

# Application for Neighborhood and Community Development Funds

Applications should be submitted electronically to [cdbg@cityofmadison.com](mailto:cdbg@cityofmadison.com) by 12:00 p.m. on the first Friday of the month and will be reviewed by the CDBG Committee on the first Thursday of the following month.

Program Title:	Participatory process and Feasibility Report for CoHousing at Union Corners	Amount Requested:	\$20,000
Agency:	Design Coalition Institute Inc. (DC Institute)	Tax ID/EIN/FEIN: 56-2623863	
Address:	2088 Atwood Ave	DUNS #: 967630935	
Contact Person:	Susan Thering	Telephone:	608.263.8469
Email:	Susan@DesignCoalition.org	Fax:	

1. Program Abstract: Provide an overview of the project. Identify the community need to be addressed. Summarize the program's major purpose in terms of need to be addressed, the goals, procedures to be utilized, and the expected outcomes. Limit response to 150 words.

NEED: "CoHousing" is an approach to development where the future owner-occupant/neighbors work together to create a community with relatively small independently owned units and relatively extensive common facilities. There are multiple long-term social and economic benefits; however, the costs of pre-development technical assistance may be prohibitive. Funds are needed to offset these costs so low and moderate income households can participate.

## GOALS & PROCEDURE

The applicant will conduct a public information and recruitment initiative to secure participation of a diversity of households and engage all essential parties in a participatory process that will produce a "Feasibility Report" by April 2015. This "deliverable" will include one or more conceptual layouts for the site, with unit counts, unit size and mix, and overall building massing.

## OUTCOMES:

Long-term (3 – 6 years): Up to 80 units of "green" owner-occupied housing, with 30% owned/occupied by low and moderate income households.

2. Target Population: Identify the projected target population for this program in terms of age, residency, race, income eligibility criteria, and other unique characteristics or sub-groups.

We anticipate two or three complementary clusters of cohousing at Union Corners, 25 to 35 units each. One cluster will likely be for people 50 years and older. We are working with local activists and the neighborhood association to assure the entire site, including the cohousing, is "Intentionally Welcoming" (see below) to all identity groups. To date, the majority of potential occupant/owners are low to moderate income individuals from the LGBT community born before 1960. We anticipate 30% of all the owner/occupants will qualify for some financial assistance from the city and/or other sources.

### **# unduplicated individuals estimated to be served by this project:**

Between 136 and 153 (average 1.7 persons per household).

### **# unduplicated households estimated to be served by this project:**

Between 70 and 80 Households

3. Program Objectives: The 5-Year Plan lists 9 project objectives (A through N). Circle the one most applicable to your proposal and describe how this project addresses that objective.

A. Housing – Existing Owner-Occupied

**B. Housing – For Buyers**

C. Housing – Rental Housing

E. Economic Dev. – Business Creating Jobs

F. Economic Dev. – Micro-enterprise

G. Neighborhood Civic Places

K. Community-based Facilities

L. Neighborhood Revitalization

N. Access to Housing Resources

4. Fund Objectives: Check the fund program objective which this project meets. (Check all for which you seek funding.)

Acquisition/ Rehab	<input type="checkbox"/> New Construction, Acquisition, Expansion of Existing Building	Futures	<input checked="" type="checkbox"/> Prototype
	<input type="checkbox"/> Accessibility		<input checked="" type="checkbox"/> Feasibility Study
	<input type="checkbox"/> Maintenance/Rehab		<input type="checkbox"/> Revitalization Opportunity
	<input type="checkbox"/> Other		<input checked="" type="checkbox"/> New Method or Approach
Housing	<input type="checkbox"/> Rental Housing	Homeless	<input type="checkbox"/> Housing
	<input type="checkbox"/> Housing For Buyers		<input type="checkbox"/> Services

5. **Budget:** Summarize your project budget by estimated costs, revenue, and fund source.

EXPENDITURES	TOTAL PROJECT COSTS	AMOUNT OF CD REVENUES	AMOUNT OF NON-CD REVENUES	SOURCE OF NON-CD FUNDED PORTION
<b>A. Personnel Costs</b>				
1. Salaries/Wages (attach detail)*	\$ 8,000	\$ 5,000	\$ 3,000	See note
2. Fringe Benefits	\$ 2,800		\$ 2,800	See note
3. Payroll Taxes	\$ 480		\$ 480	See note
<b>B. Non-Personnel Costs</b>				
1. Office Supplies/Postage				
2. Telephone				
3. Rent/Utilities				
4. Professional Fees & Contract Services	\$ 30,000	\$ 15,000	\$ 15,000	See note
5. Work Supplies and Tools				
6. Other:	\$			See note
<b>C. Capital Budget Expenditures</b> (Detail in attachment C)				
1. Capital Cost of Assistance to Individuals (Loans)	000			
2. Other Capital Costs:	000			
<b>D. TOTAL (A+B+C)</b>	<b>\$ 41,280</b>	<b>\$ 20,000</b>	<b>\$ 21,280</b>	<b>See note</b>

\*Salary: Executive Director: 20 hours/month x \$50/hour x 8 months = \$8,000

**NOTE:** Sources of Non-CD funds include workshop fees collected from participants, grants, and in-kind services from applicant and partner organization (Design Coalition Architects). Grants secured to date: Evjue Foundation \$2,500 and New Harvest Foundation \$ 8,077.50.

6. **Action Plan/Timetable**

Estimated Month of Completion  
(If applicable) \_\_\_\_\_

Describe the major actors and activities, sequence, and service location, days and hours which will be used to achieve the outcomes listed in # 1.

Use the following format:  
(Who) will do (what) to (whom and how many) (when) (where) (how often). A flowchart may be helpful.

**Module #1: Building a CoHousing Community (Summer 2014 Workshops)**

100-150 People

**Intended Outcomes:**

A preliminary gauge of interest, including:

- Preliminary count of potential investors/residents
- Identify “Common Goal Groups” (multi-generational; seniors only; artists; other)
- Identify preliminary core group for each “Common Goal Group”

## Tasks

- Prepare workshop curriculum & materials (powerpoints, worksheets)
- Identify, collect, and organize mailing lists
- Identify and secure sites for posts (digital and hardcopy)
- Prepare articles, posters, and fliers (marketing)
- Identify and invite speakers for Module #2 and set dates
- Secure meeting rooms and amenities
- Update websites
- Advertise meetings
- Produce the Workshop (set up day of, Workshop, take down)
- Analyze the results and determine if there are enough potential investors/residents to continue to Phase Two

## Speakers & Topics

Lou Host-Jablonski – Introduction to Cohousing

Rep from Gorman – Site and Developer

Art & Sue Lloyd – Village Cohousing

John Steines – Welcoming Diversity at Union Corners

## **Module #2: Technical Assistance Workshops for New Core Groups (Fall 2014)**

Small Groups, 10-12 people each; 5 Workshops/Topics, 2-3 Hours Each

**Intended Outcomes:** Core Groups with skills & knowledge to engage next steps

### Tasks:

- Organize communications
- Identify and invite speakers
- Secure meeting rooms and amenities
- Plan curriculum and materials

## Topics & Speakers

### Programming – Lou Host-Jablonski

Workshop preparation (curriculum and materials worksheets powerpoint)

Outcomes: Data required to create a working program for site and buildings

Post-Workshop analysis and program writing

Deliverables: Written program for site and buildings

### Site and Design – Lou Host-Jablonski

Workshop preparation (curriculum and materials worksheets powerpoint)

Outcomes: Participants' design literacy

Post-Workshop report preparation

Deliverable: Workshop report

### Finance & Real Estate Concepts – Rep from Gorman w/ Development Consultant (Katie McCamant of CoHousing Partners)

Workshop preparation (curriculum and materials worksheets powerpoint)

Outcomes: Participants personal/household financial readiness self-assessment

Post-Workshop Analysis & Report preparation

Deliverable: Workshop report

### **Legal Organizational Structures and Documents – Tim Radelet w/Legal Consultant**

Workshop preparation (curriculum and materials worksheets powerpoint)

Outcomes: Participants' readiness to create and enter into legal agreements (Forms of group legal formation; Articles of Incorporation; Bylaws; Covenants, Conditions, & Restrictions, etc.)

Deliverable: Workshop: Binder of sample documents

### **Group Decision-Making Processes – Sue Thering**

Workshop preparation (curriculum and materials worksheets powerpoint)

Outcomes: Participants' readiness for participatory decision making.

Post-Workshop Analysis & Report preparation

Deliverable: Workshop report

### **Module #3: Core Group – Site design and Unit Design**

One Core Group, approximately 6 months

#### **Tasks**

Code and Land Analysis - Zoning and building requirements; land survey coordination

Meetings - developer; City officials; legal team; building contractor(s); internal design team

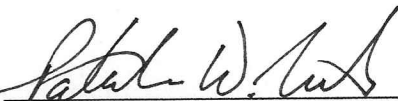
Concept Project Layout - Several alternative concepts, based on Programming, (per above)

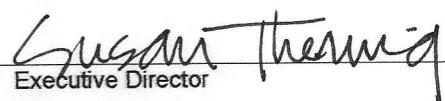
Communications - Ongoing, with the above; feasibility report presentations to neighborhood and City agencies

**FINAL DELIVERABLE:** Feasibility report with one or more conceptual site layouts with unit counts, unit size and mix, and overall building massing.

7. What was the response of the alderperson of the district to the project?  
The Union Corners site is adjacent to two aldermanic districts. Both Alder Rummel and Alder Palm responded positively to applicant's email requesting support this project and proposal.
8. Does agency seek funds for property acquisition and/or rehab? [If applicable, describe the amount of funds committed or proposed to be used to meet the 25% match requirements (HOME or ESG) with its qualifications.]
- No Complete Attachment A
- Yes Complete Attachment B and C and one of the following:
- |                            |                             |
|----------------------------|-----------------------------|
| <input type="checkbox"/> D | Facilities                  |
| <input type="checkbox"/> E | Housing for Buyers          |
| <input type="checkbox"/> F | Rental Housing and Proforma |
9. Do you qualify as a Community Housing Development Organization (CHDO)? (See attachment G for qualifications.)
- No  Yes - Complete Attachment G
10. Do you seek Scattered Site Acquisition Funds for acquisition of service-enriched housing?
- No  Yes - Complete Attachment B, C, F, and H
11. Do you seek ESG funds for services to homeless persons?
- No  Yes - Complete Attachment I
12. This proposal is hereby submitted with the approval of the Board of Directors/Department Head and with the knowledge of the agency executive director, and includes the following:
- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Future Fund (Attachment A)     | <input type="checkbox"/> Housing for Resale (Attachment E)            |
| <input type="checkbox"/> Property Description (Attachment B)       | <input type="checkbox"/> Rental Housing and Proforma (Attachment F)   |
| <input type="checkbox"/> Capital Budget (Attachment C)             | <input type="checkbox"/> CHDO (Attachment G)                          |
| <input type="checkbox"/> Community Service Facility (Attachment D) | <input type="checkbox"/> Scattered Site Funds Addendum (Attachment H) |
|  | <input type="checkbox"/> ESG Funding Addendum (Attachment I)          |
13. Affirmative Action: If funded, applicant hereby agrees to comply with City of Madison Ordinance 39.02(9) 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/aaForms.cfm>.
14. Non-Discrimination Based on Disability: Applicant shall comply with Section 39.05, Madison General Ordinances, Nondiscrimination Based on Disability in City-Assisted Programs and Activities. Under section 39.05(7) of the Madison General Ordinances, no City financial assistance shall be granted unless an Assurance of Compliance with Sec. 39.05 is provided by the applicant or recipient, prior to the granting of the City financial assistance. Applicant hereby makes the following assurances: Applicant assures and certifies that it will comply with section 39.05 of the Madison General Ordinances, entitled "Nondiscrimination Based on Disability in City Facilities and City-Assisted Programs and Activities," and agrees to ensure that any subcontractor who performs any part of this agreement complies with sec. 39.05, where applicable, including all actions prohibited under section 39.05(4),. MGO." <http://www.cityofmadison.com/dcr/aaForms.cfm>

15. 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.

Signature:  Date: June 6, 2014  
President-Board of Directors/Department Head

Signature:  Date: 6 JUNE 2014  
Executive Director

For additional information or assistance in completing this application, please contact the Community Development Division at 266-6520.

### FUTURE FUND PROPOSAL ONLY

- A. Describe the project features which make this a prototype project, feasibility study, addresses a short-lived revitalization opportunity or develops a new method or approach, which triggered the need for Future Funds.

**Short-Lived Opportunity & Feasibility Study:** Design Coalition Institute and our partners at Design Coalition Inc. have participated in the Union Corners redevelopment with four Neighborhood Associations, local activists, and two district Alders over the past several years. Since Gorman & Co. (Gorman) won the Request For Proposals, we have met with their representatives several times about the possibility of CoHousing.

Gorman's General Development Plan was approved by the Plan Commission earlier this month (May 2014). That plan indicates low-rise housing on the section of the property South of Winnebago Street. We are currently working to secure an option on that section for this cohousing project. There is a short-lived opportunity to recruit and organize future owner/occupants, prepare the feasibility report described above, and secure financing before that option expires. (NOTE: We are working with a group of potential owner/occupants to identify alternative sites in case the opportunity at Union Corners falls through, so any funds generated through the city or other sources will be used for the same goals and outcomes on another site).

**New Method or Approach #1: CoHousing, with an "Enlightened Developer":** The CoHousing model itself is an alternative approach to housing development. However, it is not new in Madison; there are three cohousing-type developments. Our partner organization, Design Coalition Inc., has been involved with the planning and design of all three. However, this is the first time there is a site and a developer willing to consider a cohousing partnership *before* a group of potential owner/occupants is organized and down payments are secured. We anticipate the time and costs of pre-development planning will be significantly less under this new approach, thus allowing more low to moderate income households to buy in. We anticipate this will be a model that will make cohousing more affordable in the future.

**New Method or Approach #2: "Intentionally Welcoming":** Union Corners is in the Schenk-Atwood-Starkweather-Yahara (SASY) Neighborhood. The SASY Neighborhood Association has adopted a charter embracing the idea of an "Intentionally Welcoming" community. This vision is being adopted for Union Corners in general and for the CoHousing at Union Corners in particular.

The SASY Neighborhood Association defines "Intentionally Welcoming" as:

*"Intentional" implies a thought out and considered action. "Welcoming" is a friendly greeting or reception that comes from the heart.* (Excerpt from "SASY Neighborhood Association Draft Charter": [www.sasyna.org/index.php/download\\_file/view/553/76/](http://www.sasyna.org/index.php/download_file/view/553/76/))

The workshop process detailed above is designed to convey this vision and recruit a diversity of households. To date, individuals from the LGBT community born before 1960 are the majority of households participating in the pre-development planning process (see their Facebook page at <https://www.facebook.com/LGBTFriendlyCoHousing?ref=hl>).



Design Coalition Institute and our partners at Design Coalition Inc. were glad to respond to initial requests for assistance from the SASY Neighborhood Association and local activists from the LGBT community to help this group get started, and we are looking forward to working with this group and other under-served groups as this “Intentionally Welcoming” cohousing project unfolds.

### **New Method or Approach #3: Multi-Generational Housing:**

There are two approaches to “multi-generational housing” being explored in this cohousing project:

1. Housing for three generation and grandparent/grandchild households, which are increasingly common in low to moderate income households. A recent report from the Pew Research documents this trend:

*“Since bottoming out around 1980, however, the multi-generational family household has mounted a comeback. The reversal has taken place among all major demographic groups, and it, too, appears to be the result of a mix of social and economic forces..... Of the 49 million Americans living in a multi-generational family household, 47% live in a household made up of two adult generations of the same family (with the youngest adult at least 25 years of age); another 47% live in a household with three or more generations of family members; and 6% are in a “skipped” generation household made up of a grandparent and grandchild, but no parent.”*

(<http://www.pewsocialtrends.org/2010/03/18/the-return-of-the-multi-generational-family-household/> )

2. Housing for seniors where the younger members assist the older members through end-of-life, then, as the younger members age, younger households buy in and the cycle continues, which is a model being adopted in the LGBT community.

A recent article on the AARP website sums up the housing issues faced by many members of the LGBT community in that age group:

“Many LGBT elders don’t have a strong support system. Most don’t have children. That means that when they become older and need help, they may not have family caregivers to step up, not to mention the financial wherewithal. Often they feel isolated and alone, reluctant to go into setting (independent, assisted living) where they may feel unwelcome. With housing specifically geared to an older LGBT population, residents can be part of a community, helping one another as they age.” [Accessed on 9 Feb 2014 from <http://blog.aarp.org/2014/01/14/affordable-housing-for-lgbt-older-adults-on-the-rise/> ]

**New Method or Approach #4: Multiple CoHousing Clusters on One Large Site:** As noted above, we anticipate two or three clusters of cohousing on the site. We anticipate greenspace between clusters and arrangements for sharing common indoor and outdoor amenities. As far as our research has found, this is a first in the nation, and, as the site is part of a larger mix-use urban infill development, we anticipate this will receive national attention as an outstanding “green cities” initiative.