based on the average rate of about 5.50% and an assumed amortization term of 30 years, the project's cash flow would support a 1st mortgage of about \$400,000, which would leave an additional gap of \$850,000.

2. LIHTC Equity – the WHEDA requested LIHTC allocation was increased from \$670,000 to \$680,000, which yields equity assuming a pay rate of \$0.92/\$1.00 credit that maximizes the WHEDA score for project leveraging.
3. Deferred Developer’s Fee – this remains at 1/3rd of the developer’s fee; however, due to the reduction in the fee (see item above), the deferred portion is now \$308,000.
4. Project Funding Gap – assuming that the City and County provide their respective funds as requested by the developer, there will still remain a funding gap of approximately \$916,000. The developer will commit to provide this in the form of an additional GP equity contribution, as it has done on other projects.

Operating Pro Forma

1. Unit Composition – there was a slight revision in the unit composition, from 17 x 0 BR & 27 x 1 BR units to 16 x 0BR & 28 x 1 BR units.
2. LIHTC Rent Discounts – the project charged rents are 10% below the 2019 maximum LIHTC rents.
3. Utility Allowances – these were increased to reflect CDD-recognized utility allowance schedules.
4. Rents/Utilities for 30% AMI/SHU Units – these will be covered through the TSA-funded rental assistance agreement for the 12 SHU units. (See additional information in next section.)
5. Parking – no monthly parking will be charged to any resident; parking will be included in rent.
6. Operating Expenses – these were increased slightly to reflect estimates provided by the project’s management agent.
7. Vacancy Rate – a 7% vacancy was applied to all units and rental income.

B. Unit Mix and Rents

1. Unit Mix - the project’s unit mix has slightly changed. See attached updated architectural plans. The total number of units and the mix between affordable and market rate stayed the same; however, there was a slight revision in the unit composition, from 17 x 0 BR & 27 x 1 BR units to 16 x 0BR & 28 x 1 BR units.
2. Rents – the LIHTC rents reflect a 10% discount from the 2019 maximum LIHTC rents. The rent on the 7 x 1BR market rate units is set at 5% higher than the comparable 1 BR unit at 60% AMI (per WHEDA guidance).
3. Utilities – the utility allowances were increased to reflect CDD-recognized utility allowance schedules; all tenants will pay their own utilities except for residents in the 12 SHU units.

4. Furnishings – the development budget includes an F & E line item for \$90,000, \$60,000 of which is intended to furnish the 12 SHU units and the balance of which will be used for office/community room and other common-area furnishings.

5. Parking – this will be included in tenant’s rent.

6. TSA Rent & Utility Subsidy for 12 SHU Units – the scheduled estimate for these subsidy payments, which over a 15-year period and assuming a 2% per year escalation is roughly \$1.24 million, is attached hereto.

C. Updated WHEDA Self-Score

The updated copy of the WHEDA self-score page from the CDD application is attached.

D. Development Cost Items of Concern

1. Construction Cost - Miron Construction, the project’s construction manager, is still reviewing the project’s architectural scope and preparing its construction cost opinion. It is estimated that this opinion will be completed in mid-September.

2. Land Cost – as part of its due diligence related to the acquisition of adjoining property for the overall development of its new shelter and LIHTC apartments facilities, The Salvation Army commissioned an appraisal of those parcels. The appraisal was conducted by a Madison-based appraiser and the appraisal report was dated April 10, 2019. The appraiser separated out the three subject parcels into two potential redevelopment sites. Site A includes the two parcels next to the Army’s current property, addresses as 648 West Washington and 12 North Blount Street. The appraiser concluded a market value of the land in Site A to be \$65/sq. ft.

The parcel on which the proposed LIHTC building will be located will front on Mifflin and will consist of a portion of property currently owned by The Salvation Army plus a portion of property that will be acquired and which is subject to the referenced appraisal. Per the project’s architect, the LIHTC parcel will contain approximately 21,984 sq. ft.

As it fronts on Mifflin instead of East Washington, the developer’s assessment is that the per square foot valuation provided by its appraiser would need to be slightly discounted, since it is not as valuable as East Washington frontage. Using information from the County Assessor’s website as to the relative value of 12 North Blount vs. 648 East Washington, a reasonable discount for not having East Washington frontage would be about \$10/sq. ft., or an adjusted valuation of \$55/sq. ft.

Based on this adjusted land opinion of value and the estimated size of the LIHTC parcel, the concluded valuation of the property is 21,984 sq. ft. @ \$55/sq. ft. or about **\$1,209,000**.

HOUSING INFORMATION & UNIT MIX

46. 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:		601 East Mifflin Street, Madison, WI 53703					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%	12	6	6	0	0	0	480	515				
40%	0	0	0	0	0	0						
50%	12	5	7	0	0	0	798	854				
60%	13	5	8	0	0	0	958	1024				
LIHTC Sub-total	37	16	21	0	0	0						
Market*	0	0	7	0	0	0		1089				
Total Units	37	16	28	0	0	0	Notes:					

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

ADDRESS #2:		N/A					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%	0	0	0	0	0	0						
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 you will be portraying on your LIHTC application to WHEDA that 8 PBV units will be 50% CMI units, please include those on the "50%" row in the below table(s)). The City of Madison will enforce this income designation in your AHF Loan Agreement, if your proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.

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

APPLICANT & PROJECT NAME:

The Salvation Army / Mifflin Street Apartments

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:						
The Salvation Army	\$ 1,250,000	Y	1.00%	40	40	\$37,928
Subordinate Loan-Lender Name:						
Subordinate Loan-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
Not Applicable						
AHP Loan	\$ 900,000	N	0.00%	30	30	\$0
City-AHF Deferred Loan	\$ 500,000	N	0.00%	30	30	\$0
City-AHF Interest/Cash Flow Loan	\$ 500,000	Y	2.75%	16	30	\$24,494
City-TIF Loan	\$ -					
Other-Specify Lender/Grantor:						
Dane County WI / AHDF	\$ 1,250,000	N	0.00%	30	30	\$0
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 6,256,000					
Historic Tax Credit Equity	\$ -					
Deferred Developer Fees	\$ 308,000					
Owner Investment	\$ -					
Other-Specify:						
Additional GP Equity Contribution	\$ 916,000					
Total Sources	\$ 11,880,000					

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
The Salvation Army	\$ 7,500,000	5.00%	24 months
Bridge Loan-Lender Name:			
NONE			24
Tax Credit Equity:			
Limited Partner To Be Determined	\$ 1,821,400		
Total	\$ 9,321,400		

Estimated pricing on sale of Federal Tax Credits: **\$ 0.92**

Estimated pricing on sale of State Tax Credits: **\$ -**
(if applicable)

Remarks Concerning Project Funding Sources:

The estimated development budgets anticipate a request to WHEDA for a 9% LIHTC allocation of \$680,000, which at the estimated price of \$.92 would yield total equity of \$6,256,000. The general partner's contribution (\$600) and roughly 30% of the limited partner's contribution would be available during construction; the balance of the limited partner's contribution would be paid in installments following completion. Additionally, the GP will make an extraordinary capital contribution of \$916,000 to fill the funding gap.

APPLICANT:

The Salvation Army

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$1,000,000
Existing Buildings/Improvements	\$0
Other (List)	
	\$0

Construction:	
Construction/Rehab Costs	\$7,119,770
Construction Profit	\$427,186
Construction Overhead	\$142,395
General Requirements	\$427,186
Construction Supervision	\$0
FF&E/Personal Property	\$0
Demolition	\$0
Site Work	\$0
Landscaping	\$0
Construction Contingency	\$533,984
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	\$220,000
Architect - Supervision	\$15,000
Engineering	\$45,000
Other (List)	
	\$0

Interim/Construction Costs	
Builder's Risk/Property Insurance	\$40,000
Construction Loan Interest	\$250,000
Construction Loan Origination Fee	\$0
Real Estate Taxes	\$20,000
Park Impact Fees	\$26,600
Other Impact Fees	\$0
Other (List)	
Lender/Investor Inspection	\$25,000

Financing Fees	
Cost of Bond Issuance	\$0
Permanent Loan Origination Fee	\$0
Other Permanent Loan Fees	\$0

Soft Costs	
Appraisal	\$7,500
Market Study	\$6,500
Environmental Reports	\$20,000
Survey	\$20,000

Permits	\$0
Lease-Up Period Marketing	\$0
Tax Credit Fees	\$0
Accounting/Cost Certification	\$35,000
Title Insurance and Recording	\$35,000
Relocation	\$0
FF&E	\$90,000
Capital Needs Assessment (if rehab)	\$0
Legal	\$75,000
Other (List)	
Site Plan Review	\$5,000
Fees:	
Bridge Loan Fees	\$0
Organizational Fees	\$0
Syndication Fees	\$0
Development Fee	\$924,000
Developer Overhead	\$0
Other Consultant Fees	\$0
Other (List)	
WHEDA LIHTC Fees	\$69,150
Reserves Funded from Capital:	
Lease-Up Reserve	\$45,000
Operating Reserve	\$165,000
Replacement Reserve	\$25,800
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$30,000
Other: (List)	
Soft Cost Contingency	\$34,929
TOTAL COSTS:	\$11,880,000

APPLICANT: The Salvation Army

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	396,060	403,981	412,061	420,302	428,708	437,282	446,028	454,948	464,047	473,328	482,795	492,451	502,300	512,346	522,593	533,045
Less Vacancy/Bad Debt	27,724	28,279	28,844	29,421	30,010	30,610	31,222	31,846	32,483	33,133	33,796	34,472	35,161	35,864	36,581	37,313
Income from Non-Residential Use*	5,465	5,574	5,686	5,800	5,915	6,034	6,154	6,278	6,403	6,531	6,662	6,795	6,931	7,070	7,211	7,355
Total Revenue	373,801	381,277	388,902	396,680	404,614	412,706	420,960	429,380	437,967	446,727	455,661	464,774	474,070	483,551	493,222	503,087
Expenses:																
Office Expenses and Phone	8,059	8,301	8,550	8,806	9,070	9,343	9,623	9,912	10,209	10,515	10,831	11,156	11,490	11,835	12,190	12,556
Real Estate Taxes	52,800	54,384	56,016	57,696	59,427	61,210	63,046	64,937	66,885	68,892	70,959	73,088	75,280	77,539	79,865	82,261
Advertising, Accounting, Legal Fees	11,200	11,536	11,882	12,239	12,606	12,984	13,373	13,775	14,188	14,613	15,052	15,503	15,969	16,448	16,941	17,449
Payroll, Payroll Taxes and Benefits	68,241	70,288	72,397	74,569	76,806	79,110	81,483	83,928	86,446	89,039	91,710	94,462	97,295	100,214	103,221	106,317
Property Insurance	19,000	19,570	20,157	20,762	21,385	22,026	22,687	23,368	24,069	24,791	25,534	26,300	27,089	27,902	28,739	29,601
Mtc, Repairs and Mtc Contracts	35,150	36,205	37,291	38,409	39,562	40,748	41,971	43,230	44,527	45,863	47,239	48,656	50,115	51,619	53,168	54,763
Utilities (gas/electric/fuel/water/sewer)	44,024	45,345	46,705	48,106	49,549	51,036	52,567	54,144	55,768	57,441	59,165	60,940	62,768	64,651	66,590	68,588
Property Mgmt	22,589	23,267	23,965	24,684	25,424	26,187	26,972	27,782	28,615	29,474	30,358	31,268	32,207	33,173	34,168	35,193
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	13,200	13,596	14,004	14,424	14,857	15,302	15,761	16,234	16,721	17,223	17,740	18,272	18,820	19,385	19,966	20,565
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
Asset Management Fee	7,500	7,725	7,957	8,195	8,441	8,695	8,955	9,224	9,501	9,786	10,079	10,382	10,693	11,014	11,344	11,685
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Operating Expenses	281,763	290,216	298,922	307,890	317,127	326,641	336,440	346,533	356,929	367,637	378,666	390,026	401,727	413,778	426,192	438,978
Net Operating Income	92,038	91,061	89,980	88,790	87,487	86,066	84,521	82,847	81,038	79,090	76,995	74,748	72,343	69,773	67,030	64,109
Debt Service:																
First Mortgage	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928
Second Mortgage	0	0	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	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928
Total Annual Cash Expenses	319,691	328,144	336,850	345,818	355,055	364,569	374,368	384,461	394,857	405,565	416,594	427,954	439,655	451,706	464,120	476,906
Total Net Operating Income	54,110	53,133	52,052	50,862	49,559	48,138	46,593	44,919	43,110	41,162	39,067	36,820	34,415	31,845	29,102	26,181
Debt Service Reserve	0	0	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	0	0
Cash Flow	54,110	53,133	52,052	50,862	49,559	48,138	46,593	44,919	43,110	41,162	39,067	36,820	34,415	31,845	29,102	26,181
AHF City Interest Loan	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494

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

DCR Hard Debt	2.43	2.40	2.37	2.34	2.31	2.27	2.23	2.18	2.14	2.09	2.03	1.97	1.91	1.84	1.77	1.69
DCR Total Debt	1.47	1.46	1.44	1.42	1.40	1.38	1.35	1.33	1.30	1.27	1.23	1.20	1.16	1.12	1.07	1.03

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:

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	543,706	554,580	565,671	576,985	588,524	600,295	612,301	624,547	637,038	649,778	662,774	676,029	689,550	703,341
Less Vacancy/Bad Debt	38,059	38,821	39,597	40,389	41,197	42,021	42,861	43,718	44,593	45,484	46,394	47,322	48,269	49,234
Income from Non-Residential Use*	7,502	7,652	7,805	7,961	8,121	8,283	8,449	8,618	8,790	8,966	9,145	9,328	9,515	9,705
Total Revenue	513,148	523,411	533,880	544,557	555,448	566,557	577,888	589,446	601,235	613,260	625,525	638,036	650,796	663,812
Expenses:														
Office Expenses and Phone	12,932	13,320	13,720	14,132	14,555	14,992	15,442	15,905	16,382	16,874	17,380	17,901	18,438	18,992
Real Estate Taxes	84,728	87,270	89,888	92,585	95,363	98,224	101,170	104,205	107,332	110,551	113,868	117,284	120,803	124,427
Advertising, Accounting, Legal Fees	17,973	18,512	19,067	19,639	20,228	20,835	21,460	22,104	22,767	23,450	24,154	24,878	25,625	26,394
Payroll, Payroll Taxes and Benefits	109,507	112,792	116,176	119,661	123,251	126,948	130,757	134,680	138,720	142,881	147,168	151,583	156,130	160,814
Property Insurance	30,489	31,404	32,346	33,317	34,316	35,346	36,406	37,498	38,623	39,782	40,975	42,204	43,471	44,775
Mtc, Repairs and Mtc Contracts	56,405	58,098	59,841	61,636	63,485	65,389	67,351	69,372	71,453	73,596	75,804	78,078	80,421	82,833
Utilities (gas/electric/fuel/water/sewer)	70,646	72,765	74,948	77,196	79,512	81,898	84,355	86,885	89,492	92,176	94,942	97,790	100,724	103,745
Property Mgmt	36,249	37,336	38,456	39,610	40,798	42,022	43,283	44,581	45,919	47,296	48,715	50,177	51,682	53,232
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	21,182	21,818	22,472	23,146	23,841	24,556	25,293	26,051	26,833	27,638	28,467	29,321	30,201	31,107
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
	12,035	12,396	12,768	13,151	13,546	13,952	14,371	14,802	15,246	15,703	16,174	16,660	17,159	17,674
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenses	452,147	465,711	479,683	494,073	508,895	524,162	539,887	556,084	572,766	589,949	607,648	625,877	644,653	663,993
Net Operating Income	61,001	57,700	54,197	50,484	46,553	42,395	38,001	33,363	28,469	23,311	17,877	12,158	6,143	-181
Debt Service:														
First Mortgage	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928
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
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928	37,928
Total Annual Cash Expenses	490,075	503,639	517,611	532,001	546,823	562,090	577,815	594,012	610,694	627,877	645,576	663,805	682,581	701,921
Total Net Operating Income	23,073	19,772	16,269	12,556	8,625	4,467	73	-4,565	-9,459	-14,617	-20,051	-25,770	-31,785	-38,109
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	23,073	19,772	16,269	12,556	8,625	4,467	73	-4,565	-9,459	-14,617	-20,051	-25,770	-31,785	-38,109
AHF City Interest Loan	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494	24,494

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

DCR Hard Debt	1.61	1.52	1.43	1.33	1.23	1.12	1.00	0.88	0.75	0.61	0.47	0.32	0.16	0.00
DCR Total Debt	0.98	0.92	0.87	0.81	0.75	0.68	0.61	0.53	0.46	0.37	0.29	0.19	0.10	0.00

Assumptions

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

Mifflin Street Apartments
Financial Concept
LIHTC Proforma

August 28, 2019

DEVELOPMENT BUDGET-USES

ITEM	TOTAL BUDGET	ELIG. BASIS (LIHTC)	PER UNIT	
ACQUISITION COST	\$1,000,000.00	\$0	\$22,727	
CONSTRUCTION COST				
SUBSURFACE PARKING (11,966 Sq. Ft. @ \$100 sq ft)	\$1,196,600.00	\$1,196,600	\$27,195	
NEW CONSTRUCTION (\$165 / sq. ft.)	\$5,923,170.00	\$5,923,170	\$134,618	
GENERAL REQUIREMENTS	\$427,186.20	\$427,186	\$9,709	6.00%
OVERHEAD	\$142,395.40	\$142,395	\$3,236	2.00%
PROFIT	\$427,186.20	\$427,186	\$9,709	6.00%
CONSTRUCTION CONTINGENCY (ON HARD COSTS)	\$533,982.75	\$480,584	\$12,136	7.50%
ARCHITECTURAL DESIGN	\$220,000.00	\$220,000	\$5,000	
ARCHITECTURAL SUPERVISION	\$15,000.00	\$15,000	\$341	
ENGINEERING	\$45,000.00	\$45,000	\$1,023	
CONSTRUCTION PERIOD INTEREST	\$250,000.00	\$167,000	\$5,682	
CONSTRUCTION PERIOD REAL ESTATE TAXES	\$20,000.00	\$20,000	\$455	
CONSTRUCTION PERIOD INSURANCE	\$40,000.00	\$40,000	\$909	
ACCOUNTING/FINANCIAL MODELING	\$20,000.00	\$10,000	\$455	
COST CERTIFICATION	\$15,000.00	\$15,000	\$341	
MARKET STUDY	\$6,500.00	\$0	\$148	
SURVEYING	\$20,000.00	\$20,000	\$455	
SITE PLAN REVIEW	\$5,000.00	\$5,000	\$114	
WHEDA/OTHER APPLICATION FEES	\$2,000.00	\$0	\$45	
WHEDA LIHTC RESERVATION FEES	\$65,000.00	\$0	\$1,477	
WHEDA LIHTC COMPLIANCE/OTHER FEES	\$2,150.00	\$0	\$49	
CITY OF MADISON PARK IMPACT FEES	\$26,600.00	\$26,600	\$605	
APPRAISAL	\$7,500.00	\$7,500	\$170	
INSPECTION FEES - LENDER/EQUITY PARTNER	\$25,000.00	\$25,000	\$568	
PHASE I ENVIRONMENTAL STUDY	\$20,000.00	\$20,000	\$455	
TITLE, RECORDING & DISBURSING	\$35,000.00	\$35,000	\$795	
LEGAL - GENERAL PARTNER	\$50,000.00	\$50,000	\$1,136	
LEGAL - LENDER / LP / OTHER	\$25,000.00	\$6,250	\$568	
F F & E	\$90,000.00	\$90,000	\$2,045	
SOFT COST CONTINGENCY	\$34,929.25	\$17,465	\$794	
LEASE UP / MARKETING EXPENSES	\$45,000.00	\$0	\$1,023	
OPERATING RESERVE ACCOUNT	\$165,000.00	\$0	\$3,750	
REPLACEMENT RESERVE ACCOUNT	\$25,800.00	\$0	\$586	
R E TAX / INSURANCE RESERVE ACCOUNT	\$30,000.00	\$0	\$682	
DEVELOPER FEE	\$924,000.00	\$924,000	\$21,000	
TOTALS	\$11,880,000	\$10,355,937	\$270,000	

**Mifflin Street Apartments
Financial Concept
LIHTC Proforma**

August 28, 2019

ESTIMATED ELIGIBLE BASIS	\$10,355,937	
X 1.3 FOR QCT - <u>CENSUS TRACT NO. 18.02 (NOT A 2019 QCT)</u>	100%	
ADJUSTED ELIGIBLE BASIS	\$10,355,937	
X APPLICABLE FRACTION	83%	
EQUALS QUALIFIED BASIS	\$8,595,428	
X TAX CREDIT RATE	9.00%	
MAXIMUM ELIGIBLE TAX CREDIT ALLOCATION	\$773,588	\$22,753
<u>EXPECTED EQUITY PAY IN</u>		
REQUESTED TAX CREDIT ALLOCATION	\$680,000	\$15,455
LITHC RATE	\$0.92	
ESTIMATED EQUITY	\$6,256,000	

FINANCING PLAN- CONSTRUCTION SOURCES

	<u>TOTAL</u>	<u>PER UNIT</u>	<u>PER CENT</u>
FIRST MORTGAGE - TSA/THQ	\$7,500,000	\$170,455	63.13%
SECONDARY FINANCING			
CITY - AHF DEFERRED LOAN	\$500,000	\$11,364	4.21%
CITY - AHF INTEREST/CASH FLOW LOAN	\$500,000	\$11,364	4.21%
COUNTY AHD FUND	\$1,250,000	\$28,409	10.52%
THIRD MORTGAGE - TSA/THQ - FHLB AHP	\$0	\$0	0.00%
DEFERRED DEVELOPER FEE	\$308,000	\$7,000	2.59%
INVESTOR EQUITY - GP	\$600	\$14	0.01%
INVESTOR EQUITY - LP	\$1,821,400	\$41,395	15.33%
TOTAL PROJECT COST	\$11,880,000	\$270,000	

FINANCING PLAN- PERMANENT SOURCES

	<u>TOTAL</u>	<u>PER UNIT</u>	<u>PER CENT</u>
FIRST MORTGAGE - TSA/THQ	\$400,000	\$9,091	3.63%
SECONDARY FINANCING			
CITY - AHF DEFERRED LOAN	\$500,000	\$11,364	4.53%
CITY - AHF INTEREST/CASH FLOW LOAN	\$500,000	\$11,364	4.53%
COUNTY AHD FUND	\$1,250,000	\$28,409	11.33%
THIRD MORTGAGE - TSA/THQ - FHLB AHP	\$900,000	\$20,455	8.16%
DEFERRED DEVELOPER FEE	\$308,000	\$7,000	2.79%
INVESTOR EQUITY - GP	\$916,600	\$20,832	8.31%
INVESTOR EQUITY - LP	\$6,255,400	\$142,168	56.71%
TOTAL PROJECT COST	\$11,030,000	\$250,682	100.00%

1.43

1.04

**Mifflin Street Apartments
Financial Concept
LIHTC Proforma Analysis**

Income and Expense Projections

Unit Type & Income Target	# of Units	Est. Avg. Unit Sq. Ft.	Total Net Square Feet	Square Foot Distribution	2019 Maximum LIHTC Rent	Gross Charged Rent *	Utility Allowances	Net Unit Rent	Total Monthly Gross
0 BR @ 30% AMI	6	550	3,300	12%	527	480	-	480	2,880
0 BR @ 50% AMI	5	550	2,750	10%	878	798	103	695	3,475
0 BR @ 60% AMI	5	550	2,750	10%	1,054	958	103	855	4,275
1 BR @ 30% AMI	6	705	4,230	15%	565	515	-	515	3,090
1 BR @ 50% AMI	7	705	4,935	17%	941	854	114	740	5,180
1 BR @ 60% AMI	8	705	5,640	20%	1,130	1,024	114	910	7,280
1 BR @ MARKET	7	705	4,935	17%		1,089	114	975	6,825
Totals:	44		28,540	100%					33,005

* maximum LIHTC rent discounted by an average of: **10.07%**

Operating Expenses

	Annual Cost	Cost / Unit
Office & Admin Expenses	\$ 8,059	\$ 183
Real Estate Taxes	\$ 52,800	\$ 1,200
Advertising, Accounting, Legal Fees	\$ 11,200	\$ 255
Payroll, Payroll Taxes and Benefits	\$ 68,241	\$ 1,551
Property Insurance	\$ 19,000	\$ 432
Mtc. Repairs and Mtc Contracts	\$ 35,150	\$ 799
Utilities	\$ 44,024	\$ 1,001
Property Management Fee @ 6% Collections	\$ 22,589	\$ 513
Asset Management Fee	\$ 7,500	\$ 170
Total Operating Expenses	\$ 268,563	\$ 6,104
Replacement Reserve Payment	\$ 13,200	\$ 300
Total Expenses + Reserves	\$ 281,763	\$ 6,404

Operating Proforma

Annual Total Residential Income	396,060
Miscellaneous Income	
Parking (32 spaces \$100/month)	-
Other Income	5,465
Potential Gross Income	401,525
	-
Less: Vacancy Rate	7% (27,724.20)
Effective Gross Income	373,801
Less: Operating Expenses	281,763
Net Operating Income	92,038



JLA
ARCHITECTS

THE SALVATION ARMY
THE SHIELD APARTMENTS - BLOUNT & MIFFLIN CORNER PERSPECTIVE

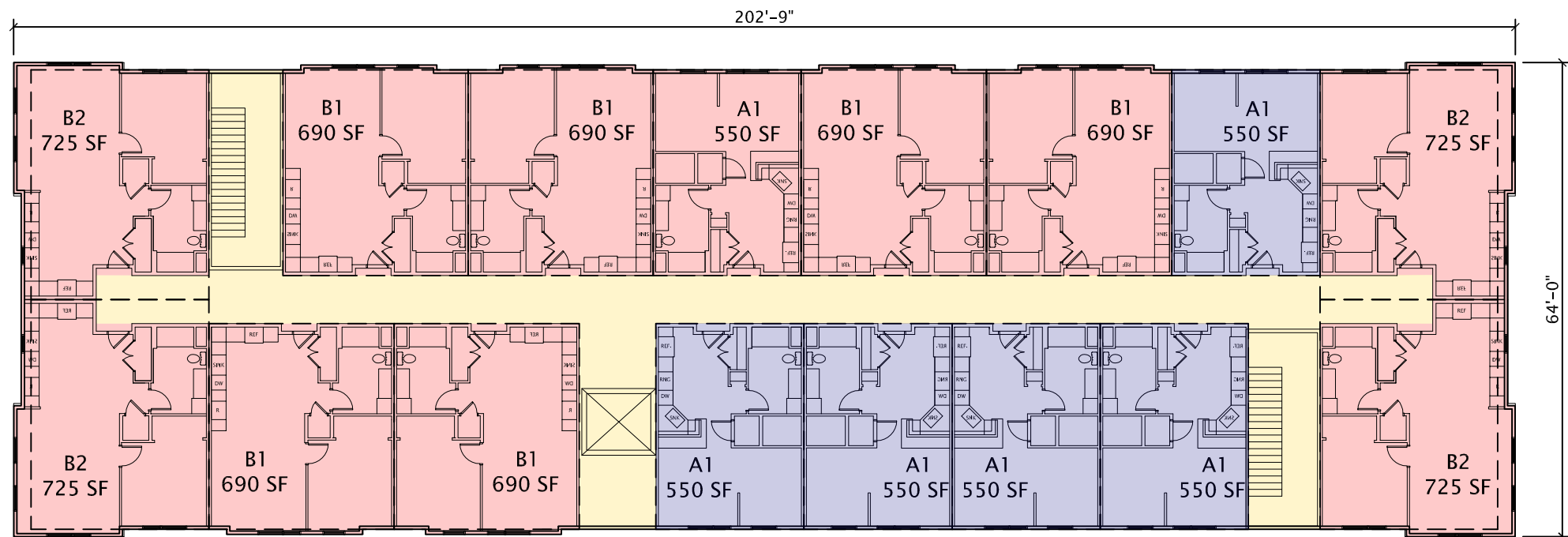
AUGUST 28, 2019



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ARCHITECTS

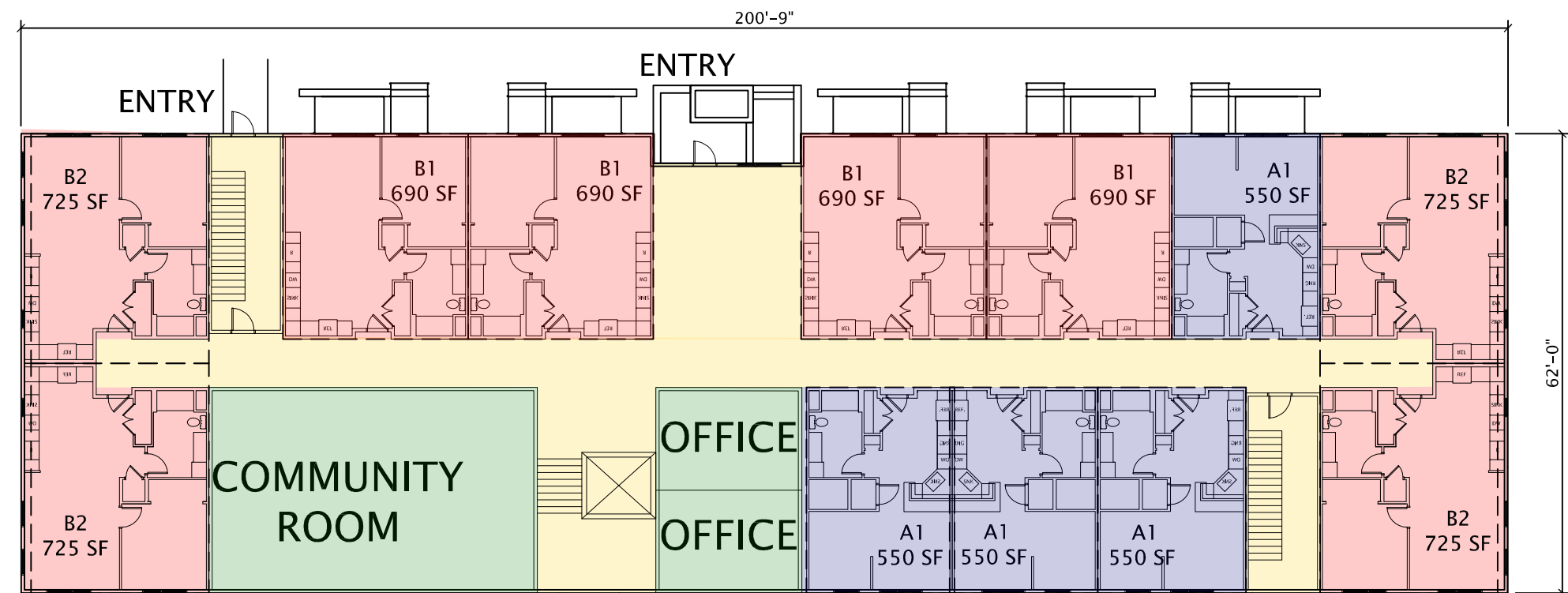
THE SALVATION ARMY
THE SHIELD APARTMENTS - MIFFLIN ST. PERSPECTIVE

AUGUST 28, 2019



SECOND & THIRD FLOOR PLAN
12,411 s.f. / floor

APARTMENT BUILDING DATA					
FLOOR	UNITS				COVERED PKG
	STUDIO	1BR	TOTAL	BR'S	
3	6	10	16	16	32
2	6	10	16	16	
1	4	8	12	12	
T.	17	27	44	44	.72 / UNIT
	39%	61%			

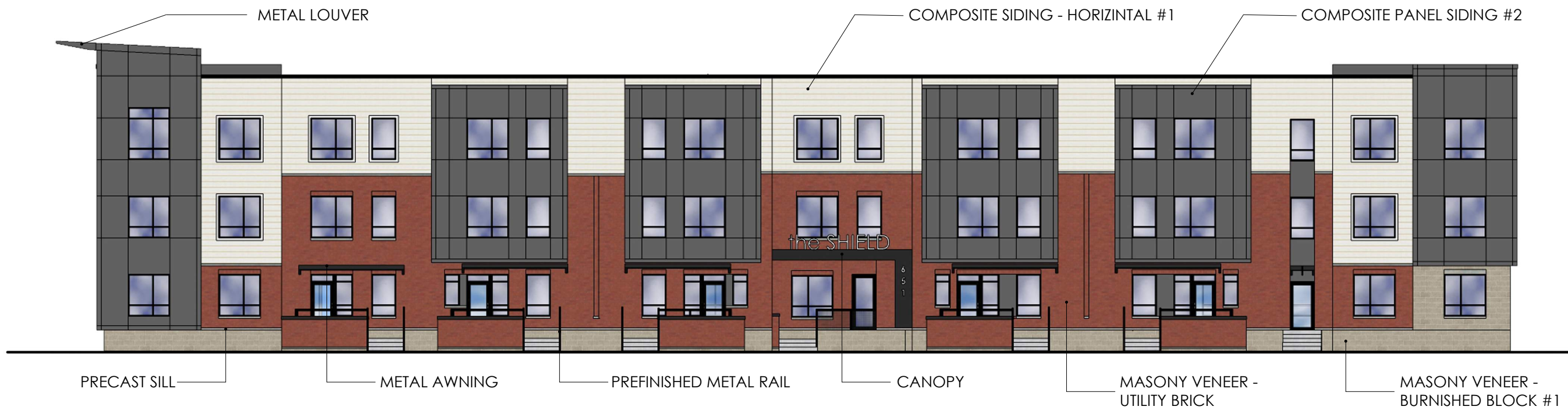


FIRST FLOOR PLAN
12,140 s.f.



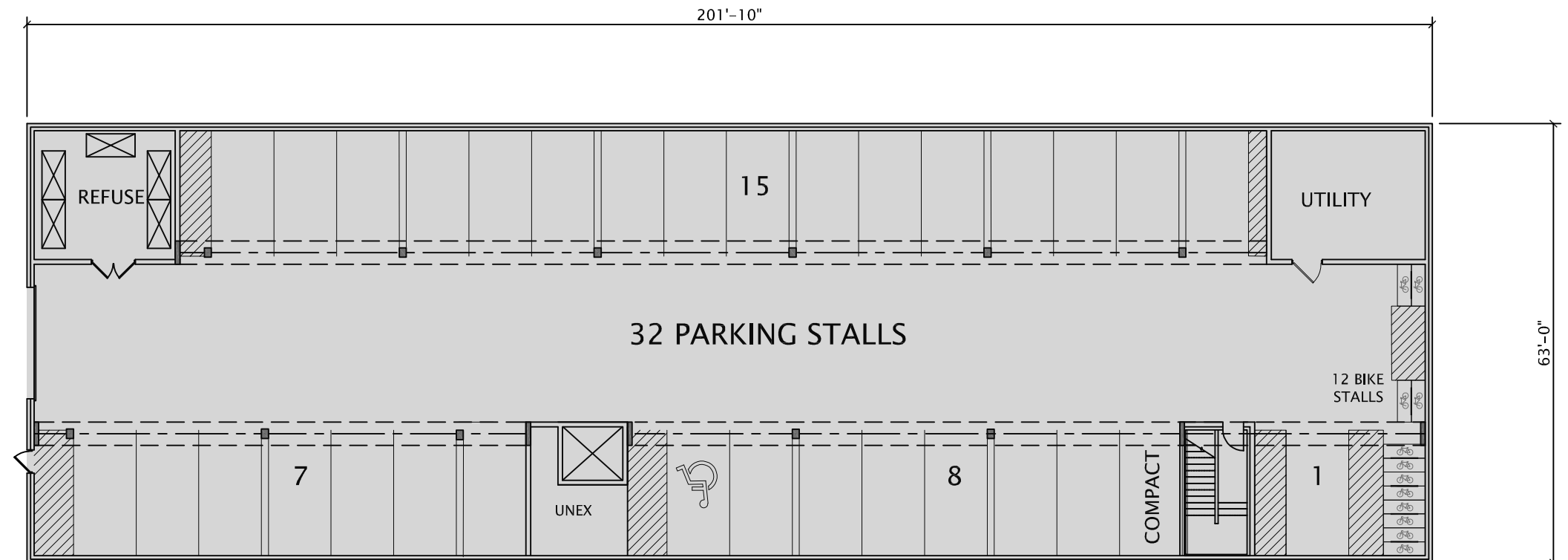


BLOUNT ST. ELEVATION
SCALE 1/16" = 1'0"



MIFFLIN ST. ELEVATION
SCALE 1/16" = 1'0"

APARTMENT BUILDING DATA					
FLOOR	UNITS				COVERED PKG
	STUDIO	1BR	TOTAL	BR'S	
3	6	10	16	16	32
2	6	10	16	16	
1	4	8	12	12	
T.	17	27	44	44	.72 / UNIT
	39%	61%			



U.G. PARKING GARAGE
12,189 s.f.



The Salvation Army / Mifflin Street Apartments

Estimated Value of 15-Year Rental & Utility Subsidy for Supportive Housing Units

Number of Units		12
Number of Years		15
1st Year Base Rent	\$	71,640
Annual Escalation		2%

YEAR	GROSS RENTS	CUMULATIVE
1	\$71,640	\$71,640
2	\$73,073	\$144,713
3	\$74,534	\$219,247
4	\$76,025	\$295,272
5	\$77,545	\$372,817
6	\$79,096	\$451,914
7	\$80,678	\$532,592
8	\$82,292	\$614,884
9	\$83,938	\$698,822
10	\$85,616	\$784,438
11	\$87,329	\$871,767
12	\$89,075	\$960,842
13	\$90,857	\$1,051,699
14	\$92,674	\$1,144,373
15	\$94,527	\$1,238,900



The Salvation Army of Dane County Good Neighbor Policy

We are committed to being a good neighbor to the surrounding community. You are a part of this community, please help us to be good neighbors while ensuring this space is safe for all.

**** Violation of these rules will result in immediate suspension of services. ****

1. **All shelter rules and consequences extend beyond The Salvation Army property to include the East Washington and Mifflin Street block area.**
2. **Guests accepted to stay in shelter for the evening may only be on property or within the block radius from 4pm-8am.** Please do not arrive before 4pm and be off premises by 8am.
3. **If you are not accepted into shelter for the evening you cannot be on property, in the building, in our parking lot, or in the immediate surrounding areas including sidewalks within the East Washington and Mifflin Street block.** If you need to get your personal items from shelter you must do so at 3:00 PM that day before shelter opens for the evening.
4. **Curfew is 9pm.** All guests are to be in the building by 9pm unless pre-approved by staff.
5. **All vehicles must have a parking lot pass to park in the Salvation Army parking lot.** Please see staff to obtain a parking pass each night you stay. Parking passes must be displayed on your dashboard in plain view.
6. **Parking passes are for those using Women's Shelter and Emergency Family Shelter and are valid from 4pm until 8am.** Even with a valid pass, guests must remove their vehicle by 8am each day. Otherwise, City of Madison Parking Enforcement will be called and you may be ticketed/ towed at your expense.

7. **Guests may not loiter on or around the shelter property including the block radius.** Loitering in or around the parking lot, including in your vehicle is not permitted. Likewise, loitering on any private property around the shelter or on the sidewalks around shelter is considered a violation of shelter rules.
8. **No guests can sleep in their car on The Salvation Army Property.**
9. **Illegal or suspicious activity on the property or around property including sidewalks is strictly forbidden.** Use of drugs or alcohol on or around property is not allowed.
10. Bikes, skate boards and playing in the parking lot are not permitted for reasons of safety.
11. **The volume of music and voices must be kept to a minimum** out of consideration for our neighbors.
12. Dispose of all trash appropriately in trash cans around the property. **Do not litter.**

I have read and understand The Salvation Army's good neighbor policy.

Name of Guest: _____

Signature: _____ Date: _____

Name of Witness: _____

Signature: _____ Date: _____

Item 3 – Shelter/Main Building Development Plan

A. Sources & Uses

The Salvation Army is unable to provide a Sources and Uses statement for the Shelter/Main building at this time. We can tell you that through normal fundraising and specific donor intent, we have already secured some funding towards this project. We are currently in the process of acquiring additional land, entering into a feasibility study which will lead us into a community capital campaign for an estimated \$15 million to secure funds for our much needed shelter and campus on E. Washington.

B. Operating Plan

The Salvation Army (TSA) proposed project is comprised of an integrated two-building campus designed to prevent and end homelessness by focusing on three components: dignified shelter, permanent homes and dedicated self-sufficiency services that will create pathways to opportunities for everyone that walks through our doors.

The building will feature natural light, open spaces and purposefully designed elements that will work to create a peaceful, productive and healing environment for our guests. The front desk will be staffed 24 hours a day 7 days a week. The building will have controlled access points with electronic control to ensure safety for both the guests and staff. There will be an adequate camera system and a community advocate will be hired to assist in monitoring both inside and outside of the facility. Parking will be below the building and will have controlled access.

Proposed shelter building services:

1. ***On the first floor***, you will see expanded clinical services including More Smiles Dental Clinic, MEDIC medical services and additional mental health services. There will meeting spaces to meet with supportive services, Conference rooms for community meetings, and meeting space for outside partners, i.e. AA, NA, Play and Learn, etc. The Administrative offices will be located here as well. There will also be a communal cafeteria space that will provide Dinner, Snack and Breakfast. The meals will be served at two separate times, families first and then the single women shelter guests, Pay to Stay, and medical respite guests.
2. ***On the second floor*** you will see the entire floor dedicated to family shelter. Entrance into the family shelter will be from the elevator lobby and all families will need to be allowed access through the doors to ensure only people that are supposed to be on that floor are entering. There will be a staff office on the family floor with direct sight lines to monitor the elevator lobby, family rooms and lounge space. The family shelter office will be staffed during the operating hours of 4pm-8am. Families will follow the same call in process as we currently operate with the exception being that families will be approved for 7 nights at a time instead of on a nightly basis. The shelter operating hours will remain the same (4pm-8am). Family shelter will consist of approximately 41 individual family rooms. The rooms will be furnished and the beds/bunk beds. The shelter bunks will include electrical outlets, small space for personal items, and linens. Bathrooms will be shared by two families and will be divided into two separate rooms for the shower/toilet room and the sink. The family shelter will have a large activity lounge (including a computer lab) with space for children of all ages and their caregivers as well as a separate quiet room for the families to have a space to relax. Families will also have access

to an outdoor rooftop space that will have access to a playground for the children. The outdoor space will be accessible between the hours of 4-9pm and monitored by family shelter staff.

3. **On the third floor** you will see two separate spaces. One space will serve approximately 82 beds for single women and the other side will consist of approximately 48 beds for pay-to-stay. Entrance into the women's shelter and pay-to-stay shelter will be from the elevator lobby and all women will need to be allowed access through the doors to ensure only people that are supposed to be on that floor are entering. There will be a staff office on the floor with direct sight lines to monitor the elevator lobby, rooms sleeping quarters and lounge space. The shelter office will be staffed during the operating hours of 5pm-8am.

- a. **Pay-to-stay:** Pay-to-stay programs allow guests to pay a nightly fee of \$7.00 to stay. An innovative feature of the program is the amount the pay-to-stay guest pays in fees for shelter services are tracked and can be used for first months rent or security deposits once an apartment is secured in the community. Pay-to-stay shelter is accessible 24 hours a day and will be monitored by staff and the main reception desk. There will be a staff office on the floor with direct sight lines to monitor the elevator lobby, rooms, sleeping quarters and lounge space. The shelter office will be staffed during the operating hours of 5pm-8am. The pay-to-stay shelter will have a separate large activity lounge (including a small computer lab) as well as a separate quiet room for the women to have a space to relax.

- b. **Women's Shelter:** Women's shelter operation hours will be between 5:00 pm-8:00 am. Women can call or drop in to reserve a bed on their first night. Women will be able to reserve the same bed until they no longer return to shelter, which will eliminate our 90-day shelter policy. The shelter bunks will include electrical outlets, usb, small space for personal items, and linens. There will be two locker room style bathrooms on the floor. There will also be two individual bathrooms and a few individual rooms that can be utilized by guests with special accommodations. The individual rooms will be prioritized for homeless youth ages 18-21. To help young people find acceptance, safety and a chance to rebuild their lives. There will be a staff office on the floor with direct sight lines to monitor the elevator lobby, rooms, sleeping quarters and lounge space. The shelter office will be staffed during the operating hours of 5pm-8am. The women's shelter will have a separate large activity lounge (including a small computer lab) as well as a separate quiet room for the women to have a space to relax.

4. **On the fourth floor** you will see two separate spaces. One space will serve approximately 29 Single Room Occupancy (SRO) beds for single women and the other side will consist of approximately 13 medical respite rooms. Entrance into the fourth floor will be accessible by the tenants and medical respite guests from the elevator lobby. There will be an office for support services on the floor with direct sight lines to monitor the elevator lobby, rooms sleeping quarters and lounge space.

- c. **SRO:** Tenants will pay monthly program fees and have access to support services. Each room will be furnished with a bed, dresser, desk, mini refrigerator and sink.

Tenants will share a bathroom with one other person. Entrance into the bathroom will be from the hallway. There will be a shared kitchen for tenants to prepare meals and a shared lounge space.

- d. **Medical Respite:** The 13-bed unit offers individuals experiencing homelessness a place to recover after hospital stays. Medical respite guests may engage with supportive services and staff will assist with nurse care coordination. Hospitals will be key partners in co-creating, operating and funding the unit. The referrals will come directly from hospitals or medical personnel. These beds will be limited to 30-day stays.

- 5. **On the fifth floor** there will be 13 more SROs with a kitchen and lounge area.
- 6. **Gymnasium** will be a gym space that can be used for larger group gathering/meeting space, special events, large trainings, and daily recreation for families and guests. There will also be a second floor that has a walking track to assist in promoting wellness.
- 7. **Support Services** will be offered to all guests residing both in the shelter building as well as the tenants in the Shield apartments. These services include but are not limited to:
 - a. Housing search and stabilization
 - b. Employment
 - c. Connecting to mainstream resources
 - d. Budgeting
 - e. Mental health
 - f. Physical Health
 - g. Credit Repair
 - h. Education
 - i. Community Connections

Item 4 – “Temporary” Shelter Relocation Plan for family & women’s shelters during construction

- a. Attached is a list of potential sites with the pros/cons of each property. Please see attachment.
- b. Women/Gym: TSA has begun conversation with the city of Madison to further discuss the plan of using 3030 Darbo Drive as a potential site. TSA is discussing current facility and what it would take to bring up to current zoning/use standards. TSA has reached out to the current Alder to begin the discussion on feasibility of using this facility if it meets city requirements.
- c. Families: If motels are utilized for emergency shelter during the relocation, families would be able to stay in a motel for 28 days (4 weeks). They will access shelter through our call-in process and our coordinated intake staff member would work to prioritize the families for shelter. Diversion would be a key element during this time, and if families need shelter, they would have a voucher for 7 days at a time up to 28 in a row. The family would work with intensive case management during that time to obtain permanent housing.

- d. Timelines: The Salvation Army will be submitting for WHEDA funding of the Mifflin Street Apartments building located along Mifflin Street in December 2019. If awarded WHEDA funds in spring of 2020 we hope to start site construction of the apartment building September 1, 2020. We anticipate construction for the apartment taking 12-13 months with occupancy starting October of 2021. The start of construction for the apartment will allow the shelter to continue operations until the new shelter construction begins.

The Salvation Army is currently securing a capital campaign for the shelter building project to be located along East Washington Avenue. We hope to break ground in January of 2021 with an anticipated 15-16 month construction cycle. The construction of the new shelter will require the existing shelter facility to be razed. A temporary shelter will be required during that time.

SALVATION ARMY CORPS/ COMMUNITY CENTER

3030 Darbo Drive
Madison, WI 53714

Highlights:

- Office building/community center
- Gym space for program
- Dining/Commercial Kitchen
- Darbo/Worthington Neighborhood
- close to bus lines
- Building is currently owned by The Salvation Army

Pros:

- Have many elements for sheltering that are similar to the E Washington location
- Showers/bathrooms in locker rooms
- Office space for intake and monitoring
- Close to bus lines
- Activity room
- immediate occupancy

Cons

- In residential neighborhood
- rearrange current community center programs in the evening.



UNDER CONTRACT TO PURCHASE

702 E Washington Ave
Madison, WI 53703

Highlights:

- Year Built 1925
- Office Building
- 2nd Floor 11,625 sf
- Located on East Washington Ave
- close to bus lines
- close to current shelter location

Pros:

- Under contract to purchase
- close proximity to current shelter
- close to Beacon day center
- close to other resources in the area

Cons

- cost to renovate for sheltering is unknown and expected to be high
- not enough bathrooms
- install showers
- unsure there would be enough space for staff and shelter guests



VACANT KARMENTA CENTER

4502 Milwaukee St
Madison, WI

Highlights:

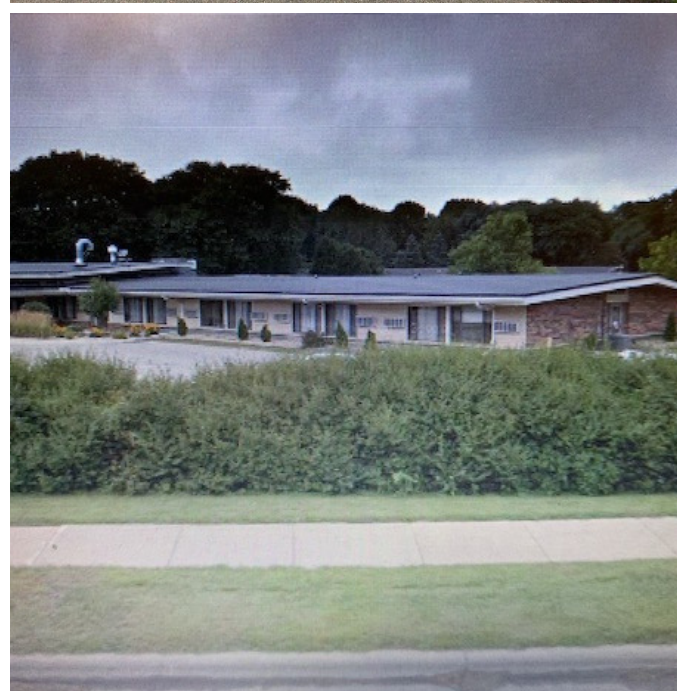
- Year Built 1979
- Ample Parking
- One story structure with full lower level
- 105 bed facility
- Dining/Kitchen facilities
- Activity Rooms

Pros:

- Plenty of space for staff and shelter guests
- close to bus lines, grocery store, Kwik Trip
- Parking for guests and staff
- minimal renovations, if any, would be needed

Cons

- Geographically placed near Montessori school
- Confusion on current owner of property
- Cost to purchase or lease is unknown
- Unsure about status of current property maintenance



FOR SALE - UW CLINIC

4122 E Towne Blvd
Madison, WI

Highlights:

- Lot size 2.04 Acres
- Year built 1979; remodel 1992
- Building size: 25,334 sf
- Sale price: \$2,500,000
- Zoning: C3L
- 300' frontage on East Washington Ave
- Ample Parking - 93 spaces
- Immediate availability
- close to bus line, mall, restaurants, banks, etc.

Pros:

- Plenty of space for staff and shelter guests
- Many resources in the area
- Parking for guests and staff
- Surrounded by commercial properties and not directly in a residential area
- Contacted the owner of property

Cons

- Cost to acquire is high
- Unknown cost to renovate
- Unsure of bathroom/shower facilities



FOR LEASE

3650 Milwaukee St
Madison, WI

Highlights:

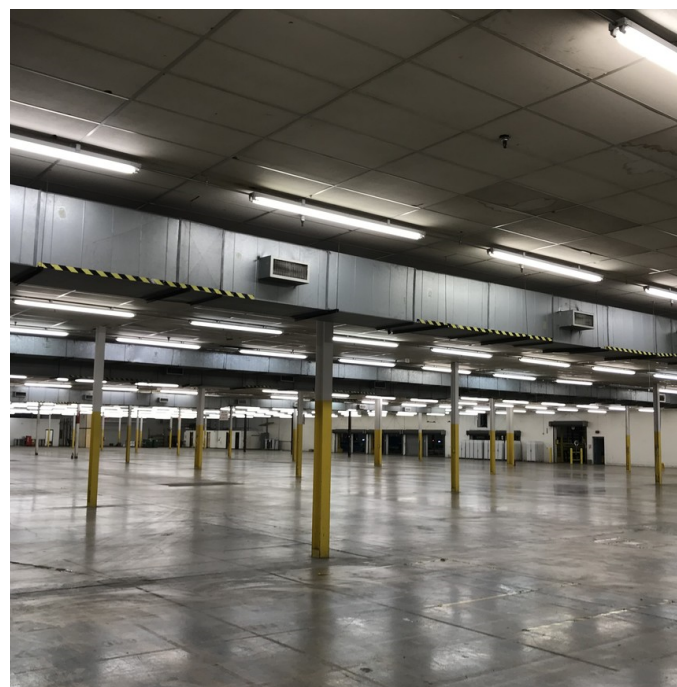
- Lot size 13.34 Acres
- Year built 1962 original warehouse; 1978 annex
- Building size: 22,100 sf
- Lease rate: \$3.50-4.50 NNN
- Zoning: IL
- 298' frontage on Milwaukee St
- Ample Parking
- Warehouse and office space
- close to bus station, Woodmans and Kwik Trip

Pros:

- Plenty of space for staff and shelter guests
- Many resources in the area
- Parking for guests and staff
- Office space is included
- Industrial area

Cons

- Unknown cost to renovate for shelter space
- Unsure of bathroom/shower facilities



Item 5 – Development Team Info

A. Miron Construction

Experience and Capacity

Please see attachment about Miron’s experience and capacity information with Residential Multi-Family construction and WHEDA projects.

Sustainability Plan

Theresa Lehman from Miron Construction is completing the sustainability plan and we will provide this to you upon receipt of the plan.

Confirmation of Construction Budget

Miron Construction is still reviewing the project’s architectural scope and preparing its construction cost opinion. It is estimated that this opinion will be completed in mid-September.

B. Alexander Company Property Management

Experience and Capacity Info with WHEDA Tax Credit Compliance

Number of projects with WHEDA: 19

Units developed with WHEDA: 1,226

Company compliance experience:

- Years of WI experience: 35+ years of experience, combined
- Accreditations: Housing Credit Certified Professional (HCCP), Certified Occupancy Specialist (COS), Housing Compliance Manager for Home Funds (HCM-HF)
- Key experience: Low Income Housing Tax Credit (LIHTC), Section 8 / Housing Choice Voucher Program, HOME Investment Partnerships Program (HOME), New Markets Tax Credit (NMTC), Community Development Block Grant Program (CDBG), Rural Rental Housing Program (RD Section 515)

Item 6 – Land Use Application

An update to the Land Use Application was submitted on Wednesday, August 28. Please let us know if you would like a copy of the update.

PROJECT EXPERIENCE



At Miron, we pride ourselves on our ability to construct facilities that garner results based on your specific needs. Our portfolio includes a diverse range of multi-family housing experience, with two projects detailed in this report. This experience allows us to approach projects differently and develop best value solutions for our clients.

Experience with The Salvation Army

Our first project with The Salvation Army included a multi-purpose addition in Appleton completed over 30 years ago. Since then, we have collaborated on several successful projects including the Ray & Joan Kroc Community Center in Green Bay and Coldspring Church and Community Center in Greenfield.

WHEDA Experience

Miron is qualified to work on WHEDA-funded projects, and we have experience working on such projects through our involvement on the Flats on the Fox development in Green Bay. This project was funded in part through WHEDA's Low Income Housing Tax Credit (LIHTC) program.

In addition to our experience with WHEDA, we are well-versed in working with government agencies at the city, county, and state levels, as well as other regulatory bodies, to ensure projects adhere to strict guidelines, policies, and procedures set forth by those agencies and organizations. Our team will work closely with The Salvation Army, JLA Architects, Old Orchard, WHEDA representatives, and other pertinent parties to understand the requirements for construction and ensure we meet those requirements.





FLATS ON THE FOX

Green Bay, Wisconsin

Profile

Owner:	Stone House Development, Inc.
Contact:	Richard Arnesen 608.251.2399
Architect:	Plunkett Raysich Architects, LLP
Project:	\$7,287,925
Building Area:	42,891 SF Remodel 39,598 SF Addition
Completion:	December 2008
Delivery Method:	Construction Manager

Features

The 39,598 SF addition and 42,891 SF of significant alterations turned this department store into eight stories of high-rise lofts with views of the Fox River and Lambeau Field from Downtown Green Bay.

The 108-foot structure contains 64 open-concept, 1,200 SF units, and includes 64 enclosed parking stalls adjacent to the building.

The top floor houses the community areas, and the first floor includes 1,200- and 2,400 SF retail spaces, as well as two, two-story live/work apartments. Amenities include an eighth-floor community room with rooftop terrace, a business center, and fitness center.

This project was funded in part through WHEDA's Low Income Housing Tax Credit (LIHTC) program.



MIDDLETON CENTER COMMERCIAL & RESIDENTIAL TOWERS - PHASE 1

Middleton, Wisconsin

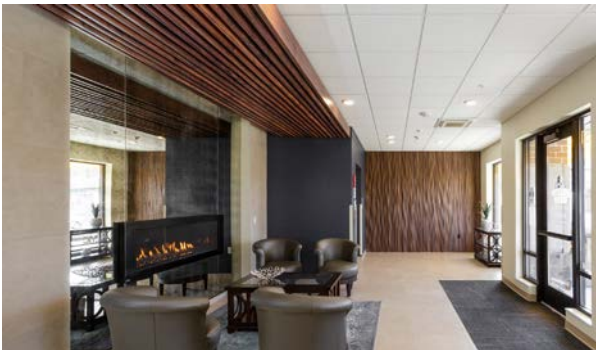
Profile

Owner:	T.Wall Enterprises, LLC
Contact:	Scott Tebon 608.826.4000
Architect:	Angus Young Associates, Inc.
Project:	\$17,300,000
Building Area:	157,100 SF
Completion:	July 2017
Delivery Method:	Construction Manager

Features

Middleton Center is a mixed-used development comprised of seven new buildings that include approximately 206 apartments, 30,500 square feet of commercial space, and 36,000 square feet of office space.

Phase 1 includes the construction of a new mixed-use, multi-family residential building. Complete with underground parking, the building features two towers. One tower houses four stories of commercial space, and the other tower has one level of commercial space and four additional levels consisting of 61 apartment units.



THE SALVATION ARMY – MIFFLIN STREET APARTMENTS AND THE CITY OF MADISON’S SUSTAINABILITY PLAN: AFFORDABLE HOUSING

The following narrative identifies the City of Madison’s Sustainability Plan relative to Affordable Housing aimed at fostering environmental, economic and social resilience, and describes how The Salvation Army (TSA) of Dane County’s proposed redevelopment plan, which includes an affordable housing component, aligns with and supports the City of Madison’s Sustainability Plan.

THE CITY OF MADISON’S OVERALL SUSTAINABILITY PLAN

The City of Madison sustainability plan vision is to, “be a self-reliant, peaceful community that relies on renewable, local resources and is able to adapt to changing environmental, social and economic conditions over time. It will be a beautiful place in harmony with the environment where life thrives.”

The Sustainability Plan is meant to provide guidance for current and future decision makers, City employees, City committee members, residents and other entities. The strategies and associated actions outlined in the Plan are not meant to be prescriptive, but rather an attempt to lay out a series of priorities and directions that will help Madison and the capital area become more sustainable. The Sustainability Plan seeks to build community resilience in the face of such challenges as peak oil, climate change and economic crises. It is designed to engage our community to create an inspiring local way of life that can withstand the shocks of rapidly shifting global systems.

Responsibility and accountability are essential to making our community more sustainable. Individuals, community groups, institutions and businesses must recognize that the decisions they make affect the sustainability of our community. City agencies will incorporate the Plan strategies and actions into their ongoing regular and annual work plans. A key role for implementing the Plan can also be played by the private sector through creating, monitoring and reporting on their sustainability goals and initiatives. All of us must hold each other accountable for making our community sustainable and for providing future generations with environmental, economic and social resources that meet their needs.

THE CHALLENGE

There is a shortage of safe, stable, affordable housing for those who live at or below the poverty line in Madison, which has led to homelessness, constant mobility, stressed family life, challenges in gaining employment, low achievement rates in our schools and limited access to health care.

VISION, MISSION & PURPOSE

The City of Madison’s sustainability vision relative to affordable housing is to be a sustainable city, promoting social equity by building economically diverse neighborhoods with equal access to quality education, housing and basic health care.

The Salvation Army (TSA) of Dane County's mission, "...to meet human needs in His name without discrimination," supports the city's vision of meeting basic human needs. TSA of Dane County is an invaluable organization providing the only two emergency shelters in Madison, and housing programs and services, including educational programs and dental and medical services, aimed at meeting basic human needs and eliminating homelessness. The programs and services provided by TSA of Dane County promote social equity by encouraging economic diversification in all neighborhoods by providing housing opportunities that result in greater stability and integration into the community for those living below the poverty line.

CITY OF MADISON AFFORDABLE HOUSING RECOMMENDED STRATEGIES/ACTIONS

1. Encouraging economic diversification in all neighborhoods provides for greater stability and integration into the community for those living below the poverty line.
2. Providing incentives to landlords...to improve energy efficiency...increases the value of their property and improves quality of life for inhabitants.
3. Building new energy-efficient affordable housing in stable neighborhoods further increases the number of units available and lowers tenants' expenses.

GOAL 1: DIVERSIFY NEIGHBORHOODS

The Salvation Army of Dane County's proposed 3-story, 44-unit multi-family Mifflin Street Apartment building will include 44 total apartment units, 37 affordable apartments (84% of the units) and 7 market-rate apartments (16% of the units). The unit mix will include 16 efficiencies (36%) and 28 one-bedroom units (64%), with 9 units being fully accessible. It is to be located within the Capitol East District on the southern border of the Tenney Lapham Neighborhood along the north side of E. Washington Ave., between N. Blair and N. Blount Streets, extending northwesterly to E. Mifflin St.

This project aligns with the city's Goal #1: Diversify Neighborhoods by offering a mix of affordable housing units and market-rate units, building the bridge between socioeconomic classes that result in greater stability for the vulnerable.

The redevelopment project, while not unique to The Salvation Army, is unique to the Madison and Dane County community. The Mifflin Street Apartments will offer qualifying TSA clients a continuum of affordable housing to help them succeed at entering the private housing market. Apartment leases will be offered to the general population, as well as qualifying TSA clients who typically require supportive services to help them lead stable, successful lives. To this end, the Mifflin Street Apartments project will offer an on-site case manager to coordinate supportive services provided by The Salvation Army of Dane County. In addition, quality recreational space, clinic space, and other supportive services will be housed on campus in the neighboring shelter facility.

The project site is ideally located due to its proximity to numerous community amenities, including employment opportunities, public transit, a grocery store, schools, parks, and other basic amenities.

GOAL 2: BUILD AFFORDABLE HOUSING ON SITES THAT ARE CURRENTLY UNDERUTILIZED OR UNSIGHTLY TO REVITALIZE NEIGHBORHOODS AND PROVIDE HOUSING FOR THE VULNERABLE

TSA's Emergency Family Shelter and Emergency Women's Shelter are co-located in one building located on a 1.34-acre site at 630 East Washington Ave. Purchased in 1977 after St. Patrick's Catholic school for boys closed, TSA of Dane County immediately set to work incorporating shelter spaces in the gymnasium and on the second floor.

The facility, originally built as a school, serves an average of 130 overnight clients, which is far beyond the intended capacity. Consequently, the over-crowded facility does not have indoor space for structured activities, forcing clients to wait outside until bedtime which has caused unrest with members of the adjacent neighborhood. In addition to being ill-suited to provide the space necessary for the programs and intensive services provided by TSA's 15 case managers and 3 housing and services directors that are vital to the Madison community, the aging building exhibits visible signs of consistently serving over-capacity and general wear and tear. Beyond expensive maintenance costs, the old facility is inefficient and costly to operate. It has simply reached the end of its useful life. After utilizing the facility for the last 42 years, it is necessary to replace the facility in order to continue to provide these necessary basic human services aimed at eliminating homelessness. TSA of Dane County invites those with questions or concerns to contact them for a guided tour of the building.

As a result, TSA of Dane County has announced their intention to redevelop their existing 1.34-acre property, which includes replacing their existing Dane County Salvation Army building. TSA has acquired adjacent property to the north and northwest for an additional 0.91 acres sited with corner frontage on North Blount Street. The acquisition of the adjacent site allows TSA to create a campus comprising two main components - a services and program building and a multi-family apartment building, connected by outdoor courtyard, including an outdoor play space for children. The redevelopment will also include surface parking as well as underground parking for residents and staff members and bicycle parking.

The very nature of this project aligns with Goal #2, of deconstructing the existing dilapidated building and replacing it with affordable housing on a site that is currently underutilized or unsightly to revitalize the neighborhood and provide housing for the vulnerable. The apartment project will make a substantial investment of approximately \$40 million in a redevelopment plan in partnership with The Salvation Army (TSA), an Illinois nonprofit corporation, federal and local government entities, local community partners and non-profits.

GOAL 3: LOCATE AFFORDABLE HOUSING NEAR TRANSIT AND EMPLOYMENT HUBS

The neighborhood is well connected to all parts of the city by bus lines, major arterial roads, as well as bicycling/recreational paths. Both East Washington (two-way, three-lane each direction) and East Johnson Streets (one-way, three-lane one direction) are primary commercial thoroughfares that feature mostly locally-owned business establishments including: restaurants, neighborhood services, small markets and convenience shopping. The project site scored a 91 Walk Score.

The Beacon, a comprehensive day resource center for people who need help with employment and computer skills, is located within walking distance directly across the street at 615 East Washington Ave. Festival Foods, a family-owned supermarket chain stocking meat & seafood, produce & organic foods, is also located one block away within walking distance. Associated Bank is two blocks from the project site. Red Caboose Child Care Center is less than a half-mile away and provides a childcare center, an afterschool program, and summer camps. The nearest Madison Public Library branch and Wil-Mar Neighborhood Center are both .7 miles from the TSA site. UnityPoint Health - Meriter, the nearest full-service hospital, is less than one mile of the site, and is a major employer. A U.S. Post Office is located directly across N. Blount in the 700 block of East Washington.

If walking is not an option, the proposed site is 328 feet to the nearest transit stop at E. Washington & N. Blair (Westbound); Stop ID 1214. There is an Eastbound bus stop directly across the street on E. Washington and S. Blair; Stop ID 1579. Eight different bus routes stop at both of these locations on weekdays including route numbers 6, 14, 15, 25, 27, 37, 56, and 57. Route 6 offers the most frequent service with a bus running westbound (Stop 1214) every 15 minutes in the early morning and afternoon commute hours and then increasing to every 30 minutes at 8:50 am and 5:49 pm during weekdays. Eastbound service (Stop 1579) for Route 6 runs every 15 minutes beginning at 5:55 am and increasing to every 30 minutes at 9:34 am, as well as every 15 minutes during the afternoon commute and increasing to every 30 minutes at 6:35 pm on weekdays. Route 6 is the only bus serving these two bus stops on weekends with service every hour until 10:25 pm (Stop 1214) and 11:03 pm (Stop 1579).

Regarding schools, the project site location is 0.7 miles from Lapham Elementary, and therefore not eligible for District-provided yellow bus transportation because the site is not located more than one and one-half (1.5) miles from the attendance area elementary school. Lapham Elementary is considered to be within walking distance of the site location, four blocks from the proposed Mifflin Street Apartments. The same is true for the nearest middle school, O'Keeffe Middle School, which is located 1.4 miles from the project site. However, Metro Transit offers bus route 6 along East Washington Avenue with service to O'Keeffe Middle.

Additionally, the Transition Education Program (TEP) of the Madison Metropolitan School District currently provides transportation to the children's school of origin, and TEP will continue to transport the student to their previous school, via cab, bus, or other mode of transportation, for the school year. When a family checks in at the TSA shelter for the first time, TEP is contacted that night.

This project directly complies with Goal #3 by ensuring that both the market-rate and affordable housing is located within one-half mile of mass transit enabling residents to access low-cost transit. Additionally, TSA clients living in the apartment building will have access to the social services, dental, medical and mental healthcare services on campus, therefore would not need any type of transportation services to access these basic human need services.

GOAL 4: DECENTRALIZE SOCIAL SERVICES

In direct support of Goal #4, the proposed Mifflin Street Apartments will have a community room and an office for TSA staff to provide essential services to qualifying tenants. Additionally, the new TSA shelter facility located on the campus will be a modernized facility that will incorporate shelter services, transitional housing, and TSA administration offices. The building will have the space to provide dental, medical and mental health services. The shelter building will include a kitchen to provide meal services, a gymnasium, and space for children's activities.

GOAL 5: UPGRADE ENERGY EFFICIENCY AND SUSTAINABLE MATERIALS USE IN LOW-INCOME HOUSING

The proposed Mifflin Street Apartment project will be constructed in accordance with the Wisconsin Green Built Home Standard Multifamily requirements. It is enrolled in the Focus on Energy Multi-Family Design Assistance program.

Green Built Home™ is a national award-winning green building initiative that reviews and certifies new homes and multifamily projects that meet sustainable building and energy standards. Green Built Home is a program of Wisconsin Environmental Initiative (WEI) and is implemented in cooperation with leading utilities and organizations that promote green building.

The basic requirements of the Green Built Home™ program will be incorporated into the design and construction of the project. Those requirements include the following:

1. **BUILDING ENVELOPE:** Must be at least 3 percent more efficient than required by Wisconsin State Building Code and demonstrate compliance using the COMCheck software, computer modeling or another approved method.
2. **VENTILATION:** Building ventilation system must be designed to ASHRAE 62.1-2007 or ENERGY STAR New Homes standard (low rise projects 3 stories or less).
3. **ENERGY STAR QUALIFIED APPLIANCES:** All appliances (clothes washer, dishwasher, and refrigerator) provided must be ENERGY STAR qualified or each appliance performs in the top 50% of its Energy Guide rating.
4. **EROSION CONTROL:** Builder must complete and submit the erosion control plan checklist and comply with the erosion control plan required for building permits by the local municipality.
5. **RECYCLING:** Builder must recycle cardboard as required by state law and use at least one recycled content material (minimum 50% recycled content).
6. **TROPICAL HARDWOODS:** No Luan or other tropical hardwoods (plywood, doors, flooring, etc.) are allowed unless certified by Forest Stewardship Council, Smart Wood or approved "third party" organization.
7. **FIREPLACE SAFETY:** No fireplaces will be provided.
8. **PROGRAMMABLE THERMOSTATS:** No permanently installed mercury thermostats will be allowed. All thermostats must be programmable setback models with an "on" switch for furnace fan to circulate air (except hydronic in-floor systems).

As the project is further developed, the project team will collaboratively work together to integrate the Basic Requirements above as well as selected requirements in Sections A: Siting and Land

Use, B: Landscape Conservation and Stormwater Management, C: Energy Efficiency, D: Materials Selection, E: Indoor Air Quality, F: Plumbing and Water Conservation, G: Waste Reduction, Recycling and Disposal, H: Owner, Developer and Builder Operations, and I: Efficient Use of Space to earn a minimum of 150 points. See the attached Wisconsin Green Built Home Standard Multifamily Checklist for complete details.

Theresa Lehman, LEED Fellow, LEED AP BD+C, ID+C, WELL AP, Fitwel Ambassador, FOE TA, who is the director of sustainable services for Miron Construction Co., Inc. will lead the team in establishing the sustainable project goals and integrating the Wisconsin Green Built Home Standard Multifamily requirements into the design, construction and operation of the Mifflin Street Apartment project.

She will also do a comparison of the LEED for Multifamily, WELL Multifamily and Fitwel Multifamily requirements to the Wisconsin Green Built Home Standard Multifamily requirements and work with the team to ensure that at a minimum all of the LEED Multifamily prerequisite requirements are integrated into the design of the project, as well as review the LEED Multifamily credit requirements, WELL Multifamily requirements and Fitwel Multifamily requirements with the project team for their evaluation and consideration of integrating into the project. For example, the WELL and Fitwel Multifamily requirements include nontraditional "building" categories such as Movement and Nutrition that address items such as gardening, which is a Goal #6 action item.

Additionally, Theresa will also serve as the liaison between the project team and Focus on Energy, will develop a training program for tenants, and train the facility manager to manage and measure energy consumption.

This sustainability plan for the proposed Mifflin Street Apartment project directly supports Goal #5 as well as Goal #6.

GOAL 6: PROVIDE MORE GREEN AFFORDABLE HOUSING

The proposed Mifflin Street Apartment project directly supports the following Goal #6 Actions:

1. The project will include 37 new affordable rental units in the Tenney Lapham Neighborhood, which is 328 feet to the nearest transit stop at E. Washington & N. Blair (Westbound); Stop ID 1214. The project will transform the recently acquired underutilized 0.91 acre site as well as TSA's 1.34 acre site and dilapidated building into 44 new housing units, which will include space for TSA provided services that will be adjacent to the new TSA apartment building, which will be able to provide the programs and services as previously mentioned herein.
2. The project team is currently working with the City of Madison and Dane County, is holding neighborhood listening sessions, and is actively applying for grants/stimulus funds to begin construction of the proposed Mifflin Street Apartment project.
3. The developer entity will be The Salvation Army (TSA), an Illinois nonprofit corporation, which is responsible for all programs, services and facilities within the Army's 11-state Central Territory, which includes the State of Wisconsin. The Salvation Army Services Inc. (SASI), a wholly-owned subsidiary of TSA, will serve as general partner of the project

owner and will oversee all components of the development, construction and operations during the extended use period, including oversight of the management functions and ongoing compliance. SASI, like TSA, is an Illinois nonprofit corporation and has been the general partner in each LIHTC partnership for the projects that The Salvation Army has developed in the Central Territory. The Army's Dane County staff, headquartered in Madison, will be the primary project contact agency. TSA of Dane County will also serve as the lead agency for resident referrals and for implementing and operating the supportive services plan. The Alexander Company has been engaged by the project ownership entity for the property management services. TSA has educated their team of consultants/designers/construction manager on their existing development models that focus on a mixed-use, multi-unit housing community with support services for low-income residents on the first floor of the shelter building. TSA is in the process of educating the City of Madison, Dane County and the community.

4. The proposed Mifflin Street Apartment project will be designed and constructed to comply at a minimum with the Wisconsin Green Built Home Standard Multifamily requirements and the LEED Multifamily prerequisite and 40 points of the credits requirements. As stated above, the project team will also consider the requirements as defined in the WELL Multifamily and Fitwel Multifamily green building rating systems, which will include programmed gardening space within the project scope.
5. TSA is attempting to create new partnerships unique to the City of Madison to fund the affordable housing project. Additionally, TSA will be kicking off a capital fundraising campaign in the fall of 2019 to construct their new shelter. Their efforts will create opportunities for business leaders and community members to meet and become inspired by TSA and local non-profit organizations that partner with TSA working on social equity issues in order to gain support for investing in the emergency shelter and transitional housing initiatives. TSA will encourage community members and employees of local businesses to donate and/or volunteer to fund TSA programs and services that provide basic human need services, including in the education, training, and employment services and programs they provide for those living below the poverty level. The proposed TSA redevelopment project will provide the means for TSA to continue to provide the essential services that have been provided to the City of Madison and Dane County communities for the last 130 years.
6. TSA continues to be a staple of the Madison community, providing services and programs that "give back to the community", which supports the MPowering program for businesses.
7. TSA will present/exhibit their programs/needs to kick-off what is hoped to be a successful capital fundraising campaign in the fall of 2019 for its shelter, which provides emergency shelter services and transitional housing services, eventually leading to affordable housing opportunities for qualifying clients.
8. Theresa Lehman will work with TSA and the design/build team to develop and publicize the sustainable affordable housing concepts.
9. TSA is currently working with their internal staff, volunteers and board members, as well as volunteer PR firms to present creative fundraising campaign ideas that benefit both the recipient and the corporate giver. Details regarding the capital fundraising campaign have been previously mentioned herein.

10. The proposed Mifflin Street Apartment project is enrolled with Focus on Energy's Multifamily Design Assistance Program. Additionally, TSA may apply for FOE's RECIP grants for renewable energy technologies, as well as solicit in-kind donations during the bidding process. Grants and funding will be sought for green technologies.
11. TSA will be applying for incentives and grants from local governments, utilities, and businesses in order to showcase green technologies. For example, the project team will be approaching MG&E to discuss the possibility of electric vehicle charging stations to be installed in the underground parking and surface parking areas. They will also be discussing potential grants for energy efficient technologies and renewable energy systems. The team intends to review the U.S. DOE's Zero Energy Homes program.
12. As previously mentioned, SASI, like TSA, is an Illinois nonprofit corporation and has been the general partner in each LIHTC partnership for the projects that TSA has developed in the Central Territory. TSA Dane County is attempting to bring this development model, which has proven to support successful affordable housing strategies, from other communities to Madison.

Wisconsin Green Built Home Standard Multifamily Checklist



Green Built Home™ is a national award-winning green building initiative that reviews and certifies new homes and multifamily projects that meet sustainable building and energy standards.



Green Built Home is a program of WEI and is implemented in cooperation with leading utilities and organizations that promote green building

www.greenbulthome.org



Green Built Home Registration

Owner / Developer / Builder Name: _____

Address _____

City _____ State _____ Zip _____

Contact _____ Phone _____ Fax _____

Email _____ Web site _____

SUBMITTAL REQUIREMENTS PER HOME

Project Name _____

Site Address _____ City _____

Estimated completion date: _____

Number of Units: _____

- 1* Complete Green Built Home Checklist
- 2* Site Plan:
- 3* Provide erosion control methods and locations.
- 4* Indicate the limit of site disturbance.
- 5* Show building footprint and driveway location(s).
- 6* Architectural Floor Plans:
- 7* Floor plans drawn to scale and fully dimensioned.
- 8* Provide dimensions of roof eaves and overhangs.
- 9* Architectural Elevations:
- 10* All elevations drawn to scale.
- 11* Elevations shall show proposed finished elevation of floor and roofs on all levels.
- 12* Architectural Cross Sections:
- 13* Show cross section to provide internal detail to evaluate construction technique and materials used.
- 14* Product/Materials Information:
- 15* Provide a list of materials used for this project or a copy of the project specifications.
- 16* List of Unit Addresses:
- 17* Building Envelope Energy Efficiency:
- 18* Provide a letter, signed by the mechanical engineer or responsible party, declaring that the project is fully compliant with ASHRAE 62.1-2007 (high rise projects 4 stories or greater) or ASHRAE 62.2-2007 or ENERGY STAR New Homes standard (low rise projects 3 stories or less).

*** Payment Information: All Wisconsin Green Built Multi-family projects are subject to a Project Registration and Certification Fee. See below:**

FEE SCHEDULE

Please check one:	
<input type="checkbox"/> WHEDA LIHTC Project	<input type="checkbox"/> Non-LIHTC Project
*Project Registration/Certification:	
<input type="checkbox"/> \$70 per unit	<input type="checkbox"/> \$100 per unit
TOTAL FEE:	
\$ _____	\$ _____

****Please note: The cost of project verification is separate from the certification fee and is negotiated with each verifier.*

Please send Checklist, submittals, and payment to:

WEI — Green Built Home
16 N. Carroll Street, Suite 840
Madison, WI 53703
www.weigogreener.org

Verification and Certification:

Green Built Home and its verifier partners will review completed Checklists, plans, and specifications, conduct site visits and complete verification documentation to determine the Wisconsin Green Built Home Checklist point total and WEI will issue the Certification with the final Checklist point total to the builder/developer.

Verification may include testing and may also require that the builder provide information such as: rating certificates, spec sheets, invoices, labels, product literature, and material safety data sheets (MSDS) as documentation.



QUALIFICATIONS

To qualify for Wisconsin Green Built Certification, each multifamily project must earn a minimum of 75 points (150 points or more to earn WHEDA / LIHTC scoring credit) by meeting the specified criteria.

All projects must fulfill the Basic Requirements (no point credit) listed below and must meet the minimum point requirements in Sections B, C, D and E. The remaining points can be earned from any combination of additional checklist Sections.

Please enter the point total for each criterion selected on the line provided and enter the subtotals as directed.

BASIC REQUIREMENTS

1. BUILDING ENVELOPE: Must be at least *3 percent more efficient than required by Wisconsin State Building Code and demonstrate compliance using the COMCheck software, computer modeling or another approved method. COMCheck is available on the web at www.energycodes.gov

*If 3% cannot be achieved, applicant will provide a letter that describes best efforts AND describes greater than normal efficiency of ancillary items such as: window replacement "U" value, insulation "R" value, heating systems and lighting systems used in the development and must use building renovation components which meet the ENERGY STAR™ or equivalent building standards.

2. VENTILATION: Building ventilation system must be designed to ASHRAE 62.1-2007 (High rise projects 4 stories or greater) or ASHRAE 62.2-2007 or ENERGY STAR New Homes standard (low rise projects 3 stories or less). A letter, signed by the mechanical engineer or responsible party, declaring that the project is fully compliant must be submitted. *Alternative Option: All bathrooms have an installed Energy Star bath fan airflow >50 cfm and/or fan sized to ASHRAE 62.2. Stack ventilation units with multiple pick-ups should have >20 cfm continuous flow.

3. ENERGY STAR QUALIFIED APPLIANCES: All appliances (clothes washer, dishwasher, and refrigerator) provided must be ENERGY STAR qualified or each appliance performs in the top 50% of its Energy Guide rating. If appliances are not included, a list of ENERGY STAR appliances is provided. For lists of Energy Star rated appliances see www.energystar.gov.

4. EROSION CONTROL: *Builder must complete and submit the erosion control plan checklist and comply with the erosion control plan required for building permits by the local municipality.

*Note: 5 additional points available for projects that earn Clean Clears Waters Checklist Certification – www.cleanclearwaters.org

5. RECYCLING: Builder must recycle cardboard as required by state law and use at least one recycled content material (minimum 50% recycled content).

6. TROPICAL HARDWOODS: No Luan or other tropical hardwoods (plywood, doors, flooring, etc.) are allowed unless certified by Forest Stewardship Council, Smart Wood or approved "third party" organization.

7. FIREPLACE SAFETY: Gas fireplaces must be direct vent only with outside combustion air, wood fireplaces must have sealable, gasket doors and be fitted with outdoor combustion air, or no fireplaces provided.

8. GREEN BUILT HOME INFORMATION AND PROJECT GUIDES: WEI provides up-to-date information so homeowners can make the most informed decisions:
Visit www.greenbuilthome.org

9. GREEN BUILT CERTIFICATE AND/OR GREEN BUILT LOGO DISPLAYED ON THE PROPERTY OR WEBSITE: The Green Built Certificate will be prepared by the GBH program and provided to the owner/developer/builder as part of the certification process.

10. PROGRAMMABLE THERMOSTATS: No permanently installed mercury thermostats are allowed. (Includes Rehab and Remodeling projects) All thermostats must be programmable setback models with an "on" switch for furnace fan to circulate air (except hydronic in-floor systems)

Each registered project MUST meet all the Basic Requirements and accumulate a minimum total of 75 points (150 points or more to earn WHEDA / LIHTC scoring credit)

Each item is valued at (1), (2), (3), (4), or (5) points. Please check all that apply and note the point totals on the line provided.

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SECTION A: SITING AND LAND USE

- 1. **(2)** Project built on an infill lot in an existing established neighborhood.
- 2. **(3)** Project built in a brownfield (land re-use) development.
- 3. **(1)** Project located within 0.5 miles of a bus stop, bike route, or transit stop.
- 4. **(1)** Project located within 0.5 miles of shopping/offices/retail or Main Street district.
- 5. **(1)** Project located within 0.5 miles of a school.
- 6. **(1)** Project located in a Traditional Neighborhood Development (TND).
- 7. **(1)** Project located in a conservation minded or low impact development.
- 8. **(1)** No surface parking. All parking provided is in a structure and/or on street.
- 9. **(1)** Communal courtyard, patio, porch or deck located on south side of building to create sunny, wind sheltered outdoor space.
- 10. **(1)** Screened porch is provided to create an unconditioned, sheltered outdoor space.
- 11. **(1)** Project located in a LEED-ND certified development.
- 12. **(1)** Non-residential use(s) provided on site (office, commercial, etc.)
- 13. **(1)** Secure bicycle storage facilities provided onsite.
- 14. **(1)** Cluster buildings and design roadways and parking to preserve open space.
- 15. **(1)** Size parking capacity to meet, but not exceed, minimum local zoning requirements.
- 16. **(5)** Adaptive building reuse or guy rehab
- 17. **(2)** Electric vehicle charging station
- 18. **(2)** Project located within 0.5 miles of Community Gardens
- 19. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

SECTION A Subtotal _____

SECTION B: LANDSCAPE CONSERVATION AND STORMWATER MANAGEMENT

(At least 3 points required for all projects)

- 1. **(1)** Use of redundant straw bale and silt fencing in areas with steep slopes (greater than 12% grade) or areas of concentrated runoff flow.
- 2. **(1)** Protect on-site storm sewer inlets with straw bales, silt fencing or equivalent measures.
- 3. **(1)** Save and reuse all site topsoil.
- 4. **(1)** Trees and natural features on site protected during construction.
- 5. **(1)** Building placement saves east and south lot areas for outdoor use.

- 6. **(1)** Chip and reuse site-cleared wood and brush as mulch.
- 7. **(1)** Wash out concrete trucks in slab or pavement sub-base areas.

List location _____

- 8. **(1)** Balance cut and fill to eliminate earth removal from site.
- 9. **(2)** Replant or donate live trees from the site.
- 10. **(2)** Site disturbance limited to within 40 feet of structures and paved areas.
- 11. **(2)** Permeable materials such as brick pavers, flagstones, porous paving or limestone fines for 40% of all walkways, patios, driveways and surface parking areas.
- 12. **(2)** Impervious surfaces cover less than 25% of the building site
- 13. **(1)** Grass that uses less water such as blue gamma, fescue, or 'no-mow' min. 75% of turf areas. List type/supplier _____
- 14. **(1)** Native landscape planting min. 20% of non-paved areas
List landscape contractor _____
- 15. **(2)** Native landscape planting min. 40% of non-paved areas
List landscape contractor _____
- 16. **(3)** Native landscape planting min. 60% of non-paved areas.
List landscape contractor _____
- 17. **(2)** Rainwater recovery from roof for watering, min. 500 gal. storage capacity.
- 18. **(3)** Provide infiltration system for rooftop run off (e.g. rain gardens, drain tile, bioswales, ponds, etc.).
- 19. **(1)** Edible landscape planting/community garden areas provided.
- 20. **(1)** Limit turf grass other than 'no mow' mixes or prairies to 25% of landscaped area.
- 21. **(2)** No turf grass other than 'no mow' mixes or prairies.
- 22. **(1)** Installed irrigation system includes a soil moisture or rain sensor or is a drip type system.
- 23. **(1)** Installed irrigation system is zoned separately for turf and bedding areas.
- 24. **(1)** Restore damaged ecosystem such as existing prairies or wetlands.
- 25. **(1)** Participate in a wildlife conservation program.
- 26. **(4)** Installed vegetated or "green" roof system min. 400 sq. ft. or > 20% of the roof area, whichever is greater.
- 27. **(1)** Establish and maintain a single stabilized construction entrance.
- 28. **(1)** Provide onsite supervision and coordination during site clearing, grading, trenching, paving, and installation of utilities to ensure that green building measures are implemented.
- 29. **(1)** Use of recycled materials in lieu of silt fencing.
- 30. **(1)** On-call personnel designated for erosion control



- 31. **(5)** Earn Clean Clear Waters Checklist Certification (www.cleanclearwaters.org)
- 32. **(2)** Label all storm drains to discourage dumping of pollutants
- 33. **(1-5)** Utilize an approach not listed that meets the goals of this section.
List approach _____

SECTION B Subtotal _____

SECTION C: ENERGY EFFICIENCY

(At least 15 points required for all projects, including at least 5 points from Lighting & Electrical Systems)

SITE DESIGN

- 1. **(2)** Building oriented with long dimension facing within 15 degrees of south
- 2. **(1)** Building massing respects solar access of adjacent properties.
- 3. **(1)** Structured parking sited between residential units and prevailing winter winds to act as a buffer (parking structure to the north or west of units).
- 4. **(1)** New deciduous trees provided on south side or evergreens on west side of building such that when mature they will shade at least half of the residential units. Native species, min. 2.5" caliper, 3'-0" high.
- 5. **(1)** Measures taken to mitigate the urban heat island effect (one point for each measure)
 - Light-colored paving material with an albedo of 0.30 or greater
 - Open grid paving system
 - No above grade parking provided on site
 - Provide shade with trees, overhangs and building elements that cover 30% or more of all hard surface paving
 - Cool roof (reflectance greater than 0.75 and emittance greater than 0.70)
- 6. **(1-5)** Utilize an approach not listed that meets the goals of this section.
List approach _____

INSULATION AND AIR SEALING

- 7. **(1)** Energy heels of 7" or more on trusses.
- 8. **(1)** Advanced sealing package in addition to basic sealing practices (sealing at top and bottom plates, corners and between cavities at penetrations).
- 9. **(1)** Blower door test with 0.15 CFM/sq.ft. or less average for all units - determined at completion of building. At least 2 of each unit type must be tested.
- 10. **(1)** Blower door test with 0.10 CFM/sq.ft. or less average for all units - determined at completion of building. At least 2 of each unit type must be tested.

- 11. **(1)** Sill plate sealed with caulk (sill plate to foundation and rim to sill plate).
- 12. **(1)** Gaps between can light housings and drywall caulked.
- 13. **(1)** Gaps between exhaust fan housings and drywall caulked.
- 14. **(1)** All penetrations to the exterior are sealed both inside and outside.
- 15. **(1)** Can lights in insulated ceilings are sealed and insulated.
- 16. **(1)** Utilize an approach not listed that meets the goals of this section.
List approach _____

GLAZING

- 17. **(1)** Windows throughout are ENERGY STAR qualified or have a U value ≤ 0.35 (NFRC label)
List manufacturer _____
- 18. **(2)** Windows throughout have a U value ≤ 0.26 (NFRC label).
List manufacturer _____
- 19. **(1)** Windows throughout have an air leakage rating ≤ 0.06 cfm/ft.
List manufacturer _____
- 20. **(1)** No metal frame windows in building, including basements, unless thermally broken.
- 21. **(1)** East facing glass NFRC label solar heat gain coefficient (SHGC) less than 0.40.
List manufacturer _____
- 22. **(1)** West facing glass NFRC label solar heat gain coefficient (SHGC) less than 0.40.
List manufacturer _____
- 23. **(2)** South glass shaded by exterior shading in May, June and July at 12 noon.
- 24. **(1)** Use clerestory windows for natural lighting.
- 25. **(1-5)** Utilize an approach not listed that meets the goals of this section.
List approach _____

MECHANICAL SYSTEMS

- 26. **(1)** Install a 90%-94% efficiency furnace (ENERGY STAR label encouraged)
List manufacturer/model # _____
- 27. **(2)** Install a 95% or higher efficiency furnace (ENERGY STAR label encouraged).
List manufacturer/model # _____
- 28. **(1)** Furnace located to minimize total length of duct runs.
- 29. **(1)** Install a 92% or higher efficiency condensing boiler.
- 30. **(1)** No use of electric radiant heating.
- 31. **(2)** Variable speed fans, motors, pumps and/or blowers.



- 32. (2) Document selection of fans and pumps with minimum horsepower required for the application.
- 33. (1) High efficiency air conditioner or heat pump (ENERGY STAR qualified, SEER 14+ or COP 4.5+) if A/C provided.
List manufacturer/model # _____

- 34. (1) No use of CFC-based refrigerants in building HVAC&R systems.
- 35. (1) No ductwork located in unconditioned space or exterior walls.
- 36. (1) Ductwork in unconditioned space or exterior walls insulated (R-13 min.)
- 37. (1) Duct design complies with Manual D or equivalent.
- 38. (2) HVAC supplies and returns are fully ducted (no use of building cavities).
- 39. (1) All ductwork joints sealed (mastic or aluminum tape)
- 40. (2) Airflow for each duct run measured and balanced to within 15 cfm of design value.
- 41. (1) Two properly supported ceiling fans installed in each unit (ENERGY STAR label encouraged).
- 42. (1) Ceiling fan pre-wires provided in habitable rooms (min. 2 prewires per unit not including bedrooms).
- 43. (2) Heat Recovery Ventilator (HRV) installed.
List manufacturer _____
- 44. (3) Energy Recovery Ventilator (ERV) installed.
List manufacturer _____
- 45. (3) Geothermal heat pump. (ENERGY STAR labeled encouraged).
List contractor _____
- 46. (1-5) Zoned HVAC system (each unit has more than one zone) (1 point per additional zone).
- 47. (4) No air conditioning.
- 48. (2) Whole building Energy Management System (EMS) installed.
- 49. (2) Document proper sizing of HVAC system using Manual J or equivalent.
- 50. (1) High efficiency fireplace such as direct vent gas, Rumford, or masonry heater or no fireplace installed for all units.
- 51. (1) Parking structure is naturally ventilated or uses demand-control ventilation
- 52. (1) Gearless elevators or biodegradable lubricating oils used
- 53. (1-5) Utilize an approach not listed that meets the goals of this section.
List approach _____

APPLIANCES

- 54. (1) Provide gas rough-ins for appliances in all units.
- 55. (1) All units have appliances performing in top 15% of the Energy Guide rating (score one point for each qualified appliance). dishwasher refrigerator

- washing machine Microwave Other:
list _____

- 56. (1) Provide an exterior clothesline in common space.
- 57. (1-5) Utilize an approach not listed that meets the goals of this section.
List approach _____

LIGHTING & ELECTRICAL SYSTEMS

- 58. (1) Light-colored interior walls, ceiling and soffit. Mid tone to light color flooring/carpet (min. 75%).
- 59. (1) Install ENERGY STAR qualified light fixtures (min 4 fixtures per unit).
- 60. (1) Furnish five LED or compact fluorescent light bulbs to each homeowner. (ENERGY STAR labeled encouraged).
- 61. (1) Compact or linear fluorescent or LED lighting in place of incandescent down lights.
- 62. (1) Install lighting dimmers, timers, or motion detectors (min. 4 fixtures per unit).
Indicate location _____
- 63. (1) Motion detector activators or photocells/ timers on all exterior lighting.
- 64. (1) Occupancy sensors used in common areas.
- 65. (1) Occupancy sensors used in parking garage areas.
- 66. (1) Daylighting control sensors used in common areas.
- 67. (1) Solar powered walkway or outdoor area lighting (min. 6 fixtures).
- 68. (1) Solar tubes for interior daylighting.
- 69. (5) Solar electric (photovoltaic) system installed (3 pts per kW of generation capacity).
- 70. (4) Provide at least 4000 sq. ft. or 400 sq. ft. per unit of roof area that is within 15 degrees of south and tilting between 20 and 70 degrees from the horizontal for a future solar electric system. The roof area should be less than 5% shaded over an annual basis. Also install a conduit from the attic to the utility panel that is clearly labeled "future solar electric system wiring" for easy identification at a later date.
- 71. (3) No can lights in insulated ceiling.
- 72. (3) Each unit has an ENERGY STAR Advanced Lighting Package (ALP).
- 73. (2) Exterior lighting complies with Illuminating Engineering Society of America (IESNA) guidelines to minimize glare and light pollution
- 74. (1) LEDs used for exit signs throughout building.
- 75. (2) LEDs used in lieu of CFLs or incandescent for general, task or accent lighting
- 76. (5) Fuel cell installed for electricity generation (5 pts per 5 kW of generation capacity).
- 77. (1-5) Utilize an approach not listed that meets the goals of this section.
List approach _____

INTEGRATED CLIMATIC DESIGN

- 78. (4) Passive solar heating design package (includes orientation, south glazing/ floor area ratio, orientation specific low-e tuning, summer shading, and thermal mass design).
- 79. (4) Passive cooling design package (includes orientation, summer shading, thermal mass, attic ventilation, additional ceiling fans, heat recovery ventilation and natural ventilation design).
- 80. (3) Low rise project is ENERGY STAR New Homes certified.
- 81. (5) Project is LEED certified
- 82. (2) Project achieves energy savings of 20-30% above code/ ASHRAE 90.1
- 83. (3) Project achieves energy savings of 31-40% above code/ ASHRAE 90.1
- 84. (4) Project achieves energy savings of 41-50% above code/ ASHRAE 90.1
- 85. (5) Project achieves energy savings of 51%+ above code/ ASHRAE 90.1
- 86. (1-5) Utilize an approach not listed that meets the goals of this section.

List approach _____

SECTION C Subtotal _____

SECTION D: MATERIALS SELECTION

(At least 6 points required for all projects)

EXTERIOR

- 1. (1) Masonry and stone salvaged.
List sources _____
- 2. (1) Masonry and stone regionally produced (within 500 miles).
List supplier _____
- 3. (1) Decks, site furnishings and other outdoor structures constructed with sustainable, low-toxicity materials: reused wood, certified sustainable yield wood, or recycled plastic/ wood fiber composites.
- 4. (1-5) Utilize an approach not listed that meets the goals of this section.

List approach _____

BELOW GRADE

- 5. (1) Recycled fly ash concrete (min. 15% fly ash content).
List contractor _____
- 6. (2) Cast-in-place insulating concrete forms.
- 7. (3) Insulated pre-cast concrete foundation systems.
- 8. (2) Cast in place footing forms with integral drainage features.

List product _____

- 9. (1) Reusable foundation forms used to reduce waste (e.g. metal rather than site built wood forms).
- 10. (1) Low toxicity form release agents used on concrete form work.
List product _____
- 11. (1) Non-asphalt based damp proofing.
List product _____
- 12. (1) Water based waterproofing systems.
List product _____
- 13. (1) Reusable foundation bracing not constructed of framing lumber used.
- 14. (1-5) Utilize an approach not listed that meets the goals of this section.

List approach _____

STRUCTURAL FRAME

- 15. (1) Provide weather protection for stored materials.
- 16. (1) No use of 2x10 or greater dimension solid lumber in floors or roof systems.
- 17. (1) Use prefabricated insulated headers.
- 18. (1) Engineered wood "I" joists or truss joists used for floors.
- 19. (1) Trusses or "I" joists used for roofs.
- 20. (1) Engineered lumber products for beams, joists or headers.
- 21. (1) Finger-jointed studs, engineered stud material, or plate materials.
- 22. (4 points possible) Optimum Value Engineering (O.V.E) advanced framing package (e.g. 24" O.C. studs, 3 stud corners, etc.) as developed by the NAHB. For every three strategies selected receive 1 pt:
 - frame greater than 16" centers, single top plate,
 - optimized header sizes, 2'-0" framing module,
 - centralized cutting areas, detailed job-site framing plans, two stud corners, ladder backing/ drywall clips, header hangers, reduced cripples/ jacks,
 - optimized sheathing, reduced waste factor
- 23. (3) Use of reused timber or framing lumber (min. 25% lumber usage).
- 24. (2) Use of energy efficient 2x4 exterior wall system.
- 25. (2) Use of panelized construction
- 26. (4) Use of alternative building systems with significant environmental performance features such as SIPS, ICFs, Faswall, Autoclaved Aerated Concrete
List product _____
- 27. (2) Structural wood that is regionally grown, milled, and produced (at least 50% of wood used).
- 28. (3) Structural wood from (FSC, Smart Wood or equivalent) certified sustainably managed forests (at least 50% of wood used).
- 29. (1) Advanced rim joist insulation (prefabricated insulated rim joist, spray foam insulation, or other similar technique).



- 30. **(1)** Recycled content steel framing with adequate thermal break used instead of wood
- 31. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

ENVELOPE, WALLS & CEILING

- 32. **(1)** Large roof overhangs to extend life of siding finishes: 24" horizontal projection min.
- 33. **(1)** Use of non-sealed insulating glazing or sash designs that allow for insulated glazing unit replacement without requiring sash replacement.
- 34. **(1)** Fiber-cement or wood composite siding (min. 25% of siding used).
- 35. **(2)** Recycled content sheathing (min. 50% pre- or post-consumer recycled content)

List product _____

- 36. **(1)** Recycled content siding (min. 50% pre-consumer)
- List product _____

- 37. **(2)** Recycled content siding (min. 50% post-consumer).
- List product _____

- 38. **(1)** Recycled content fascia, soffit, or trim (min. 50% pre-consumer)
- List product _____

- 39. **(2)** Recycled content fascia, soffit, or trim (min. 50% post-consumer).
- List product _____

- 40. **(1)** Metal siding with long-life factory finish (min. 25% of siding used).
- 41. **(1)** Natural cementitious stucco.
- 42. **(2)** Continuous drainage plane behind siding.
- 43. **(3)** Vented rain screen behind siding.
- 44. **(2)** Drywall with 90+% recycled-content gypsum.
- 45. **(1)** High strength 1/2 inch drywall substituted for 5/8" drywall on ceilings.

List product _____

- 46. **(3)** Plywood, OSB, or other sheathing from (FSC, Smart Wood or equivalent) certified sustainably managed forests (at least 50% of sheathing used).
- 47. **(2)** No vinyl siding, soffit, fascia, trim, or windows.
- 48. **(1)** Factory finished wood, fiber cement, or composite siding.
- 49. **(1)** Siding and exterior trim primed on all sides.
- 50. **(1)** Brick or stone siding on 50% or more of the building's exterior.
- 51. **(1)** Flexible, self adhering rubber flashing installed around all windows and integrated with drainage plane.
- 52. **(1)** Insulated sheathing used.
- 53. **(2)** Acoustical ceiling tiles containing at least 50% recycled content used.
- 54. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

INSULATION

- 55. **(1)** Recycled content insulation (min. 25% recycled content and min. 50% of insulation).
- List product _____
- 56. **(2)** Blown/sprayed-in insulation used at walls.
 - 57. **(3)** Natural insulation (cotton, bio-based foam, etc) used (min. 50% of insulation).
 - 58. **(1)** Below slab insulation installed.
 - 59. **(1)** Exterior foundation walls insulated with min. 1" of foam insulation.
 - 60. **(2)** Exterior foundation walls insulated with min. 2" of foam insulation.
 - 61. **(1)** Variable permeance or "smart" vapor retarder installed.
 - 62. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

ROOF

- 63. **(1)** Recycled content roofing material (min. 25% recycled content).
- List product _____
- 64. **(2)** Minimum 40 year roofing material.
 - 65. **(3)** Minimum 50 year roofing material including asphalt, concrete, slate, clay, composition, metal, rubber or fiberglass.
 - 66. **(3)** Plywood, OSB, or other roof decking from (FSC, Smartwood or equivalent) certified sustainably managed forests (at least 50% of decking used).
 - 67. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

SUB-FLOOR

- 68. **(1)** Recycled content underlayment (100% of underlayment used).
- List product _____
- 69. **(3)** Plywood or other subfloor from (FSC, Smart Wood or equivalent) certified sustainably managed forests.
 - 70. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

FINISH FLOOR

- 71. **(1)** Bamboo flooring (min. 100 sq. ft. per unit or 1,000 sq. ft. total).
- 72. **(1)** Cork flooring (min. 100 sq. ft. per unit or 1,000sq.ft. total).
- 73. **(2)** Flooring made from reclaimed (recycled) wood (min. 50% of wood flooring).
- 74. **(2)** Recycled content ceramic tile — (min. 50% of tile used).
- 75. **(2)** Salvaged stone or masonry flooring.
- 76. **(1)** Recycled content carpet pad (100% of pad used).



- 77. (1) Recycled content carpet - tacked not glued (min. 50% of carpet used).
- 78. (2) Carpet provided by a company that agrees to take it back for recycling at the end of its useful life.
- 79. (3) Flooring from (FSC, Smart Wood or equivalent) certified sustainably managed forests (min. 50% of wood flooring).
- 80. (2) No vinyl flooring or base trim.
- 81. (1-5) Utilize an approach not listed that meets the goals of this section.

List approach _____

DOORS, CABINETRY AND TRIM

- 82. (1) Recycled content doors or MDF.
- List manufacturer _____
- 83. (1) Domestically grown interior wood panel doors.
 - 84. (1) Finger jointed trim or MDF (min. 75% of trim stock).
 - 85. (1) Domestic hardwood trim (min. 75% of trim stock).
 - 86. (1) Recycled content countertops (e.g. Environ, Richlite).
 - 87. (1) Concrete, regionally produced, or regionally quarried countertops.
 - 88. (2) Use of reused hardwood trim, cabinets, and/or doors (min. 25% of stock).
 - 89. (3) Trim from (FSC, Smart Wood or equivalent) certified sustainably managed forests (min. 50% of wood trim).
 - 90. (3) Finish grade plywood from (FSC, Smart Wood or equivalent) certified sustainably managed forests (min. 50% of finish plywood).
 - 91. (3) Interior common area furniture from (FSC, Smart Wood or equivalent) certified sustainably managed forests (min. 50% of common area interior furniture).
 - 92. (2) Wheat or strawboard materials used in place of particleboard.
 - 93. (1-5) Utilize an approach not listed that meets the goals of this section.

List approach _____

SECTION D Subtotal _____

SECTION E: INDOOR AIR QUALITY

(At least 5 points required for all projects)

- 1. (1) Take measures to avoid air pollution or IAQ problems due to construction dust.
- 2. (1) Specify a three-component track-off entryway system that consists of a permeable outdoor mat or grill, indoor mats and a smooth surface, waterproof flooring material that is easily cleaned.
- 3. (2) Parking areas physically separated from building.

- 4. (1) Measures taken to reduce carbon monoxide infiltration using one of the following four methods (maximum of one point).
 - continuous air barrier separation
 - weather-sealed door(s)
 - exhaust fan(s) in garage on timer or wired to door opener
 - garage ventilated to neutral pressure
- 5. (1) Foundation drainage system tied to sealed sump pit for potential radon mitigation.
- 6. (1) Locked, vented chemical storage cabinet provided outside of living space.
- 7. (1) Operable windows on two walls for rooms with two exterior wall surfaces.
- 8. (1) High efficiency media air cleaner such as April Aire 2200/2250/2400.
- 9. (1) Furnace and /or duct mounted electronic air cleaner such as April Aire 5000.
- 10. (1) Furnace and /or duct mounted HEPA filter.
- 11. (2) All ductwork joints sealed with water based, low V.O.C. mastic (< 30g/l) or metalized tape.
- 12. (3) Hydronic heating system (serving min. 75% of conditioned space per unit).
- 13. (1) Central vacuum system vented to the exterior (excludes garage).
- 14. (1) ENERGY STAR qualified residential ventilating (bath) fans used throughout.

List manufacturer/model # _____

- 15. (1) Automatic tub/shower room fan controls such as timers or humidistats in all units.
- 16. (1) Bath fans installed with smooth ducting with short, straight runs.
- 17. (1) Spring loaded, weather stripped fan dampers installed.
- 18. (2) Whole building dehumidification system installed.
- 19. (1) Use environmentally friendly cleaning products for ongoing building maintenance
- 20. (1) Ventilate the building after each new finish is applied.
- 21. (1) Clean ducts and furnace thoroughly just before the occupants move in.
- 22. (1) Washed stone installed under basement slab for potential radon mitigation.
- 23. (1) Rough-in venting provided for potential radon mitigation.
- 24. (1) UV light in supply duct.
- 25. (1) Carbon Monoxide detector installed in each unit with combustion appliance.
- 26. (1) Ventilation in common areas controlled by Carbon Monoxide detectors.
- 27. (3) All exhaust fan flows are tested prior to occupancy.
- 28. (2) Design ventilation systems to exceed ASHRAE 62.2 standards by at least 25%



- 29. Minimize exposure to Environmental Tobacco Smoke (ETS). 1 point for each measure.
 - Prohibit smoking in all common areas of the building
 - Prohibit smoking outside within 25 feet of entries, outside air intakes and operable windows
 - Minimize ETS transfer between units by sealing all penetrations and chases
- 30. **(1-5)** Utilize an approach not listed that meets the goals of this section.
List approach _____

IAQ MATERIALS

- 31. **(2)** Formaldehyde-free insulation.
- 32. **(1)** GreenGuard or equivalent certified low formaldehyde insulation.
- 33. **(1)** Batt insulation that is encapsulated or otherwise non-irritating.
- 34. **(2)** Non-toxic spray foam insulation.
- 35. **(1)** Urea formaldehyde-free sub-floor and underlayment material.
List product _____
- 36. **(2)** Use of hard surface floors such as wood, concrete, tile or linoleum (min. 50% of floor area).
- 37. **(3)** Use of hard surface floors such as wood, concrete, tile or linoleum (min. 90% of floor area).
- 38. **(2)** Natural linoleum with low toxic adhesives and backing in place of all vinyl flooring.
- 39. **(2)** Natural material carpet (wool, sisal, etc) - tacked not glued (100% of carpet used).
- 40. **(1)** Natural material carpet padding (natural rubber, wool, 100% of padding used).
- 41. **(1)** Carpet and Rug Institute Green Label IAQ label on all carpet used.
- 42. **(2)** Carpet and Rug Institute Green Label +Plus IAQ label on all carpet used.
- 43. **(1)** Hardboard content doors with MDI or non-toxic binders.
List supplier/product _____
- 44. **(1)** All cabinets, shelves, and countertops made with formaldehyde free materials: solid wood, formaldehyde free particleboard or MDF (medium density fiberboard), metal with natural or baked enamel factory finish.
List supplier/product _____
- 45. **(1)** All exposed particleboard containing formaldehyde sealed with non-toxic sealer.
- 46. **(1-5)** Utilize an approach not listed that meets the goals of this section.
List approach _____

IAQ FINISHES AND ADHESIVES

- 47. Low V.O.C paints (<100 g/l) used throughout. One point each: interior primer, interior finish, exterior primer, exterior finish
List supplier/product _____
- 48. Certified low or zero V.O.C. Paints used throughout. Two points each: interior primer, interior finish, exterior primer, exterior finish
List supplier/product _____
- 49. Water based, "low V.O.C." adhesives used throughout. One point each: construction adhesive, cove base adhesive, PVC adhesive, thinset mortar, other:
List supplier/product _____
- 50. **(1)** Water-based urethane finishes on wood floors.
- 51. **(1)** Water-based finishes on woodwork.
- 52. **(1)** Supply workers with V.O.C. safe masks if using high V.O.C materials
- 53. **(1-5)** Utilize an approach not listed that meets the goals of this section.
List approach _____

SECTION E Subtotal _____

SECTION F: PLUMBING AND WATER CONSERVATION

- 1. **(1)** Front loading, horizontal axis clothes washers in each unit and/or laundry facilities.
- 2. **(1)** Common area laundry facilities provided in lieu of in-unit laundry facilities.
- 3. **(1)** Select bathroom faucets with GPM less than code or Watersense labeled or install low-flow aerators.
- 4. **(1)** Select kitchen faucets with GPM less than code or Watersense labeled or install low-flow aerators.
- 5. **(1)** Select showerheads with GPM less than code or Watersense labeled or install low-flow aerators
- 6. **(1)** Manifold plumbing system with PEX tubing.
- 7. **(2)** Composting toilet.
- 8. **(2)** Rough-in for future greywater recovery system.
- 9. **(4)** Greywater recovery system installed.
- 10. **(1)** No garbage disposals.
- 11. **(2)** No PVC piping for drains, wastes and vents.
- 12. **(1)** All showers are equipped with only one showerhead.
- 13. **(1)** Dual flush or ultra low flow toilets with GPM less than code or Watersense labeled



- 14. **(1)** Passive or loop hot water delivery system installed at farthest location from water heater (lines must be insulated).
- 15. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

WATER HEATING

- 16. **(3)** Gas water heater with energy factor of more than .62 for direct vented.
- List manufacturer/model # _____

- 17. **(3)** High efficiency central domestic hot water heating system.
 - 18. **(2)** No use of electric domestic hot water heating equipment.
 - 19. **(1)** Water heater within 20 pipe feet of dishwasher and clothes washer.
 - 20. **(1)** All other fixtures within 20 pipe feet of water heater or provide heat trap.
 - 21. **(2)** Insulate all hot water lines to minimum R-4.
 - 22. **(1)** Insulate hot and cold water pipes 3 feet from the hot water heater.
 - 23. **(3)** On-demand (tankless) hot water delivery system.
- List manufacturer _____
- 24. **(1)** Water heater heat pump.
- List manufacturer _____
- 25. **(3)** Drain water heat recovery unit installed.
 - 26. **(2)** Combined high efficiency domestic hot water/ space heating system.
 - 27. **(2)** Provide south roof area for future solar domestic hot water heating system (min. 300 sq. ft. or 30 sq .ft. per unit within 15 of south with the panels 20-60 degrees from the horizontal) and plumbing rough-in for solar water heating system (separate cold water supply plumbed to roof and hot water return plumbed to water heater).
 - 28. **(4)** Active solar domestic hot water heating system installed (Min. 25% of water heating load). Count F.27 or F.28 not both.
 - 29. **(1)** Water heater timer installed.
 - 30. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

SECTION F Subtotal _____

SECTION G: WASTE REDUCTION, RECYCLING AND DISPOSAL

(At least 1 point required for all projects in addition to items required by state law)

- 1. **(1)** Posted job site recycling plan.
- 2. Recycle or reuse job site waste, 1 point for each material category:
 glass, aluminum cans and plastic bottles (required by state law, no point)
 - asphalt roofing (75% landfill diversion)
 - wood scraps (75% landfill diversion)
 - pallets (75% landfill diversion)
 - metal (75% landfill diversion)
 - gypsum wall board (75% landfill diversion)
 - brick and block (75% landfill diversion) cardboard (required by state law, no point)
 - other-list approach _____
- 3. **(1)** Obtain products from suppliers that use recyclable or reusable packaging or arrange to take back their packaging.

List supplier(s) _____

- 4. **(1)** Reuse or recycle asphalt or concrete rubble.
- 5. **(2)** Require subcontractors (contract language) to participate in waste reduction and recycling efforts.
- 6. **(1)** Dispose of non-recyclable hazardous wastes at legally permitted facility.

List waste _____

- 7. **(1)** Install common area recycling center for homeowners' use.
- 8. **(1)** Built-in kitchen recycling center to include two or more bins in every unit.
- 9. **(1)** Provide kitchen scrap compost bin in all units.
- 10. **(2)** Track and prominently post waste reduction results on site.
- 11. **(1)** On site grinding of wood construction debris.
- 12. **(1)** Document substantial design strategies to reduce waste from construction.
- 13. **(2)** Design for disassembly, reuse, and recyclability.
- 14. **(1)** Donate excess materials to a non-profit organization or charity.
- 15. **(5)** Disassemble existing buildings and reuse or recycle the building materials (deconstruction) instead of demolishing (at least 75% landfill diversion).
- 16. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

SECTION G Subtotal _____

SECTION H: OWNER, DEVELOPER AND BUILDER OPERATIONS

- 1. **(1)** At least 80% of projects built to Green Built Home standards annually.
- 2. **(1)** At least one recent action taken to visibly market Green Built Home program.

List action, location, and date _____

- 3. **(1)** Conduct homebuyer orientation during final walk-through (point out Green Built features, how to maintain them, operate them, etc).
- 4. **(1)** At least one recent training event conducted for realtors or sales staff.
- 5. **(3)** Provide homebuyers with guaranteed energy bills at least 25% below the average of that for a typical new home of the same square footage and features.
- 6. **(1)** Owner, developer and/or builder attendance at one recent green building related educational event.

List action, location, and date _____

- 7. **(1-3)** Owner, developer and/or builder's own idea for innovation, education, and encouraging homeowners to take care of their home in an environmentally friendly way (Ex. Provide homeowners with environmentally friendly cleaning products).

List idea _____

- 8. **(1)** Establish a "Green Team." Identify employees and/or subcontractors, their roles and how they relate to various phases of green development and building.
- 9. **(1)** Create and implement an integrated design process to increase communication between the owner, design team, general contractor, subcontractors, the city's building department and other stakeholders.
- 10. **(1)** Provide homeowner with information and enrollment materials for the local utility's renewable energy program.
- 11. **(3)** Provide at least 50% of the buildings electricity from the local utility's renewable energy program.
- 12. **(3)** Provide the buyers with the first year enrollment costs of 100% of electricity provided by the local utility's renewable energy program.
- 13. **(1)** Use suppliers whose operations and business practices include environmental management system concepts (the product, plant, or company must be ISO 14001 or equivalent certified). 1 point per supplier, min. 50% of purchased material coming from each supplier.

List supplier(s) _____

- 14. **(1)** Use products that are Cradle to Cradle Certified. 1 point per product.

List product(s) _____

- 15. **(3)** Owner, developer and/or builder's own operations and business practices include environmental management system concepts (the builder must be Green Tier, ISO 14001 or equivalent certified).

- 16. **(5)** Perform and review a life cycle assessment (LCA) to compare the environmental effects of building materials and home designs.
- 17. **(3)** Building systems commissioning conducted.
- 18. **(1)** Each homeowner provided with an operations and maintenance manual.
- 19. **(1)** Develop and implement a Measurement and Verification plan to provide accountability of building energy use over time
- 20. **(1-5)** Utilize an approach not listed that meets the goals of this section

List approach _____

SECTION H Subtotal _____

SECTION I: EFFICIENT USE OF SPACE

- 1. **(1)** Above Grade finished and conditioned space averages 2500-2250 sq.ft. per unit
- 2. **(2)** Above Grade finished and conditioned space averages 2249-2000 sq.ft. per unit
- 3. **(3)** Above Grade finished and conditioned space averages 1999-1750 sq.ft. per unit
- 4. **(4)** Above Grade finished and conditioned space averages 1749-1500 sq.ft per unit
- 5. **(5)** Above Grade finished and conditioned space averages <1500 sq.ft. per unit
- 6. **(1)** Provide accessory dwelling units (garage apartment, granny flat, etc.)
- 7. **(2)** Building designed for flexibility to allow for changing uses in the future (rough-ins for future bathrooms, finish flooring runs under partitions, reconfigurable spaces, etc.)
- 8. **(2)** Building utilizes incremental design techniques with documented provisions to expand to meet future growing needs (roof trusses designed for additions, room layouts configured for additions, etc.)
- 9. **(1)** Project is a co-housing development.
- 10. **(2)** Average density greater than 40 dwelling units per acre (du/ac).
- 11. **(1-5)** Utilize an approach not listed that meets the goals of this section.

List approach _____

SECTION I Subtotal _____



BASIC REQUIREMENTS

SECTION A Subtotal _____
 SECTION B Subtotal _____
 SECTION C Subtotal _____
 SECTION D Subtotal _____
 SECTION E Subtotal _____
 SECTION F Subtotal _____
 SECTION G Subtotal _____
 SECTION H Subtotal _____
 SECTION I Subtotal _____

TOTAL _____

I certify that the preceding information is complete and accurate and that all requirements for Green Built Home certification will be met or exceeded.

X _____

Builder / Developer Signature _____

Date _____



Green Built Home was founded in 1999 by Wisconsin Environmental Initiative. Green Built Home is a program of WEI and is implemented in cooperation with leading utilities and organizations that promote green building.

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