

## Affordable Housing Fund (AHF-TC) Application

This application form should be used for projects seeking City of Madison AHF-TC funds. Please format for logical page breaks. Applications must be submitted electronically to the City of Madison Community Development Division by **noon on August 15, 2023**. Email to: [cddapplications@cityofmadison.com](mailto:cddapplications@cityofmadison.com)

### APPLICANT INFORMATION

Proposal Title:	Neighborhood House Apartments		
Amount of Funds Requested:	\$1,985,000	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Name of Applicant:	Neighborhood House Community Center, Inc.		
Mailing Address:	29 South Mills Street, Madison, WI 53715		
Telephone:	608-255-5337	Fax:	N/A
Admin Contact:	Laura Gundlach	Email Address:	<a href="mailto:laura@neighborhoodhousemadison.org">laura@neighborhoodhousemadison.org</a>
Project Contact:	Adam Winkler	Email Address:	<a href="mailto:ajw@alexandercompany.com">ajw@alexandercompany.com</a>
Financial Contact:	Jon Beck	Email Address:	<a href="mailto:jdb@alexandercompany.com">jdb@alexandercompany.com</a>
Website:	<a href="http://alexandercompany.com">alexandercompany.com</a> ; <a href="http://neighborhoodhousemadison.org">neighborhoodhousemadison.org</a>		
Legal Status of Maj. Owner:	<input type="checkbox"/> For-profit <input checked="" type="checkbox"/> Non-profit	LIHTC Application:	<input type="checkbox"/> 4% only <input checked="" type="checkbox"/> 4+4% <input type="checkbox"/> 9%
HOME-ARP Set-Aside:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Anticipated WHEDA Set-Aside:	<input checked="" type="checkbox"/> General <input type="checkbox"/> Preservation <input type="checkbox"/> Non-Profit <input type="checkbox"/> Supportive Housing		
Federal EIN:	39-1930073	SAM/ UEI #:	

\* If seeking federal funds

### HOME-ARP SET-ASIDE APPLICANTS

If applying to this RFP under the HOME-ARP set-aside please check the box for "Yes" above. For questions in this application that do not apply, please write "Not Applicable."

### 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 <https://www.cityofmadison.com/civil-rights/contract-compliance/affirmative-action-plan/individual-developers>.

### 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: Samuel Brown

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

Date: August 14, 2023

**PROPOSAL DESCRIPTION**

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

Neighborhood House Community Center – Madison’s first and oldest community center, has been serving the Greenbush Neighborhood for more than 106 years. Founded in the traditions of the late 19th century settlement house movement, Neighborhood House was originally constructed to serve Madison’s rapidly growing Italian, Jewish, and African American communities. Today, Neighborhood House remains committed to providing a diverse range of programs and services to the populations residing in Madison’s south and west sides. However, the current community center building has surpassed its useful life, and is looking to secure its future and better serve its users and community by redevelopment the property to provide increased space for a wider variety of center programming and complimentary uses.

The Neighborhood House Board of Directors and its members envisions a new Neighborhood House worthy of being considered downtown Madison’s community center – a gathering place where traditional community center services share a home with enriching cultural and arts programming as well as other amenities for neighborhood residents.

Available social services include a food pantry, community meals, housing assistance, a computer lab, holiday drives, and a monthly law clinic. Additionally, they provide year-round youth programs, adult enrichment and fitness classes, programs specifically tailored for adults with disabilities, and act as hosts for numerous community groups.

Neighborhood House Community Center sought creative solutions for an updated space to meet their growing needs, and in a competitive, public proposal process they selected local real estate development firm The Alexander Company to bring their vision to fruition. Through this partnership, Neighborhood House and The Alexander Company will create a new mixed-use, mixed-income community on the site of the current center at 29 S. Mills Street.

The community center will be located on the ground floor, with housing above catering to a variety of income levels. The development will offer much-needed housing at affordable rates ranging from 30% of the area median income (AMI) to market rate. The unit mix is 40 1-Bedroom Units, 14 2-Bedroom Units and 6 3-Bedroom Units. Three of the three 3-Bedroom Units have direct 1st Floor exterior ingress/egress.

The Alexander Company typically makes a deliberate effort to mix income groups as a fundamental part of a community’s financial and operating plans and has achieved great success in doing so. With elevated design standards, effective management, preventative maintenance, and an experienced in-house compliance team, the company has created mixed-income communities that serve as shining examples of success while also setting a precedent for the appropriate and responsible methods of multi-family development and management. A mixed-income community offers individuals and families a platform to achieve and sustain upward mobility. With various levels of income served, residents are able to move into the “next phase” of housing without uprooting their lives and incurring the expenses associated with moving. Residents benefit from affordable housing in an urban core – an area and lifestyle that they might not otherwise be able to afford and enjoy. With greater access to transportation and employment opportunities individuals and families thrive.

To cater to the specific needs of individuals with income in the 30% AMI range, the project team has partnered with the Salvation Army Dane County to provide additional services that Neighborhood House currently does not offer. In addition to keeping the project affordable during the 15-year Section 42 tax credit compliance period, the project has selected to make the project for 40-years.

The redesigned community center will accommodate existing programs and social services, and also feature an upgraded food pantry, recreation areas, classrooms, art rooms, a commercial kitchen for community meals, and a new computer lab for academic support and job skills training. It will also include outdoor spaces for youth summer camps and community events. Furthermore, the center will offer inviting reception areas, event and meeting rooms to accommodate a diverse array of cultural, art, dance, and immigrant groups that have called Neighborhood House their home for over a century.

Preserving its rich history while meeting the evolving needs of the community remains paramount for Neighborhood House. As one of the few remaining institutions from Madison’s lost Greenbush Neighborhood, Neighborhood House aims to showcase the neighborhood’s past and celebrate the important role that Neighborhood House has played in the lives of Madison’s Italian, Jewish, and African American residents through exhibits and design features.

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

Type of Project:  New Construction  Acquisition/Rehab or Preservation  
 Type of Project:  Multi-family  Senior (55+ or 62+ yr. old): \_\_\_\_\_

Total number of units: 60

Total number affordable of units (<60% CMI): 36

Total % affordable of units (<60% CMI): 71%

Total amount of AHF requested per affordable unit: \$38,922

Number of units supported by Section 8 project-based vouchers, if known: 0

PBV CMI level: N/A

Length of Period of Affordability Commitment (min. 40 years): 40 years

## 3. Please indicate the organization of the development team for the proposed development:

Non-Profit Developer  For-Profit Developer  
 Non-Profit Controlling Member  For-Profit Controlling Member

## 4. Please indicate the loan terms requested for this proposal as described in Section 1.4 of the RFP. Is the applicant requesting a waiver of shared appreciation in exchange for permanent affordability?

The development team will commit to making annual payments on the portion of the funds attributed to the AHF Cash Flow Note after the payment of the deferred developer fee. In order to make the project feasible, Neighborhood House is contributing its land to the project at no cost. Since a large portion of the deferred development fee will be paid to Neighborhood House Community Center, it is important that the cash flow be put to the payment of those fees to make the project viable. Payments to the City on the cash flow promissory note will be made should any cash flow become available during the 16 year loan term after the developer fee has been repaid.

**AFFORDABLE HOUSING INITIATIVE FUND GOALS & OBJECTIVES**

## 5. Please check which of the following goals outlined in the Request for Proposals are met with this proposal:

1. Increase the supply of safe, quality, affordable rental housing, especially units affordable to households with incomes at or below 30% of area median income, that ensure long-term affordability and sustainability.
2. Preserve existing income- and rent-restricted rental housing to ensure long-term affordability and sustainability.
3. Improve the existing rental housing stock through acquisition/rehab to create long-term affordability and sustainability.

**AFFORDABLE HOUSING NEEDS**

6. Describe Development Team's knowledge of and experience in identifying and addressing affordable housing needs of the City of Madison.

Many believe the nation has reached a housing crisis and Dane County is no exception. While many high-end, market-rate apartments have been constructed in the Madison area, little has been created catering to those with low to moderate incomes. With respect to the proposed project, the Greenbush Neighborhood Plan specifically addresses the Neighborhood House Community Center ("NHCC") and its importance to the neighborhood as well as calls for improving the physical and financial resources of NHCC, in addition to the dire need for additional affordable housing.

Nearly every Alexander Company project has entailed an affordable housing component, and the company has been working with the Low Income Housing Tax Credit ("LIHTC") Program since its inception in 1986. One of the thrusts of The Alexander Company has always been providing quality, affordable housing in downtown cores, and areas most in need, offering housing to those who would not otherwise be able to afford a desirable downtown location. This is done not only for sustenance, but because it aligns with company values.

The Alexander Company has developed numerous housing projects in the Madison market with an emphasis on affordable housing, demonstrating a history of success for nearly 40 years. Since 1984 The Alexander company has created over 3,000 units of housing in Wisconsin, and over half of those units were designated as affordable rental housing, whether through the LIHTC program or a comparable resource. In the past two years, The Alexander Company has delivered nearly 300 units of affordable housing to the Madison area.

This housing provides critical shelter and the dignity and stability that accompany a quality home at an affordable rate. The Alexander Company has seen first-hand how housing can be the foundation for life improvement through their creation and management of affordable housing, including housing for homeless and at-risk veterans in addition to a partnership with the Salvation Army of Dane County for professional property management services for local housing communities serving those struggling with homelessness.

Further, The Alexander Company typically makes a deliberate effort to mix income groups as a fundamental part of a community's financial and operating plans and has achieved great success in doing so, particularly in Madison. With elevated design standards, effective management, preventative maintenance, and an experienced in-house compliance team, the company has created mixed-income communities that serve as shining examples of success while also setting a precedent for the appropriate and responsible methods of multi-family development and management.

A mixed-income community, such as that being proposed, offers individuals and families a platform to achieve and sustain upward mobility. With various levels of incomes served, residents are able to move into the "next phase" of housing without uprooting their lives and incurring the expenses associated with moving. Residents benefit from affordable housing in an urban core – an area and lifestyle that they might not otherwise be able to afford and enjoy. With greater access to transportation and employment opportunities, individuals and families thrive.

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

As you're likely aware, the City of Madison has recently released a draft version of the 2023 Housing Snapshot Report. The report stated that even with thousands of new units in the pipeline, the City's vacancy rate is still well below healthy levels that could help alleviate rapid rental cost appreciation. From 2010 to 2019, the rental gap between units available and those in need has grown for 30% AMI units (1,150 unit gap), 50%-80% AMI units (2,505 unit gap), and >80% AMI units (3,725 unit gap). In Madison, nearly half (48%) of renter households are cost burdened to some degree, with nearly a quarter of renters spending more than half of their income on rental costs every month. Given this information, it is clear that the City of Madison is in an affordable housing crisis and the demand for the proposed development is high.

While dated, the Greenbush Neighborhood Plan amended in 2010 expresses a need for additional affordable housing. The Greenbush Neighborhood vision statement shares its desire to continue its rich tradition of being a diverse, stable neighborhood, including affordable housing. A further need is expressed for housing to target families earning 50% to 80% of Dane County median income levels – and this was stated nearly 13 years ago. Specifically mentioned under Greenbush Neighborhood Housing, Property Maintenance, and Code Enforcement goals: increase affordable housing, provide a variety of housing choices, provide housing opportunities for a diverse population, and provide high-quality housing choices. The anticipated demand on the neighborhood-level is also high.

## 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 target service population(s) proposed (e.g., households currently experiencing homelessness listed on the Community-wide Prioritized List, veterans, persons with disabilities, formerly incarcerated individuals, other, etc.). Describe the consultation and coordination between Developer, the Property Manager and the lead Supportive Service Coordination Agency that occurred prior to this application and planned to design the development in terms of matching unit mix (income and size) to the targeted population.

The Neighborhood House Apartments will include 12 (20%) Integrated Supportive Housing units at the 30% AMI income and rent level. The target service population proposed are households experiencing homelessness with all twelve targeted to individuals/families on the community-wide prioritization list.

The project team includes The Salvation Army of Dane County as the service provider. The Alexander Company and The Salvation Army are currently working together on the Salvation Army's Shield Apartments project, with the Salvation Army as the service provider and the Alexander Company as the property manager. The Alexander Company's extensive knowledge in affordable dwelling helped to create a unit mix that the team thought would be set to serve the targeted population and would be able to maintain a high occupancy level. The plans originally had three, 3-bedroom units. The property management team worked with the development and architectural staff to increase that number to six, with the thought that there will be more demand for three bedroom units for families. The property management staff, development team and architectural team met with the service provider to go through the unit mix and to make sure the service provider could handle the case load of 12 Integrated Supportive Housing units.

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.

The Salvation Army of Dane County will serve as the lead agency for resident referrals and for implementing and operating the supportive services plan. Our agency will continue its role and coordination with the Homeless Services Consortium, providing supportive services for individuals and/or families experiencing or at risk of homelessness.

#### Services

Residents will have access to a variety of social services from The Salvation Army and partner providers. These include 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
- medical services
- mental health services
- 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

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 (e.g., assessment and referral, on-site intensive case management, etc.) and level of supportive services (% FTE and ratio of staff: household) that will be provided to residents of the proposed project.

As mentioned earlier, The Salvation Army of Dane County will be the service provider. The Salvation partners very closely with the other service providers for households experiencing homelessness in our community, such as The Road Home, The YWCA, Porchlight and Coordinated Entry. DAWNS is not a direct duplication of service but actually a compliment. All of the housing programs available for families vary slightly as to amount of financial assistance, length of time, type of service. In the past if a participant is unable to access one program or has not been successful in one they can participate in another. Or if the needs of a family would best fit in one of the housing programs, for example DAWNS, as determined by coordinated entry, then the family would be able to enroll in the program. The goal of the DAWNS program is to assist the families to obtain and maintain permanent housing. The program is able to assist in obtaining the housing due to the partnerships with landlords and the financial assistance. The other part is for the families to be able to maintain the housing. The case manager assists the participant to enroll in many of the community mainstream benefits such as Childcare, FSET, Food Share, W2, Employment and Training programs, Section 8 and Social Security if eligible. The Salvation Army of Dane County currently has a total of 8 supportive staff members. The staff are non-exclusive to any property that they provide support services to.

11. CDD expects that supportive service partners have access to adequate compensation for the dedicated services provided to residents of the development. In order to ensure the success of the development, the partnership(s), and the tenants, describe the level of financial support to help pay for or subsidize supportive services that the development will provide annually to the identified supportive service partner(s). Identify any other non-City funding sources contemplated or committed for supportive services outside of this project. Explain any arrangement with developer fee sharing, "above the line" payments in the operating budget, "below the line" payments out of available



cash flow and/or percent of developer fee shared. CDD is open to deferral of AHF Cash Flow Note payments to ensure meaningful financial support to supportive service partners.

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 will provide services at no cost to the project. A majority of the Salvation Army's supportive services are funded through Dane County, the United Way, and other government donations and fundraising. The DAWNS program is funded by Dane County and the RISE program is funded through the US Department of Housing and Urban Development.

The site redevelopment project is a collaboration between The Alexander Company and Neighborhood House, working together as co-developers. In the partnership, Neighborhood House will qualify as an Emerging Developer on the WHEDA tax credit application. Both organizations will also be owners in the managing member entity, with Neighborhood House holding a 51% ownership stake and The Alexander Company holding 49%. Neighborhood House will be given a right of first refusal at the end of the 15-year compliance period for the Low-Income Housing Tax Credits to acquire the Project or membership interests of the third-party investor member at a price specified in Code Section 42(i)(7). Additionally, Neighborhood House will have the opportunity to purchase the Alexander Company's interest in managing member for a nominal \$100. In addition to the Ownership Interest, Neighborhood House will receive 24% of the development fee.

The Neighborhood House offers services and programs that will be available the tenants and the general public. Programs include Wellness Classes, Programs for Adults with Disabilities and Youth Programs. Youth Programs include Afterschool/Off Day Programs, Summer Camps, Toddler True Play, Youth Adult Mentoring and Youth Employment; Community Impact Internships.

Services provided by the Neighborhood House include a Laundry Program with Mound Street Laundromat, a Monthly Law Clinic, Take and Bake Community Meals, Warm-up Wednesday (every Wednesday afternoon, hot meals, pastries, snacks and drinks are available for those in need), Meeting Spaces, Resources and Housing Navigation, Sunshine Line (non-emergency/warmline phone service where individuals can call and speak to a friendly voice), Transportation Assistance and a Technology Lab.

The Neighborhood House will rent space within the project at a below-market rate, covering only their proportionate share of CAM (Common Area Maintenance) and taxes for the property.

The below market rent and the fees and cashflow that Neighborhood House will receive as part of the project will help ease the financial burden Neighborhood House has offering their vital community services and programs.

## PROPERTY MANAGEMENT: TENANT SELECTION & AFFIRMATIVE MARKETING

12. Confirm that you have read and agree to the Affirmative Marketing Plan and Tenant Selection Standards found in RFP Attachments B-1 and B-2.

Yes, I confirm.

13. Describe the planned approach, relationship and coordination between the Property Manager and the lead Supportive Service Coordination Agency for lease up and ongoing services. Have these entities previously participated in an in-depth pre-lease up coordination process with these target population(s) in coordination with relevant community partners (e.g., CDA, DCHA, VASH, CE, etc.)? How will these entities work together to ensure a successful development well-integrated with the immediate neighborhood and community?

The planned approach and coordination will consist of bi-weekly or monthly coordination meetings between property management and the supportive service provider throughout lease-up, with regular meetings at an interval to be determined on an ongoing basis. By joining forces, the property manager and supportive services coordination agency can create an apartment community that is not just a place to live, but also a supportive environment that caters to the specific needs and aspirations of residents. This creates an enriching environment of stable, long-term residents, where residents also receive both housing and the services they need to thrive. The Alexander Company has experience in coordinating with supportive services providers for lease up and ongoing services. The keys to success entail maintaining open lines of communication and feedback loops, as well as regularly scheduled touch-points.

14. Describe the affirmative marketing strategy and any other strategies to engage the target populations for this proposal. Specifically outline how this development's marketing will be consistent with the City of Madison's

Affirmative Marketing Plan Requirements (Attachment B-2 of the RFP), especially for Asian and Latinx populations which tend to be under-represented in AHF Completion Reports.

We will make use of common marketing tactics such as third-party apartment listing sites (e.g. apartments.com), social media platforms, direct outreach, signage, and various other digital platforms such as a website, display ads, and search engine marketing. Specific to digital marketing platforms is the ability to target zip codes within the City of Madison that intersect with more distressed census tracts, ensuring apartment availability is made known.

We also recognize that not everyone has internet access, so we complement a digital-first approach with more traditional direct, in-person outreach consisting of dropping off printed brochures. This outreach is targeted to employers, community organizations, and neighborhood centers who serve the populations which tend to be under-represented. We also place print ads in a range of publications, such as Isthmus, Capitol Times, Madison 365, and others. Outreach will also be conducted with City staff to identify points of contact and relevant listservs, such as the Homeless Services Consortium, the City's Neighborhood Resource Teams, Centro Hispano of Dane County, the Nehemiah Center for Urban Leadership Development, United Asian Services of WI, United Migrant Opportunity Services, the Wisconsin Women of Color Network, and the Catholic Multicultural Center.

The marketing efforts for this project will begin early with earned media at groundbreaking, during construction, and at completion. Paid marketing and outreach efforts will begin at least six months prior to occupancy, with applications accepted 120 days prior to occupancy as part of the LIHTC compliance. Ongoing marketing will include social media efforts, outreach with community partners, and traditional marketing methods as needed. Ongoing waitlists are maintained accordingly. In addition, the development, property management and supportive services teams will meet six months prior to projected certificate of occupancy to make sure a solid plan is in place for coordination moving forward to maintain efficiency and effective operations that benefit the target population.

15. How will you affirmatively market to populations that will be identified as least likely to apply? Detail specific partnerships that the development team, Property Manager, and/or other agencies in this proposal have had with community agencies and organizations that provide direct housing search and related assistance to households least likely to apply. Please reference successful past practices, relationships with agencies and/or marketing materials used.

The Alexander Company strongly promotes housing equality and inclusiveness, and often takes great measures to ensure populations that are least likely to apply are aware of upcoming housing opportunities. This involves taking proactive measures to reach out to groups that might otherwise be unaware of, or hesitant about, applying for housing in certain areas or complexes.

It's crucial that we act within the bounds of fair housing laws and not discriminate against any group, and we do so via several strategies: ensure all staff understand Fair Housing Laws; cultivating partnerships with community organizations; targeted advertising; ensuring language accessibility in advertising and throughout the leasing process; using inclusive imagery to reflect a diverse group of people, as the City's affirmative marketing plan best practices suggests; ensuring accessibility within the apartment community; hosting open houses; ensuring our online presence indicates we are an inclusive and equal opportunity community; and collaborating with relocation service providers.

Successful past practices include partnerships with Joining Forces for Families, both the Dane County and City of Madison Housing Authorities, and the Veterans Administration. For this project additional outreach will include the Community Action Coalition, WIHousingsearch.org, the Homeless Services Consortium of Dane County, and Madison Neighborhood Resources Teams. Please see the prior response for question fourteen for additional information and examples of specific marketing measures and materials that will be implemented.

16. What percentage of maximum LIHTC rents are used for 50 & 60% units? Describe the proposed development's policy toward notification of non-renewals and limiting rent increases for lease renewals? How will it be ensured that

prospective long-term tenants be protected from significantly and rapidly rising contract rents increases allowed under the published rent limits, even under the rent limit increase requirements in this RFP and Loan Agreement.

The maximum percent for 50% AMI units is 97% and 95% on the 60% AMI units.

Rent increases will be given in accordance with the operating budget for the property, but shall not exceed 2% per the City of Madison's Affordable Housing Fund rules. Rents shall not exceed the maximum allowable under WHEDA. In accordance with fair housing laws, all like units (e.g. bedroom size, LIHTC program designation) will be budgeted and receive the same rental increase notifications. However, the resident's payment history shall be considered when determining the amount of the rental increase and when negative, a minimal or no increase will be given. The purpose of this apartment building is to provide affordable housing to those who may struggle to qualify and afford elsewhere. In keeping with that purpose, management will work with residents to establish flexible payment schedules that allow the resident to meet their financial obligations and help them improve their credit or rental history. Their success under this structure will not be taken advantage of by placing large rent increases on those who can afford to pay versus those who cannot. If tenants can pay their rent in full and management can pay the bills to operate the property and meet debt requirements, minimal rent increases will be given.

## PUBLIC BENEFIT AND RISK

17. Please describe the public benefit of the proposed housing development and the risks associated with the project.

The public benefits are two fold. First, the development helps address the critical issue of housing affordability, especially that in an area located in proximity to major employers (Meriter, St. Mary's and UW Madison).

The project also has a community center for all in the neighborhood and community to enjoy with many great programs and services for all. Programs offered by the Neighborhood House include Wellness Classes, Programs for Adults with Disabilities and Youth Programs. Youth Programs include Afterschool/Off Day Programs, Summer Camps, Toddler True Play, Youth Adult Mentoring and Youth Employment; Community Impact Internships.

Services provided by the Neighborhood House include a Laundry Program with Mound Street Laundromat, a Monthly Law Clinic, Take and Bake Community Meals, Warm-up Wednesday (every Wednesday afternoon, hot meals, pastries, snacks and drinks are available for those in need), Meeting Spaces, Resources and Housing Navigation, Sunshine Line (non-emergency/warmline phone service where individuals can call and speak to a friendly voice), Transportation Assistance and a Technology Lab.

In addition to both of the above, the project will be replacing the Neighborhood House's current building that has outlived its useful life. Also, the project is currently tax-exempt. The project will put the property back on the tax roll.

There are multiple risks for the project. The first risk the project will face is not receiving a state allocation of low-income housing tax credits. Other risks are more market driven. In today's real estate market, two significant challenges affecting all development projects are the escalation of construction costs and the rise in interest rates. Unfortunately, our project is not immune to these prevailing market conditions. One particular issue specific to our project that contributes to higher construction expenses is the inclusion of a first-floor community center. The design of the Neighborhood House necessitates the use of a precast podium, which adds complexity and cost to the construction process. The podium's height is 6 feet taller than a typical first floor, requiring additional envelope materials and resources. Moreover, the project's design incorporates a mezzanine level within the Neighborhood House space, introducing additional structural demands to the first floor area. Additionally, the gymnasium requires a high bay and long span, both of which are atypical for a first-floor space and further escalate construction costs. Furthermore, the need for multiple entries to accommodate the various program elements of the Neighborhood House adds to the project's expenses. Having first-floor entries for the three-bedroom units is not the most efficient solution, as it hampers the maximization of the Neighborhood House's area and its seamless connection to shared elements like elevators, stairs, and waste disposal facilities.

## SITE INFORMATION

18. Address of Proposed Site: 29 South Mills Street

19. In which of the following areas on the Affordable Housing Targeted Area Map (see Attachment A) is the site proposed located? Please check one plus Limited Eligibility, if applicable.

Note: projects applying under the HOME-ARP set-aside may only be located in Preferred TOD and Eligible Core Transit areas.

- Preferred TOD Area
- Eligible Core Transit Area
- Preservation & Rehab Area (Ineligible for New Construction)
- Limited Eligibility Area

20. Identify the neighborhood in which the site is located: Greenbush Neighborhood

21. Date Site Control Secured: 1960's; Development MOU Signed May 22, 2023

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

The subject site is the current home of Neighborhood House Community Center. In 2022, the Neighborhood House issued a public RFP for the redevelopment of the site. Built in the 1960's, the current building has surpassed its useful life, needing more than just a cosmetic touchup. Mechanicals need replacing, the building itself needs repair and ADA accessibility in the building is very limited.

The Alexander Company, Inc. responded to the RFP and ultimately was chosen to partner up with the Neighborhood House group. The vision not only includes replacing the community center on the first floor, but adding a residential component of much needed affordable housing in the Greenbush area.

The site happens to be in a location that expands affordable housing opportunities where most needed. As mentioned before, the site is located in close proximity to major employers. The site is also located in a Preferred Transit-Oriented Development Area, allowing for easy transportation to employment. The Capitol Square offers a pool of potential renters, with many individuals working in various sectors such as retail, food service, custodial services, and administrative roles. Convenient public transportation options allow people to reach the square with ease. A bus ride to the Capitol takes approximately 10 minutes, with a walk to the W Johnson & N Mills (EB) bus stop and a five-minute bus ride to Main & S Carroll (EB).

The site is located at the corner of Mills Street and Milton Street in the Greenbush Neighborhood. The site is one block south of the Regent Street/Mills Street intersection, which is two blocks west of the Regent Street/Park Street intersection. The site is one block west of the entrance to Meriter's Emergency Room entry.

The Greenbush Neighborhood, which is a vibrant and historic neighborhood known for its diverse population and rich cultural heritage. The following list describes what the neighborhood has to offer:

1. **Social Facilities and Services:** The Greenbush neighborhood offers a range of social facilities and services. The subject property is home to Neighborhood House, an important neighborhood and city resource where residents can participate in recreational activities, attend events, and access social services. Programs and services include in-person food pantry, youth & teen summer camps, after-school programs, mentoring, meeting spaces for community groups & organizations, wellness and enrichment classes for adults, social programming for adults with disabilities, technology lab, transportation assistance, community meals, neighborhood events, and much more.
2. **Recreational Facilities and Services:** Greenbush residents have access to numerous recreational facilities. Vilas Park, located on the neighborhood's eastern edge, offers a variety of year round recreational activities, including a beach, playgrounds, sports fields, winter ice skating with a seasonal warming shelter and skate rental, and a zoo. Wingra Park, situated nearby, features kayaking and paddleboarding, walking trails, and picnic areas.
3. **Educational Facilities and Services:** The Greenbush neighborhood benefits from its proximity to the University of Wisconsin-Madison, a renowned educational institution. Residents have easy access to the university's libraries, museums, art galleries, and cultural events. Additionally, Greenbush is served by local public schools.
4. **Commercial Facilities and Services:** Greenbush features a mix of commercial establishments, providing convenience for its residents. Monroe, Park and Regent Street, all major thoroughfares running the periphery of the neighborhood, are lined with various shops, restaurants, cafes, and boutiques. Residents can find grocery stores, pharmacies, and other essential services within close proximity.
5. **Health Facilities and Services:** The neighborhood has access to health facilities and services. Meriter Hospital, the seventh largest hospital in the state based on bed size in 2021, is one block from the project. In addition, there are various clinics, dental offices, and pharmacies located within or near the neighborhood, ensuring residents have convenient healthcare options.
6. **Municipal Facilities and Services:** Greenbush benefits from the municipal facilities and services provided by the City of Madison. The neighborhood has access to public transportation, including bus routes operated by Madison Metro Transit, making it easy to commute to other parts of the city.

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

The current, occupied community center is located on the site. The entire building will be demolished.

24. 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.

Neighborhood House has always been in one side of the existing building since the 1960s. The other side of the building had United Neighborhood Centers, Dane County Mental Health, Legal Action of Wisconsin, and currently has 4 Lakes Property Mgmt, Focused Interruption Coalition, and CRU. To the best of the Neighborhood House's knowledge, the property was an empty lot prior to the existing building being built.

The Neighborhood House does not have an existing Phase I. One will be ordered for the project in the coming months. To the best of Neighborhood House's knowledge, there are no environmental issues with the property. It is anticipated that there is lead and asbestos in the building and those will be identified and properly disposed of during the demolition of the building.

25. Current zoning of the site: CI- Campus Institutional An interactive version of the Zoning Map can be found linked [here](#).

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

The property is currently zoned Campus Institutional ("CI"). CI zoning does not support envisioned changes and goals of the proposed project, so the property will need to be rezoned. After discussion with the Planning and Zoning staff at the initial meeting on June 5th, the zoning the project team and city staff thought most suitable is Neighborhood Mixed-Use ("NMX"). The maximum height in NMX is 3 stories, but the project can go higher through a conditional use. The project will also need to go before Landmarks for a demolition permit.

It is not anticipated that the project will automatically need to go through Urban Design Review. The site is not within a designated Urban Design District and it is outside of the Downtown Zoning Districts (UMX & DC) that require UDC review. The project isn't pursuing PD zoning or proposing a residential building complex (2 residential buildings on one zoning lot)) which automatically require UDC consideration. However, the project team acknowledges that the project could be referred to the UDC by the Planning Director or Alder for an advisory opinion.

The City of Madison's 2018 Comprehensive Plan's Generalized Future Land Use Map did not have a land use recommendation listed. The city is currently working on the 5-year interim update. The project team submitted a Generalized Future Land Use Map Amendment Application to the City on August 3, 2023 with a recommendation for Neighborhood Mixed-Use (NMX). This was required in order to rezone the property.

27. Describe the proposed project's consistency with the land use recommendations, goals and objectives as may be relevant in adopted [plans](#), including the City of Madison Comprehensive Plan (adopted 2018), Neighborhood Plans, Special Area Plans, the Generalized Future Land Use Map (interactive version linked [here](#)), and any other relevant [plans](#).

The Generalized Future Land Use Map lists the property as special institutional. As described above, a Generalized Future Land Use Map Amendment application was submitted to recommend Neighborhood Mixed-Use (NMX).

The Neighborhood House Community Center is specifically discussed in the Greenbush Neighborhood Plan- Adopted by the City of Madison July 1, 2008 and Amended November 9, 2010. The Plan states "The Neighborhood House Community Center (29 South Mills Street) is an important neighborhood focal point as a community-gathering place, as well as for the variety of programs for seniors and youth." One of the Beautification Recommendations is to enhance the Neighborhood House Community Center as an attractive focal point for the neighborhood with more attractive landscaping and a more welcoming front entrance. The report wants to see building improvements to include additional space for programming, improve the food pantry and upgrades to make it ADA wheelchair accessible. All of these will happen with the new building.

The report also puts an emphasis on additional affordable housing in the neighborhood.

28. 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	Asian Midway Foods	.24 miles
	Trader Joe's	.69 miles
Public Elementary School	Randall Elementary School	.67 miles
	Franklin Elementary School	1.10 miles
Public Middle School	Wright Middle School	1.25 miles

	Hamilton Middle School	2.81 miles
Public High School	West High School	1.13 miles
Job-Training Facility, Community College, or Continuing Education Programs	Cents Services, Inc UW-Madison Continuing Studies Edgewood College	.08 miles .2 miles 1.07 miles
Childcare	UnityPoint Health- Meriter- Children's Center Cultured Kids of Madison	.12 miles .35 miles
Public Library	Madison Public Library- Monroe Street	.57 miles
Neighborhood or Community Center	Neighborhood House	0 feet
Full Service Medical Clinic or Hospital	UnityPoint Health- Meriter Hospital St. Mary's Hospital	.07 miles .49 miles
Pharmacy	Community, a Walgreens Pharmacy UW Health Medical Center Pharmacy	.3 miles .2 miles
Public Park or Hiking/Biking Trail	Edward Klief Park Southwest Commuter Path	.09 miles .2 miles
Banking	Summit Credit Union	.39 miles
Retail	Leopold's Books Bar Caffe	.19 miles
Other (list the amenities):	Henry Vilas Zoo	.53 miles

29. What is the actual walking distance (in miles) 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 the weekday at noon. List the bus route(s), major 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. Please refer to [Metro's Adopted Network Redesign](#) and answer based on the best available information at the time of application.

The project enjoys a highly advantageous location in terms of public transportation, being centrally situated within the City of Madison's Preferred Transit Oriented Development Areas. Multiple bus stops are within close proximity, with the nearest seven-day per week transit stop being, Regent & S Mills (EB) and Regent & N. Mills (WB) on the E and 82 Route, just a walking distance of .08 miles from the project. According to the Metro Transit's schedule effective August 20, Route E will be increasing weekday midday service from every 60 minutes to 30 minutes.

In addition to being very close to the E Route, the B Route is very close in proximity to the project site. The N. Park/Regent Street stop is a .2 mile walk from the site. This stop has weekday midday service at fifteen minute increments and provides service seven days a week.

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

Both Franklin and Randall Elementary Schools are listed as elementary schools for the subject property, and Hamilton Middle School is listed as the middle school. The walking route to Franklin Elementary is left on Milton for .1 miles. Turn right onto S Park St for .3 miles. Turn left on Drake St. for 46 ft. Turn right onto S Park St for .4 miles. Turn left onto W Lakeside St. for .5 miles to destination. Total walk time of approximately 29 minutes.

The walking route for Randall Elementary School is take Milton for .2 miles. Turn right onto Orchard St for 492 feet. Turn left onto Regent for .5 miles to destination. Total walk time of approximately 17 minutes.

The walking route for Hamilton Middle School is take Milton for .2 miles. Turn right onto Orchard St for 492 feet. Turn left onto Regent St for 1.1 miles. Turn slightly left onto Speedway Road for .4 miles. Turn right onto Hillcrest for .9 miles. Turn right onto Merlham Drive for .1 miles. Turn left onto walking trail for .3 miles. Turn left onto Waukesha St for .1 miles to destination. Total walk time of approximately 1 hour and 8 minutes.

31. Describe the anticipated 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 site is walkable to many of the amenities listed in #28 above. In addition to walking and the Madison transit, there are other options of transportation available nearby.

People can take advantage of the fact that Madison is a very bicycle-friendly city. The city holds platinum status with the Wisconsin Bike Federation as a bicycle-friendly city. For those without bicycles, the Madison BCycle service

offers a nearby station at Park and Spring St, just 0.22 miles away. To enhance accessibility, the Madison Public Library Foundation collaborates with Madison BCycle to offer the Community Pass Program, making BCycle more affordable and accessible. Community Passes are available for check-out at all nine Madison Public Library locations for up to a week, while individuals can purchase an annual pass for \$150.00, granting them unlimited 90-minute rides for a full season. Monthly and Single Ride Passes are also offered. The project is conveniently located .2 miles from the Southwest Commuter path, offering safe, convenient travel across the city.

For those who may need a car occasionally, Zipcar offers a convenient option. The Regent/Park Zipcar station is just a 7-minute walk away from the project.

32. Describe the impact this housing development will have on the schools in this area. What percent are the 5-year projected capacities for the area schools (from 2019)? Ideal enrollment is considered 90%. Are the schools projected to be at, above, or below capacity? Approximately how many elementary and middle school children are projected to live at the proposed housing development based on your proposed unit mix and previous housing experience? See 5-year projected capacities in 2019 school capacity information found in this [Report](#) (.pdf pages 30-31).

From the 2019 study, student enrollment in mostly all grades at Randall, Franklin, Wright, Hamilton and West are projected to decline. The five-year utilization for each school are as follows: Randall- 83.8%; Franklin- 83.6%; Wright- 66.1%; Hamilton- 73.4%; West High- 98.7%. All schools except West are well below the 90% ideal enrollment.

Given the current unit mix, the property management staff anticipates 15-20 elementary and middle-school aged children in the development.

## CITY AND COMMUNITY ENGAGEMENT PROCESSES

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

On June 5<sup>th</sup>, the project team met with Kevin Firchow and Chris Wells of the Planning Department and Jacob Moskowitz of the Zoning Department via Zoom. This was an initial meeting to discuss the project with staff. At this meeting, zoning was a majority of the focus. The existing zoning regulations are not compatible with the proposed project. Rezoning and timing was discussed. Selection of the rear-yard was also discussed in conjunction with setbacks.

In addition to zoning, it was also discussed that in order to rezone the property, the rezoning needs to be compatible with the Future Generalized Land Use Map in the Comprehensive Plan. The Comprehensive Plan listed the property as Special Institutional and did not make a specific future land use recommendation. Since the city is undergoing the 5-year Interim Update, the project team has proposed a GFLU Map amendment through the City's application process.

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

The team plans to meet with the City Development Assistance Team at their Thursday, September 7<sup>th</sup> meeting.

35. Describe the response of the alderperson in which the proposal is located, as well as the adjacent alderperson(s), if within 200 feet of an adjacent Aldermanic District. What issues or concerns with the project did they identify, if any? How will those be addressed? Please note new [Aldermanic Districts](#) went into effect January 1, 2022.

The project team met with Alder Evers on July 5<sup>th</sup>. At that meeting, Alder Evers didn't voice any concerns, and overall is very supportive of the project. He encouraged us to get in front of the Greenbush Neighborhood Council as soon as possible, which we did July 10<sup>th</sup>. For the 2023 Dane County Affordable Housing Development Fund application, Alder Evers wrote a letter of support touting the Neighborhood House Community Center's significance to the community and listing the importance of access to safe, affordable housing to the community.



36. Describe the neighborhood and community input process to date, including notification to and input from the nearby Neighborhood Association(s). What issues or concerns with the project has been identified, if any? How will those be addressed? Describe the plan for continued neighborhood input on the development (e.g. steering committee, survey, informational meetings, project website, etc.).

To date, the project team met with the Greenbush Neighborhood Council. At that meeting, the group was very supportive of the project. For the 2023 Dane County Affordable Housing Development Fund application, Aris Blevins wrote a letter of support on behalf of the Greenbush Neighborhood Association, noting the Council was very impressed by what they heard at the Council meeting. The project team is working with Alder Evers and Greenbush Neighborhood Council representative Aris Blevins to schedule a full neighborhood meeting. The meeting will occur at their monthly meeting on September 11<sup>th</sup>.

After the first neighborhood meeting, we will work with Alder Evers and Aris to develop a plan to keep in contact with the neighborhood residents, including if they would like to form a steering committee or set a regular schedule for updates to the Council or the whole Association.

37. Describe your plans for neighborhood informational meetings and other ways of engaging and informing residents both during construction and approaching lease-up. Describe your experience in working with neighborhood residents post-approval and detail effective strategies you have used since the beginning of the pandemic to effectively communicate with residents.

As the project progresses past the construction start, the project team will work closely with Alder Evers and Aris to develop a plan to keep the neighbors engaged and informed. In the past, we've had our contractors join Neighborhood meetings to discuss such topics as schedule, noise, dust and any other items that construction can have a negative impact on the surrounding area, and inform them as to what they do to mitigate those negative impacts. As we approach lease-up, we like to reach out to the neighbors to give them information on timing of residents moving in. We encourage them to reach out to anyone they know that is looking for a place to live. Word of mouth has been an effective marketing strategy in the past. Post-covid, a lot of this was done through emails and virtual meetings, but a lot of this communication is back to in-person.

38. Describe how this development will promote both racial and social equity in the community and the greater Madison area. How does this proposal embrace the City's [Racial Equity and Social Justice Initiative](#)? What steps will be taken to ensure goals of this initiative are met on an ongoing basis?

Advancing equity in multi-family requires intentional engagement and community input, which leads to place-making with equitable development principles at its core. Several of these principles are physical in nature, such as constructing unit sizes that match the sizes of low-income renter households. The trend in new market-rate multi-family developments has grown towards smaller unit sizes; however, studies show that low-income renter households may have disproportionately larger household sizes due to multi-generational living. Other principles are administrative in nature with respect to resident screening and establishing a high bar for marketing requirements to ensure low-income renters have access.

The Greenbush neighborhood is a community with a rich and diverse history and culture. Our community engagement process will be conducted hand-in-hand with NHCC, and will be designed to create a safe and energized context and place for the neighborhood residents and stakeholders to fully express and share their authentic selves – their needs, their challenges, and their dreams for the community. This will lay the groundwork for a community that contributes significantly to the overall wellbeing of the neighborhood by advancing equity and social justice through the provision of robust and adaptable housing and urban infrastructure with an approach rooted in the City of Madison's Racial Equity and Social Justice Initiative ("RESJI") mission.

In terms of taking steps to ensure goals of RESJI are met on an ongoing basis, the entire concept of this project is directly in line with the vision of RESJI as described on the City of Madison's website here. The proposed project will provide safe and affordable housing; NHCC offers, or will be offering in their new expanded space, a food pantry and high-quality education; efficient public transportation can be found at multiple points immediately surrounding the project; all people will have opportunities for fair and just inclusion throughout the neighborhood engagement processes; and prospective residents of the new housing community will not be limited by race, ethnicity, gender, sexual orientation, disability, age, place of birth, place of residence, or other group status.

39. Have you or will your development team be willing to provide a meaningful internship, employment opportunity, or development partnership role, to a student or graduate of the Associates in Commercial Real Estate (ACRE) program on this or another project? If so, describe how your development team will address this priority?

Yes, the Alexander Company is willing to provide an internship to a student or graduate of the ACRE Program. The Alexander Company is willing to work with the program to identify a student that would want an intern position at the Alexander Company. Typically, internships are done in the summer. Interns work on multiple projects, so there may be an opportunity for them to be involved with this project next summer.

Joseph Alexander just wrote a reference letter for a past Alexander Company intern and UW Grad that is currently applying to the ACRE Program.

## SITE AMENITIES

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

The project has a roof terrace on the building's third floor. Given the need to maximize the Neighborhood House's space on the first floor and include three-bedroom, walk-up access, there is not a lot of greenspace at grade. We would like to include some sort of tot lot or play structure, but that might not be feasible given the space available and utilities.

The Greenbush Neighborhood has excellent parks that tenants will have access to, one of which is only .09 miles from the site.

41. Describe the interior common area amenities that will be available to tenants and/or guests (e.g., community rooms, exercise room, business center, etc.). For family developments, will there be a year-round indoor play space &/or youth lounge for children and teens?

The project program includes a community room off of the roof top deck and exercise room. The residents will have access to the community center's amenities, which will include an indoor basketball court.

42. What is the anticipated number of total number parking spots, both underground and surface, that will be provided to tenants of the development? What is the ratio to units? What is the associated monthly cost? Will the parking cost in this development vary by CMI level?

The anticipated number of parking spaces are 40 underground and no surface stalls. It is also anticipated that approximately 20 will be available to residents and 20 for the community center. That would be a ratio of .33 stalls per residential unit. The project team will try to maximize stall use with the possibility of off hour parking for the other use. There will be no charge to either the residents or the community center for the use of the stalls and will be on a first-come, first-served basis for the residents.

43. For proposals contemplating first floor commercial space, describe how the use and/or tenant of the space will be a benefit to the immediate neighborhood (e.g. childcare, senior center, community facility, neighborhood-serving commercial etc.). Explain how the use of the space was identified to fill a service gap or enhance the surrounding community. Describe if a prospective tenant or use has already been identified or how a prospective tenant will be found and will help inform the space's design.

As previously mentioned, the Neighborhood House will occupy the first floor retail space. Once complete, they will continue to provide critical services and programs mentioned earlier to the neighborhood and community at large.

The Neighborhood House has engaged Midwest Design & Development, LLC to design their buildout. Thoughtful consideration is being taken into account on how to layout the space so that the various services and programs are designed for the maximum efficiency of the space.

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

The building will be smoke free. Internet will be free to the residents.

**PROPOSAL TIMELINE**

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

<b>Activity/Benchmark</b>	<b>Estimated Month/Year of Completion</b>
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [ <i>Target/Actual Month/Date</i> ]	August 2023
1 <sup>st</sup> Development Assistance Team/ Meeting (Due by 9/14/23) [ <i>Target/Actual Month/Date</i> ]	September 7, 2023
1 <sup>st</sup> Neighborhood Meeting (Due by 9/14/23) [ <i>Target Month/Date</i> ]	September 11, 2023
Submission of Land Use Application (Zoning Map Amendments Due by 10/16/23)	October 16, 2023
Submission of Land Use Application (Permissively Zoned Due by 11/27/23)	N/A
Plan Commission Consideration (If Rezoning, 11/27/23 Meeting for 12/5/23 Common Council)	December 11, 2023
Urban Design Commission Consideration, if applicable [ <i>Target Month/Date</i> ]	Not anticipated to be applicable
Application to WHEDA	January 2024
Complete Equity & Debt Financing	August/September 2024
Acquisition/Real Estate Closing	August/September 2024
Rehab or New Construction Bid Publishing	June 2024
New Construction/Rehab Start	September 2024
Begin Lease-Up/Marketing	June 2025
New Construction/Rehab Completion	December 2025
Certificates(s) of Occupancy Obtained	December 2025
Complete Lease-Up	March 2026
Request Final AHF Draw	April 2026

**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.

<b>ADDRESS #1:</b>		29 S. Mills Street									
% of County Median Income (CMI)	Total # of units	# of Bedrooms					Projected Monthly Unit Rents, Including Utilities				
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
≤30%	12	0	7	4	1	0		686	821	952	
40%	0	0	0	0	0	0					
50%	24	0	17	5	2	0		1106	1336	1547	
60%	15	0	10	3	2	0		1306	1561	1817	
<b>Affordable Sub-total</b>	<b>51</b>	<b>0</b>	<b>34</b>	<b>12</b>	<b>5</b>	<b>0</b>					
80%	0	0	0	0	0	0		1650	1975	2500	
<b>Market*</b>	<b>9</b>	<b>0</b>	<b>6</b>	<b>2</b>	<b>1</b>	<b>0</b>					
<b>Total Units</b>	<b>60</b>	<b>0</b>	<b>40</b>	<b>14</b>	<b>6</b>	<b>0</b>	Notes/Utility Allowance Assumptions: Utility Allowances are: \$106/1BRs, \$126/2BRs, \$147/3BRs				

\*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; 80% = 61-80% CMI; Market = >81% CMI.

<b>ADDRESS #2:</b>											
% of County Median Income (CMI)	Total # of units	# of Bedrooms					Projected Monthly Unit Rents, Including Utilities				
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
≤30%	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					
<b>Affordable Sub-total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>					
80%	0	0	0	0	0	0					
<b>Market*</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>					
<b>Total Units</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	Notes/Utility Allowance Assumptions:				

\*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; 80% = 61-80% CMI; Market = >81% CMI.

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

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

Washer/Dryer  Other: \_\_\_\_\_

48. Please list the source of calculating your utility allowance, and the total utility allowance per bedroom size:  
 Utilities Allowance Used:  CDA  DCHA  HUSM (HUD HOME)

Unit Size (Number of Bedrooms)	Total Monthly Utility Allowance (\$)
Efficiency	n/a
1-Bedroom	\$106
2-Bedroom	\$126
3-Bedroom	\$147

49. Describe this development’s approach to accessibility, including the number and percent of accessible units proposed for each of level of accessibility (i.e. Type A and B units). Elaborate on this development’s plan to meet or exceed WHEDA’s minimum requirements as well as exceeding building code standards for Type A units. For rehab, describe the accessibility modifications that will be incorporated into the existing development.

The project will seek to maximize accessibility by committing to a minimum of 50% of the units (30 units) that can be convert into Type A units on an as needed basis and the remaining units being Type B. The minimum Type A for this building would be 2 per building code, and WHEDA does not have a minium standard for Type A units. As described below, the project will exceed WHEDA's Universal Design.

50. Describe this development’s level of commitment to the principles of Universal Design. Explain the extent to which the development team will incorporate the greatest feasible levels of Universal Design in residential units, commercial spaces, and common areas in accordance with the requirements outlined in the RFP. What percentage or number of units in the proposed development will incorporate Universal Design principles?

In addition to an increased number of Type A units, the project design goal is to incorporate WHEDA’s Universal Design requirements into all of the units regardless of being designated as Type A or Type B. Common areas will also be designed with Universal Design concepts to allow for all building occupants to utilize these spaces.

**ENERGY EFFICIENCY, RENEWABLE ENERGY, DECARBONIZATION & SUSTAINABLE DESIGN**

51. Describe your organization’s experience developing projects that incorporate extraordinary sustainability, energy efficiency, decarbonization/electrification, and/or green building design? Please list any awards, industry standards or third-party certifications achieved on projects developed in the past ten years, such as LEED®, WELL, ENERGY STAR, Passive House, etc.

The Alexander Company has an extensive history of development projects that incorporate sustainability measures, adaptively reusing materials and sites, and capitalizing on embodied energy to reduce carbon footprints wherever possible. We ensure our developments are certified by the Wisconsin Green Built Home program – a third-party program which recognizes buildings that provide superior environmental performance, and receive Green Built certifications accordingly. We have incorporated solar arrays in prior projects to produce enough energy to offset approximately 20% of the annual electricity consumption, and anticipate incorporating the same in this project. Awards related to design and sustainability over the past ten years include: 2022 Best of AEC Wisconsin: Developer; 2022 Design Excellence Award; 2022 Mayor’s Design Award; 2022 Milwaukee Business Journal Real Estate Award; The Daily Reporter’s Top Projects of 2021 Award; 2021 ACHP/HUD Secretary’s Award for Excellence in Historic Preservation; 2021 Richard H. Driehaus foundation National Preservation Award; The Plan’s Award 2021; Fast company’s 2021 Innovation by Design Award; 2021 Best Private Developer Award; 2021 Best Adaptive Reuse Project; 2021 Preservation Award; 2021 Commercial Design Award.

52. Describe how the proposed development will contribute to the City’s goal of reaching 100% renewable energy and net-zero carbon emissions community-wide by 2050. What size/range of solar array is anticipated? If not yet known, what percentage of on-site electricity use is the development aiming to provide via the solar array. Please describe any other renewable energy systems to be included in the development, such as solar thermal, solar hot water, geothermal, etc.

The project's goal is to offset all common area electrical needs with rooftop mounted solar panels. The current proposed size array is to be 30kW, which is currently anticipated to exceed the goal. The project is seeking Wisconsin Green Built Homes Gold Standard in addition to ENERGY STAR Multifamily certification for energy efficiency. The project will have EV and EV ready parking stalls.

The project is seeking a variance to allow us to build to the 2021 edition of the International Building Code, we gain more flexibility in how we can design the podium portion of the building. With the modern code, we are able to refine the building massing and utilize concrete framing with a high embodied energy only where necessary. Replacing these sections with wood framing with has a negative embodied energy and offsetting our buildings overall carbon footprint.

To the extent feasible, we will recycle construction debris from the demolition of the project.

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

In addition to participating in Focus on Energy, the project will also be seeking Green Built Home – Gold, ENERGY STAR Multifamily New Construction & EPA AirPLUS certification. The confirmation page is attached to the application.

54. Please describe all design and equipment choices to reduce fossil fuel consumption and help achieve decarbonization, such as air-source or ground-source heat pumps, electric or heat-pump water heaters, electric stoves, EV charging infrastructure, battery storage, etc.

All equipment and appliances will be specified as high efficiency or ENERGY STAR rated with LED light fixtures used throughout the project. Resident stoves, ranges and clothes dryers will be electric. Hot water will be provided to all units from a common hot water loop system. We anticipate roughly 2 EV charging stations with 2 more that will be EV ready.

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

All equipment and appliances will be specified as high efficiency or ENERGY STAR rated with LED light fixtures used throughout the project. Resident stoves, ranges and clothes dryers will be electric. Hot water will be provided to all units from a common hot water loop system.

**REAL ESTATE PROJECT DATA SUMMARY**

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

	# of Units Prior to Purchase	# of Units Post-Project	# Units Occupied at Time of Purchase	# Biz or Residential Tenants to be Displaced	# of Units Accessible Current?	Number of Units Post-Project Accessible?	Appraised Value Current (Or Estimated)	Appraised Value After Project Completion (Or Estimated)	Purchase Price
Address:	Enter Address 1								
	29 S. Mills Street	60	0	4	0	30	2,750,000	6,325,000	\$2,750,000
Address:	Enter Address 2								
Address:	Enter Address 3								

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

N/A

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

The current, occupied community center is located on the site. The entire building will be demolished.

59. 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.

Neighborhood House is looking for and has a lead on temporary space nearby on Regent St. and partnering with a local organization or school if needed. They will also utilize a nearby city park to do programming outdoors when possible.

The four business/non-profit tenants that rent space will be permanently relocating. When tenants signed leases with the Neighborhood House, they were aware of the upcoming redevelopment project and that they would eventually need to find another space. They have offered to help tenants look for space if needed. Two of their tenants currently only rent storage space.

## DEVELOPMENT TEAM

60. For applicants applying under the HOME-ARP set-aside, please describe the development team's experience using federal HOME funds in detail, including a list of projects the team has developed using such funds. Please enter N/A if this question does not apply.

N/A

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

A single purpose, for profit entity will be formed to own the real estate. An institutional investor member will be brought in as a 99.99% member and will receive tax credits in exchange for it's capital contribution into the partnership. A single pupose, for profit entity will be formed to be the managing member entity of the ownership entity. The Alexander Company will be the 49% managing member of this entity and the Neighborhood House will be the 51% member. Within the Alexander Company, Joseph M. Alexander owns 51% of the stock and is the President and Nicolas P. Alexander owns 49% of the stock and is the Vice President. A organizational chart is included in the The Alexander Company Development Team Experience attachment.

62. 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 (as memorialized in organizational documents), Right of First Refusal, or General Partner Purchase Option. If not, please elaborate on how the non-profit organization will be involved in the long-term ownership of the development.



The site redevelopment project is a collaboration between The Alexander Company and Neighborhood House, working together as co-developers. In the partnership, Neighborhood House will qualify as an Emerging Developer on the WHEDA tax credit application. Both organizations will also be owners in the managing member entity, with Neighborhood House holding a 51% ownership stake and The Alexander Company holding 49%. The Alexander Company will be providing guarantees for the project and therefore have the controlling interest until such time as there are no guarantees.

Neighborhood House will be given a right of first refusal at the end of the 15-year compliance period for the Low-Income Housing Tax Credits to acquire the Project or membership interests of the third-party investor member at a price specified in Code Section 42(i)(7). Additionally, Neighborhood House will have the opportunity to purchase the Alexander Company's interest in the managing member for a nominal \$100.

63. For projects that will be co-developed with a BIPOC or minority developer, please explain the BIPOC or minority developer role in the development. State what percentage stake the BIPOC or minority developer will have in the development, cash flow, etc. (as memorialized in organizational documents). If the development team will partner with a BIPOC or minority developer but will not provide a stake in the organization structure, please explain this decision and elaborate on how the BIPOC or minority developer will be involved in the long-term ownership of the development.

N/A

64. 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
Adam Winkler	The Alexander Company, Inc.	Development Projec Manager	ajw@alexandercompany.com	608-268-8129
Christopher Qualle	The Alexander Company, Inc.	Architect	cdq@alexandercompany.com	608-268-8108
TBD		General Contractor		
Kevin Martin	Michael Best & Friedrich LLP	Legal Counsel	kamartin@michaelbest.com	608-257-7467
Jenni Lippitt	The Alexander Company, Inc.	Property Management	jml@alexandercompany.com	608-268-8134
Melissa Sorensen	The Salvation Army of Dane County	Service Provider	melissa.sorensen@usc.salvationarmy.org	608-250-2237
Jeremiah Leigh	The Alexander Company, Inc.	Owner's Rep.	jl@alexandercompany.com	608-268-8133
Trent Kleist	Baker Tilly	Cost Cert/ Accountant	trenton.kleist@bakertilly.com	608-240-6715
Garrick Gibson	Baker Tilly	Financial Modeling	garrick.gibson@bakertilly.com	737-209-4267

65. 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	BIPOC		Women	
		#	%	#	%
	Developer				
Neighborhood House Community Center, Inc.	Co-Developer	11	67%	12	80%
The Alexander Company, Inc.	Co-Developer	19	27%	32	45%
TBD	General Contractor				
The Alexander Company, Inc.	Property Manager	19	27%	32	45%
The Alexander Company, Inc.	Architect	19	27%	32	45%
Salvation Army of Dane County	Service Provider	28	46%	43	71.6%

66. Will the development team commit to making annual payments on the AHF Cash Flow Note concurrently with repayment of the deferred developer fee? If yes, explain how this will be memorialized in organizational documents, including the final Amended and Restated Operating Agreement.

The development team will commit to making annual payments on the portion of the funds attributed to the AHF Cash Flow Note after the payment of the deferred developer fee. In order to make the project feasible Neighborhood House is contributing its land to the project at no cost. Since a large portion of the deferred development fee will be paid to Neighborhood House Community Center, it is important that the cash flow be put to the payment of those fees to make the project viable. Payments to the City on the cash flow promissory note will be made should any cash flow become available during the 16 year loan term after the developer fee has been repaid.

## REFERENCES

67. Please list at least three municipal/financing references who can speak to your work on similar developments completed by your team.

Name	Relationship	Email Address	Phone
Chris Caperton	Deputy Director of Fairfax County Office of Community Revitalization (Liberty Crest, Lorton Virginia Project)	chris.caperton@fairfaxcounty.gov	703-324-9310
Corrie Bobe	Director of Economic Development and Tourism- City of Danville, Virginia (White Mill Project)	corrie.bobe@discoverdanville.com	434-793-1753
Robert Azar	Deputy Director- City of Providence Department of Planning + Development (Paragon Mill Project)	razar@providenceri.gov	401-680-8524

**PLEASE ATTACH THE FOLLOWING ADDITIONAL INFORMATION** (such as assessment and referral, on-site intensive case management, etc.) **AND CHECK THE BOX WHEN ATTACHED:**

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

NOTE: If a preliminary site plan is not available at the time of application, submittal will be required for DAT on September 14, 2023 with submittal with week prior. If the Capital Needs Assessment is not available at the time of application for a rehab project, submittal will be required by September 15, 2023.

APPLICANT & PROJECT NAME:

**Neighborhood House Apartment**

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:						
<b>First Mortgage - WHEDA</b>	\$ 4,858,767	Y	6.45%	15	35	\$350,253
Subordinate Loan 1-Lender Name:						
<b>WHEDA Subordinate Debt</b>	\$ 631,640	Y	3.00%	15	19	\$31,956
Subordinate Loan 2-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
City Request (AHF, HOME, TIF)						
<b>City AHF Request</b>	\$ 1,985,000	N	2.75%	30	30	cash flow
Subordinate TIF Loan-Lender Name:						
AHP Loan (List FHLB):						
<b>FHLB</b>	\$ 1,000,000	N	0.00%	40		
Dane County AHDF:						
<b>Dane County AHDF</b>	\$ 1,360,000	N	2.00%	30	IO	cash flow
Other-Specify Lender/Grantor:						
<b>Capital Campaign Neighborhood House</b>	\$ 1,435,955	N/A				
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 13,598,065					
Historic Tax Credit Equity (Fed and/or State)						
Deferred Developer Fees	\$ 1,200,000					
Owner Investment						
Other-Specify:						
<b>Land Contribution Neighborhood House</b>	\$ 2,750,000					
<b>Total Sources</b>	<b>\$ 28,819,427</b>					

Do you plan on submitting an application for TIF?

No

<b>Construction Financing</b>			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan 1-Lender Name:			
<b>WHEDA Tax Exempt Construction Loan</b>	\$ 14,077,412	6.45%	24
Construction Loan 2-Lender Name:			
Construction Loan 3-Lender Name:			
Construction Loan 4-Lender Name:			
Bridge Loan-Lender Name:			24
Housing Tax Credit Equity:	\$ 4,079,419		
Historic Tax Credit Equity:			
Other-Specify:			24
<b>Total</b>	<b>\$ 18,156,831</b>		

Estimated pricing on sale of Federal Tax Credits: \$ 0.89

Estimated pricing on sale of State Tax Credits: \$ 0.72  
(if applicable)

Remarks Concerning Project Funding Sources:

Neighborhood House Community Center will be contributing both their land and capital campaign proceeds for their TI buildout for the Neighborhood House Community Facility as equity in the partnership. The Facility will be treated as a Community Service Facility for LIHTC purposes.

APPLICANT:

Neighborhood House Apartments

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$2,750,000
Existing Buildings/Improvements	\$0
Other (List)	
	\$0

Construction:	
Construction/Rehab Costs	\$16,218,708
E - Equipment & Furnishings	\$255,000
F - Special Construction & Demolition	\$1,435,955
Accessory Buildings	\$0
Personal Property/FF&E	\$0
Site Work Costs (on-site & off-site)	incl
Landscaping	incl

<---

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

Contractor Fees:	
General Requirements	\$921,518
Construction Overhead	\$368,607
Construction Profit	\$921,518
Construction Supervision	\$0

Contingency Funds:	
Construction Contingency	\$921,518
Other Contingency	\$0

Construction Period Expenses/Soft Costs:	
Construction Loan Origination Fee	\$140,774
Construction Loan Credit Enhancement/LOC	\$0
Cost of Bond Issuance	\$0
Bridge Loan Fees and Expenses	\$0
Construction Loan Interest	\$546,087
Construction Loan Origination Fee	\$0
Construction Period Real Estate Taxes	\$0
Title and Recording	\$0
Builder's Risk/Property Insurance	\$80,000
Temporary Relocation Assistance	\$0
Permanent Relocation Assistance	\$0
Other Interim/Construction Costs (list)	
Building Permit	\$207,878

Permanent Financing Expenses:	
Permanent Loan Origination Fee	\$0
Credit Enhancement	\$0
Other Permanent Loan Fees	\$0
Legal Fees - Real Estate	\$60,000

Architectural & Engineering:

Architect - Design	\$935,452
Architect - Supervision	\$0
Engineering	\$0
Survey	\$8,000
Other Architect/Engineering (list)	
	\$0
<b>Syndication Fees &amp; Expenses:</b>	
Organizational Fees	\$70,000
Other Syndication Costs (list)	
	\$0
<b>Capitalized Reserves:</b>	
Operating Reserve	\$0
Replacement Reserve	\$0
Lease-Up Reserve	\$285,000
Debt Service Reserve	\$0
Capital Needs Reserve	\$0
Other Reserves	\$0
Escrows	\$0
Other Capitalized Reserves (list)	
	\$0
<b>Reports, Studies &amp; Related Work:</b>	
Appraisal	\$7,500
Market Study	\$7,500
Environmental Reports	\$5,000
Capital Needs Assessment Report	\$0
Other (list)	
	\$0
<b>Other Soft Costs:</b>	
Tax Credit Fees - Application	\$2,000
Tax Credit Fees - Compliance	\$1,500
Tax Credit Fees - Allocation	\$155,163
Permits & impact fees - water, sewer, etc.	\$42,750
Cost Certification/Accounting fees	\$12,000
Lease-Up Period Marketing	\$25,000
Title Insurance and Recording	\$10,000
Capital Needs Assessment (rehab only)	\$0
Legal	\$0
Other (list)	
	\$25,000
<b>Developer Earned Fees &amp; Expenses:</b>	
Developer's Fee	\$2,400,000
Developer Overhead	\$0
Consultant Fees	\$0
Other fees (list)	
	\$0
<b>Total Costs:</b>	<b>\$28,819,427</b>

APPLICANT: Neighborhood House Apartments

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	862,308	879,554	897,145	915,088	933,390	952,058	971,099	990,521	1,010,331	1,030,538	1,051,149	1,072,172	1,093,615	1,115,487	1,137,797	1,160,553
Less Vacancy/Bad Debt	60,362	61,569	62,800	64,056	65,337	66,644	67,977	69,336	70,723	72,138	73,580	75,052	76,553	78,084	79,646	81,239
<b>Income from Non-Residential Use*</b>		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Revenue</b>	<b>801,946</b>	<b>817,985</b>	<b>834,345</b>	<b>851,032</b>	<b>868,053</b>	<b>885,414</b>	<b>903,122</b>	<b>921,184</b>	<b>939,608</b>	<b>958,400</b>	<b>977,568</b>	<b>997,120</b>	<b>1,017,062</b>	<b>1,037,403</b>	<b>1,058,151</b>	<b>1,079,314</b>
<b>Expenses:</b>																
Office Expenses and Phone	10,506	10,821	11,146	11,480	11,825	12,179	12,545	12,921	13,309	13,708	14,119	14,543	14,979	15,428	15,891	16,368
Real Estate Taxes	129,203	133,079	137,072	141,184	145,419	149,782	154,275	158,904	163,671	168,581	173,638	178,847	184,213	189,739	195,431	201,294
Advertising, Accounting, Legal Fees	3,090	3,183	3,278	3,377	3,478	3,582	3,690	3,800	3,914	4,032	4,153	4,277	4,406	4,538	4,674	4,814
Payroll, Payroll Taxes and Benefits	70,143	72,247	74,415	76,647	78,947	81,315	83,754	86,267	88,855	91,521	94,266	97,094	100,007	103,007	106,098	109,281
Property Insurance	16,506	17,001	17,511	18,036	18,577	19,135	19,709	20,300	20,909	21,536	22,182	22,848	23,533	24,239	24,966	25,715
Mtc, Repairs and Mtc Contracts	51,603	53,151	54,746	56,388	58,080	59,822	61,617	63,465	65,369	67,330	69,350	71,431	73,574	75,781	78,054	80,396
Utilities (gas/electric/fuel/water/sewer)	52,221	53,788	55,401	57,063	58,775	60,538	62,355	64,225	66,152	68,137	70,181	72,286	74,455	76,688	78,989	81,359
Property Mgmt	48,588	50,046	51,547	53,094	54,686	56,327	58,017	59,757	61,550	63,397	65,298	67,257	69,275	71,353	73,494	75,699
Operating Reserve Pmt		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	18,540	19,096	19,669	20,259	20,867	21,493	22,138	22,802	23,486	24,190	24,916	25,664	26,434	27,227	28,043	28,885
Support Services		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	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Operating Expenses</b>	<b>400,400</b>	<b>412,412</b>	<b>424,785</b>	<b>437,528</b>	<b>450,654</b>	<b>464,174</b>	<b>478,099</b>	<b>492,442</b>	<b>507,215</b>	<b>522,431</b>	<b>538,104</b>	<b>554,247</b>	<b>570,875</b>	<b>588,001</b>	<b>605,641</b>	<b>623,810</b>
<b>Net Operating Income</b>	<b>401,546</b>	<b>405,573</b>	<b>409,561</b>	<b>413,504</b>	<b>417,399</b>	<b>421,240</b>	<b>425,023</b>	<b>428,743</b>	<b>432,393</b>	<b>435,969</b>	<b>439,464</b>	<b>442,872</b>	<b>446,187</b>	<b>449,402</b>	<b>452,510</b>	<b>455,504</b>
<b>Debt Service:</b>																
First Mortgage	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
Asset Management Fee	5,000	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
<b>Total Debt Service</b>	<b>355,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>
<b>Total Annual Cash Expenses</b>	<b>755,653</b>	<b>762,665</b>	<b>775,038</b>	<b>787,781</b>	<b>800,907</b>	<b>814,427</b>	<b>828,352</b>	<b>842,695</b>	<b>857,468</b>	<b>872,684</b>	<b>888,357</b>	<b>904,500</b>	<b>921,128</b>	<b>938,254</b>	<b>955,894</b>	<b>974,063</b>
<b>Total Net Operating Income</b>	<b>46,293</b>	<b>55,320</b>	<b>59,308</b>	<b>63,251</b>	<b>67,146</b>	<b>70,987</b>	<b>74,770</b>	<b>78,490</b>	<b>82,140</b>	<b>85,716</b>	<b>89,211</b>	<b>92,619</b>	<b>95,934</b>	<b>99,149</b>	<b>102,257</b>	<b>105,251</b>
<b>Debt Service Reserve</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Deferred Developer Fee</b>	<b>46,293</b>	<b>55,320</b>	<b>59,308</b>	<b>63,251</b>	<b>67,146</b>	<b>70,987</b>	<b>74,770</b>	<b>78,490</b>	<b>82,140</b>	<b>85,716</b>	<b>89,211</b>	<b>92,619</b>	<b>95,934</b>	<b>99,149</b>	<b>102,257</b>	<b>37,409</b>
<b>Cash Flow</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>67,842</b>
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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

<b>DCR Hard Debt</b>	1.15	1.16	1.17	1.18	1.19	1.20	1.21	1.22	1.23	1.24	1.25	1.26	1.27	1.28	1.29	1.30
<b>DCR Total Debt</b>	1.13	1.16	1.17	1.18	1.19	1.20	1.21	1.22	1.23	1.24	1.25	1.26	1.27	1.28	1.29	1.30

**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:

Pet fees are assumed to be \$40/month for 40% of units



APPLICANT:

Neighborhood House Apartments

3. PROJECT PROFORMA (cont.)

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

	Year 17	Year 18	Year 19	Year 20	Year 21	Year 22	Year 23	Year 24	Year 25	Year 26	Year 27	Year 28	Year 29	Year 30
Gross Income	1,183,764	1,207,439	1,231,588	1,256,220	1,281,344	1,306,971	1,333,111	1,359,773	1,386,968	1,414,708	1,443,002	1,471,862	1,501,299	1,531,325
Less Vacancy/Bad Debt	82,863	84,521	86,211	87,935	89,694	91,488	93,318	95,184	97,088	99,030	101,010	103,030	105,091	107,193
<b>Income from Non-Residential Use*</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Revenue</b>	<b>1,100,901</b>	<b>1,122,919</b>	<b>1,145,377</b>	<b>1,168,285</b>	<b>1,191,650</b>	<b>1,215,483</b>	<b>1,239,793</b>	<b>1,264,589</b>	<b>1,289,881</b>	<b>1,315,678</b>	<b>1,341,992</b>	<b>1,368,832</b>	<b>1,396,208</b>	<b>1,424,132</b>
<b>Expenses:</b>														
Office Expenses and Phone	16,859	17,365	17,886	18,422	18,975	19,544	20,131	20,734	21,357	21,997	22,657	23,337	24,037	24,758
Real Estate Taxes	207,333	213,553	219,960	226,559	233,355	240,356	247,567	254,994	262,644	270,523	278,638	286,998	295,608	304,476
Advertising, Accounting, Legal Fees	4,959	5,107	5,261	5,418	5,581	5,748	5,921	6,098	6,281	6,470	6,664	6,864	7,070	7,282
Payroll, Payroll Taxes and Benefits	112,559	115,936	119,414	122,996	126,686	130,487	134,401	138,433	142,586	146,864	151,270	155,808	160,482	165,297
Property Insurance	26,487	27,281	28,100	28,943	29,811	30,706	31,627	32,576	33,553	34,559	35,596	36,664	37,764	38,897
Mtc, Repairs and Mtc Contracts	82,808	85,292	87,851	90,486	93,201	95,997	98,877	101,843	104,898	108,045	111,287	114,625	118,064	121,606
Utilities (gas/electric/fuel/water/sewer)	83,799	86,313	88,903	91,570	94,317	97,146	100,061	103,063	106,155	109,339	112,619	115,998	119,478	123,062
Property Mgmt	77,970	80,309	82,718	85,200	87,756	90,388	93,100	95,893	98,770	101,733	104,785	107,928	111,166	114,501
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	29,751	30,644	31,563	32,510	33,485	34,490	35,525	36,590	37,688	38,819	39,983	41,183	42,418	43,691
Support Services	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
<b>Total Expenses</b>	<b>642,525</b>	<b>661,800</b>	<b>681,654</b>	<b>702,104</b>	<b>723,167</b>	<b>744,862</b>	<b>767,208</b>	<b>790,224</b>	<b>813,931</b>	<b>838,349</b>	<b>863,499</b>	<b>889,404</b>	<b>916,087</b>	<b>943,569</b>
<b>Net Operating Income</b>	<b>458,376</b>	<b>461,118</b>	<b>463,723</b>	<b>466,180</b>	<b>468,483</b>	<b>470,621</b>	<b>472,585</b>	<b>474,364</b>	<b>475,949</b>	<b>477,329</b>	<b>478,492</b>	<b>479,427</b>	<b>480,122</b>	<b>480,563</b>
<b>Debt Service:</b>														
First Mortgage	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253	350,253
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
Asset Management Fee	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
<b>Total Debt Service</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>	<b>350,253</b>
<b>Total Annual Cash Expenses</b>	<b>992,778</b>	<b>1,012,053</b>	<b>1,031,907</b>	<b>1,052,357</b>	<b>1,073,420</b>	<b>1,095,115</b>	<b>1,117,461</b>	<b>1,140,477</b>	<b>1,164,184</b>	<b>1,188,602</b>	<b>1,213,752</b>	<b>1,239,657</b>	<b>1,266,340</b>	<b>1,293,822</b>
<b>Total Net Operating Income</b>	<b>108,123</b>	<b>110,865</b>	<b>113,470</b>	<b>115,927</b>	<b>118,230</b>	<b>120,368</b>	<b>122,332</b>	<b>124,111</b>	<b>125,696</b>	<b>127,076</b>	<b>128,239</b>	<b>129,174</b>	<b>129,869</b>	<b>130,310</b>
<b>Debt Service Reserve</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Deferred Developer Fee</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Cash Flow</b>	<b>108,123</b>	<b>110,865</b>	<b>113,470</b>	<b>115,927</b>	<b>118,230</b>	<b>120,368</b>	<b>122,332</b>	<b>124,111</b>	<b>125,696</b>	<b>127,076</b>	<b>128,239</b>	<b>129,174</b>	<b>129,869</b>	<b>130,310</b>
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	0

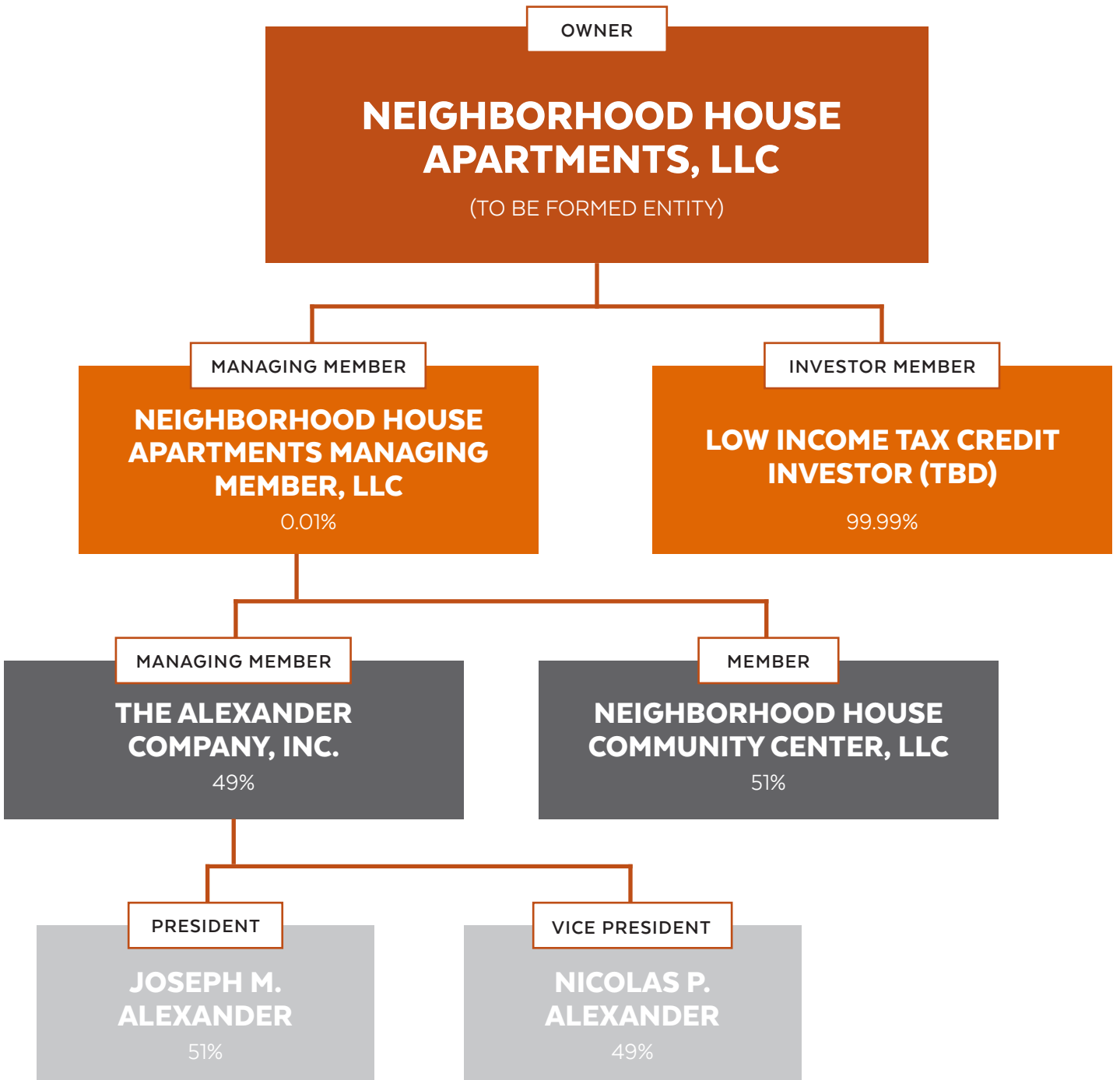
\*Including laundry facilities, vending machines, parking spaces, storage spaces or application fees.

<b>DCR Hard Debt</b>	1.31	1.32	1.32	1.33	1.34	1.34	1.35	1.35	1.36	1.36	1.37	1.37	1.37	1.37
<b>DCR Total Debt</b>	1.31	1.32	1.32	1.33	1.34	1.34	1.35	1.35	1.36	1.36	1.37	1.37	1.37	1.37

**Assumptions**

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

# ORGANIZATION CHART





**DOING  
THE MOST  
GOOD™**



**Brian Peddle**  
General

**Commissioner Brad Bailey**  
Territorial Commander

**Major Steven J. Merritt**  
Divisional Commander

**Captain Michael Sjogren**  
Capital Area Coordinator  
Madison Temple Corps Officer

**Captain Kristina Sjogren**  
Capital Area Program Director  
Madison Temple Corps Officer

**Captains Vong and Ting Luangkhamdeng**  
Madison Genesis Corps Officers

July 21, 2023

Mr. Joseph Alexander  
The Alexander Company, Inc.  
2450 Rimrock Road  
Suite 100.  
Madison, WI 53713

Mr. Samuel Brown  
The Neighborhood House  
29 South Mills Street  
Madison, WI 53715

RE: WHEDA Tax-Credit Rental Housing Development  
The Neighborhood House Project – 29 S Mills St, Madison, WI 53715

Dear Mr. Alexander & Mr. Brown,

The Salvation Army is a worldwide religious and charitable organization dedicated to serving those in need without discrimination. In Dane County, we have one worship and community center and two homeless shelters. Alongside the Single Women’s Shelter and the Emergency Family Shelter, The Salvation Army of Dane County host six housing programs and a Diversion Program – an effort to keep families and individuals from entering the shelter system at all.

My understanding is that The Neighborhood House Project Apartments, located at 29 S Mills St, will be an affordable rental development that will create approximately 12 supportive housing units for individuals/families earning 30% or less of the Dane County area median income. The target population for these supportive housing units is individuals/families whose incomes qualify for the 30% rent restricted units. The available 12 supportive housing units will be generally spread across a mix of 1, 2, & 3 bedroom units at the 30% rent restricted level, but the Alexander Company will work with The Salvation Army to target units types with the greatest need which is currently understood to be slightly greater for 2 and 3 bedroom units but generally needed across all unit types. The Alexander Company will notify the Salvation Army of the number of supportive housing units to be targeted for Salvation Army specific referrals as the project progresses, but currently anticipates approximately 12 units to be targeted to Salvation Army referrals.

The Salvation Army will refer individuals and families that it provides assistance to under our Dane County Assists With New Starts (DAWNS) program and our RISE program to The Neighborhood House Apartments. Individuals and families transitioning from homelessness to housing can be offered a rapid rehousing package through our DAWNS and RISE programs. This package consists of weekly case management sessions, security deposit, and first month’s rental assistance for the DAWNS program and up to a years’ rental assistance in our RISE program. Additional rental assistance may be granted on an individual case by case basis. Case management support can last up to two years and will be provided at the resident’s apartment or Salvation Army offices. The Salvation Army will extend its monetary rental resources and caseworker support under our DAWNS and RISE programs to individuals/families that it prefer to live at The Neighborhood House Apartments.

The Salvation Army strongly supports the proposed apartment community that the Alexander Company and Neighborhood House intend to build as a new affordable housing option that will assist the City of Madison and Dane County's efforts to promote housing stability and/or prevent homelessness.

If you have any questions feel free to call me at (608)-250-2237.

Sincerely,



Melissa Sorensen  
Executive Director of Social Services  
The Salvation Army of Dane County

The Salvation Army of Dane County - P. O. Box 8455, Madison, WI 53708-8455 - 608.256.2321

"...THERE IS NO REWARD EQUAL TO THAT OF DOING THE MOST GOOD TO THE MOST PEOPLE IN THE MOST NEED." - EVANGELINE BOOTH

*Have you remembered The Salvation Army in your will?*



REGENT STREET







S. MILLS STREET

SUBJECT SITE

MILTON STREET

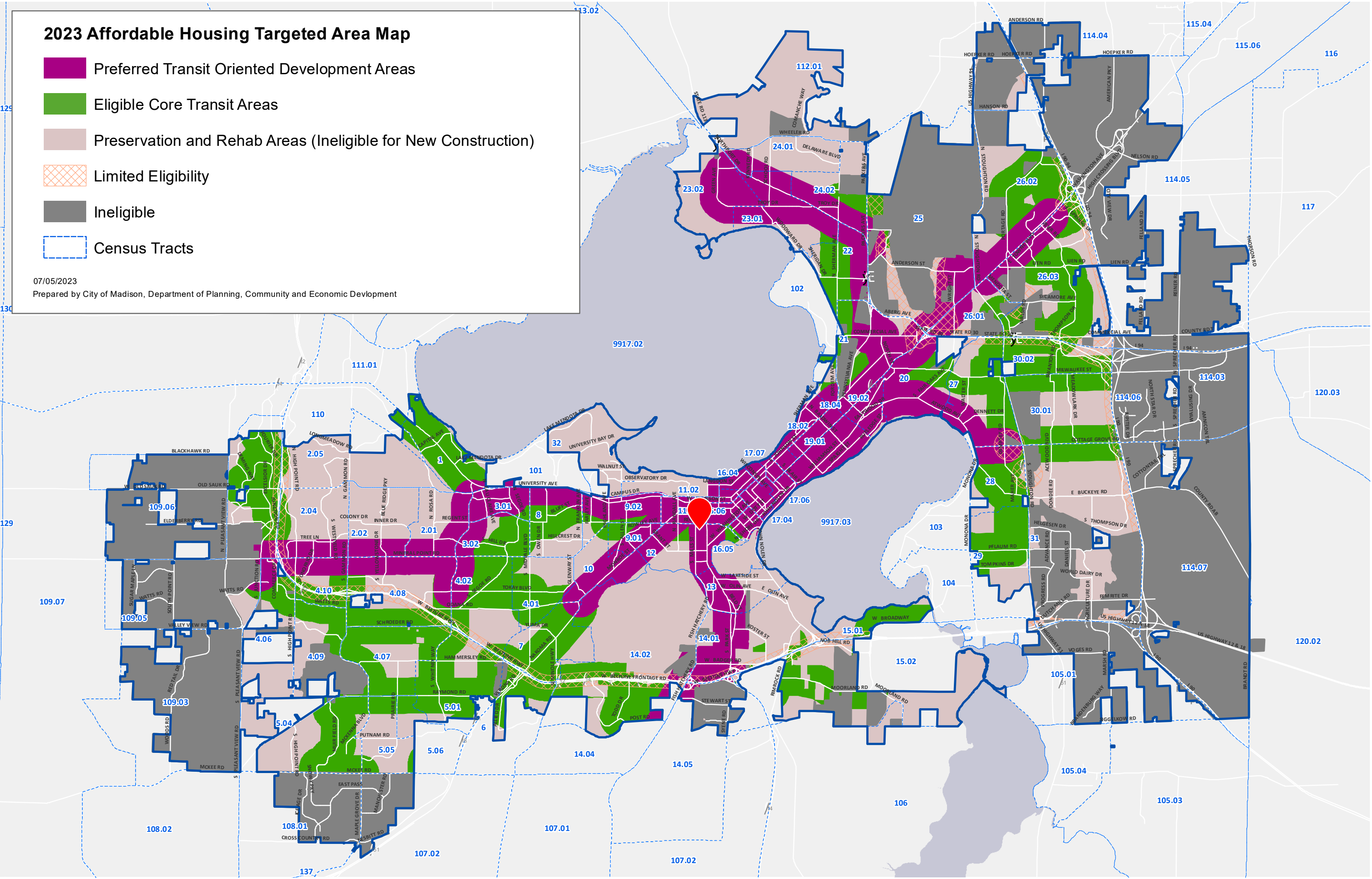
PARK STREET

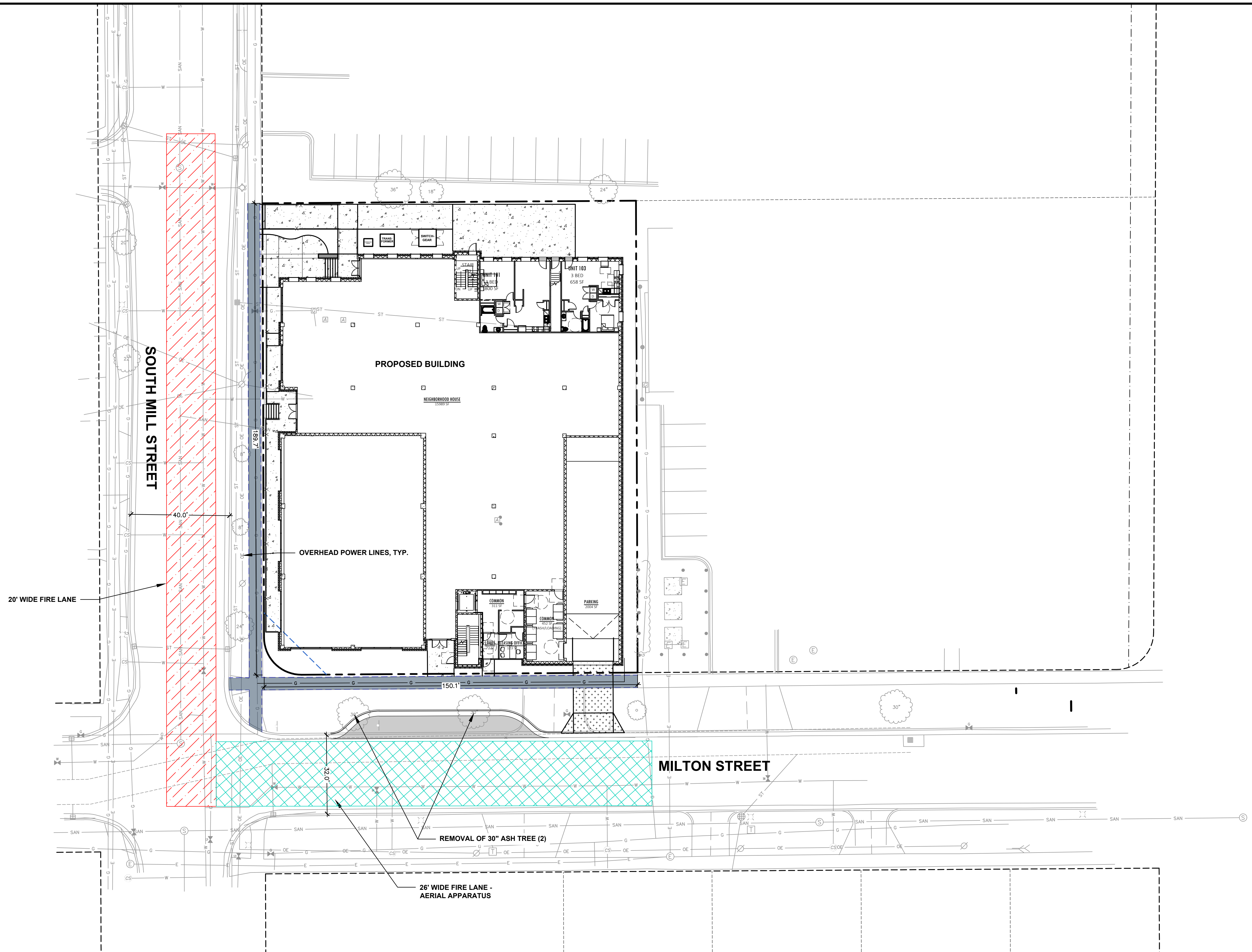
# 2023 Affordable Housing Targeted Area Map

-  Preferred Transit Oriented Development Areas
-  Eligible Core Transit Areas
-  Preservation and Rehab Areas (Ineligible for New Construction)
-  Limited Eligibility
-  Ineligible
-  Census Tracts

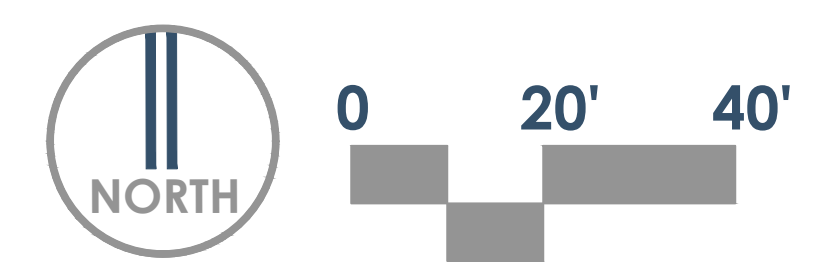
07/05/2023

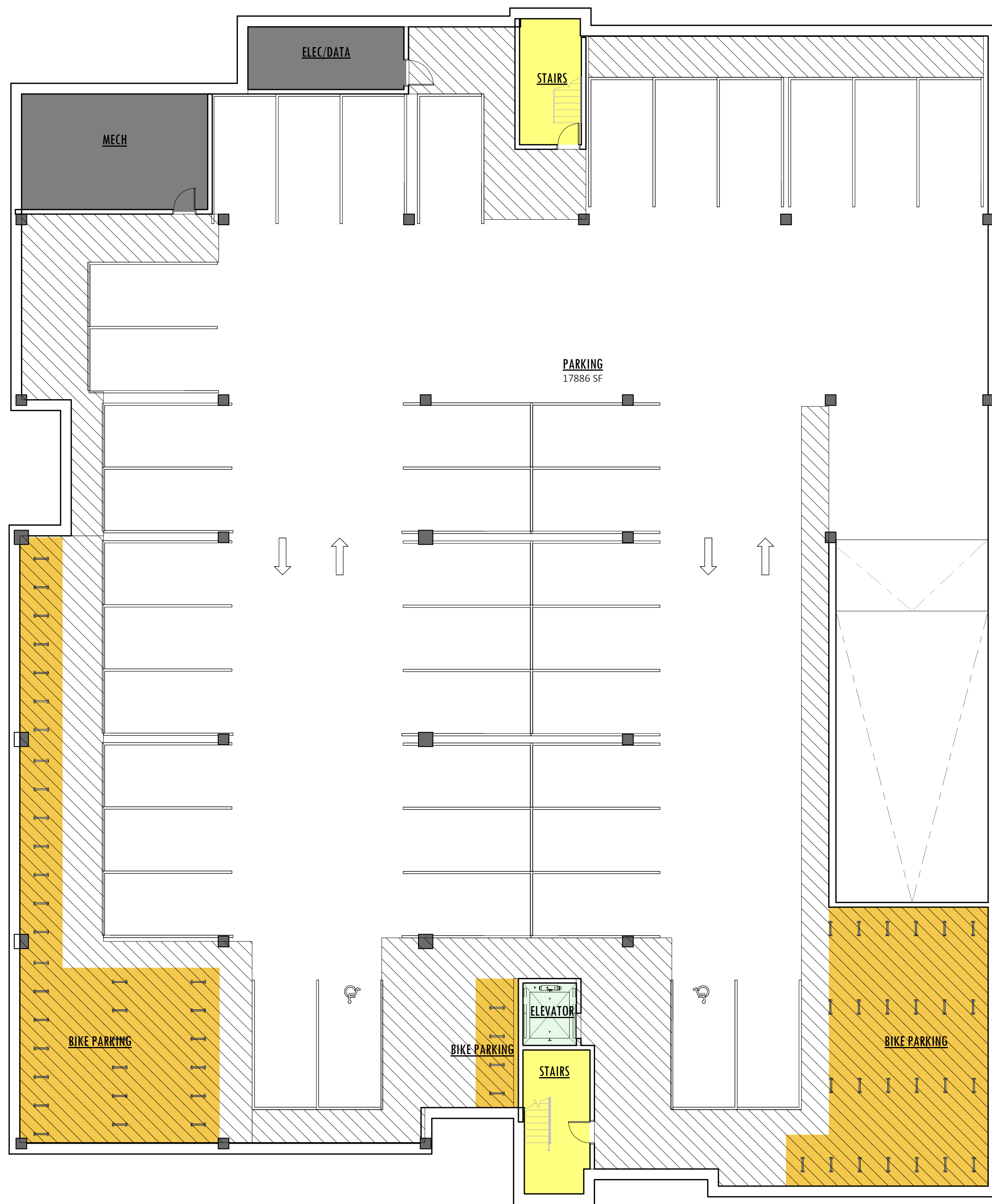
Prepared by City of Madison, Department of Planning, Community and Economic Development



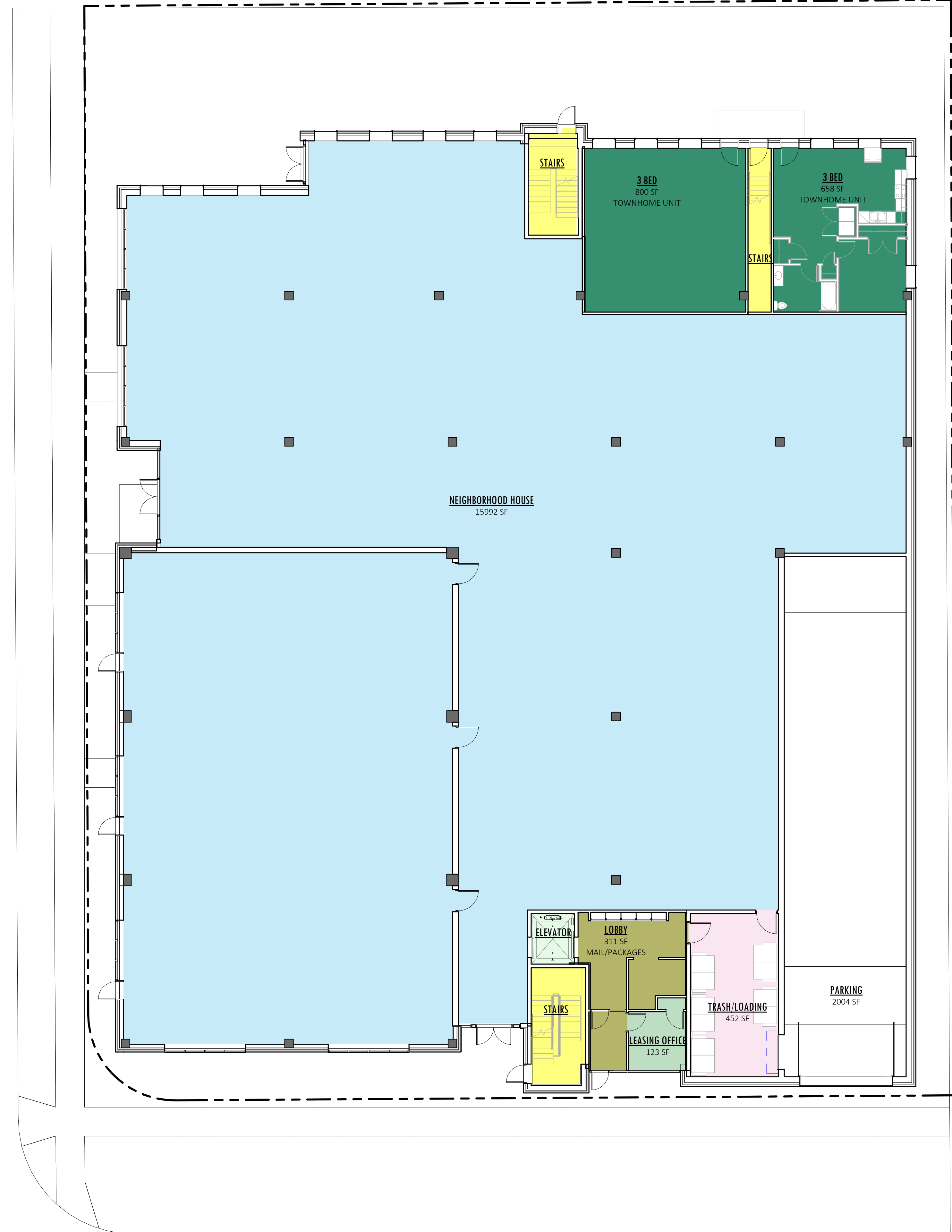


File: I:\2023\231316\DWG\231316 Layout.dwg Layout: CONCEPT SITE PLAN User: cjpennellr PlotDate: Aug 11, 2023 3:27pm Xref(s):





1 LOWER LEVEL FLOOR PLAN  
R.01



2 FIRST FLOOR PLAN  
R.01

DRAWN: Author APPR: Checker

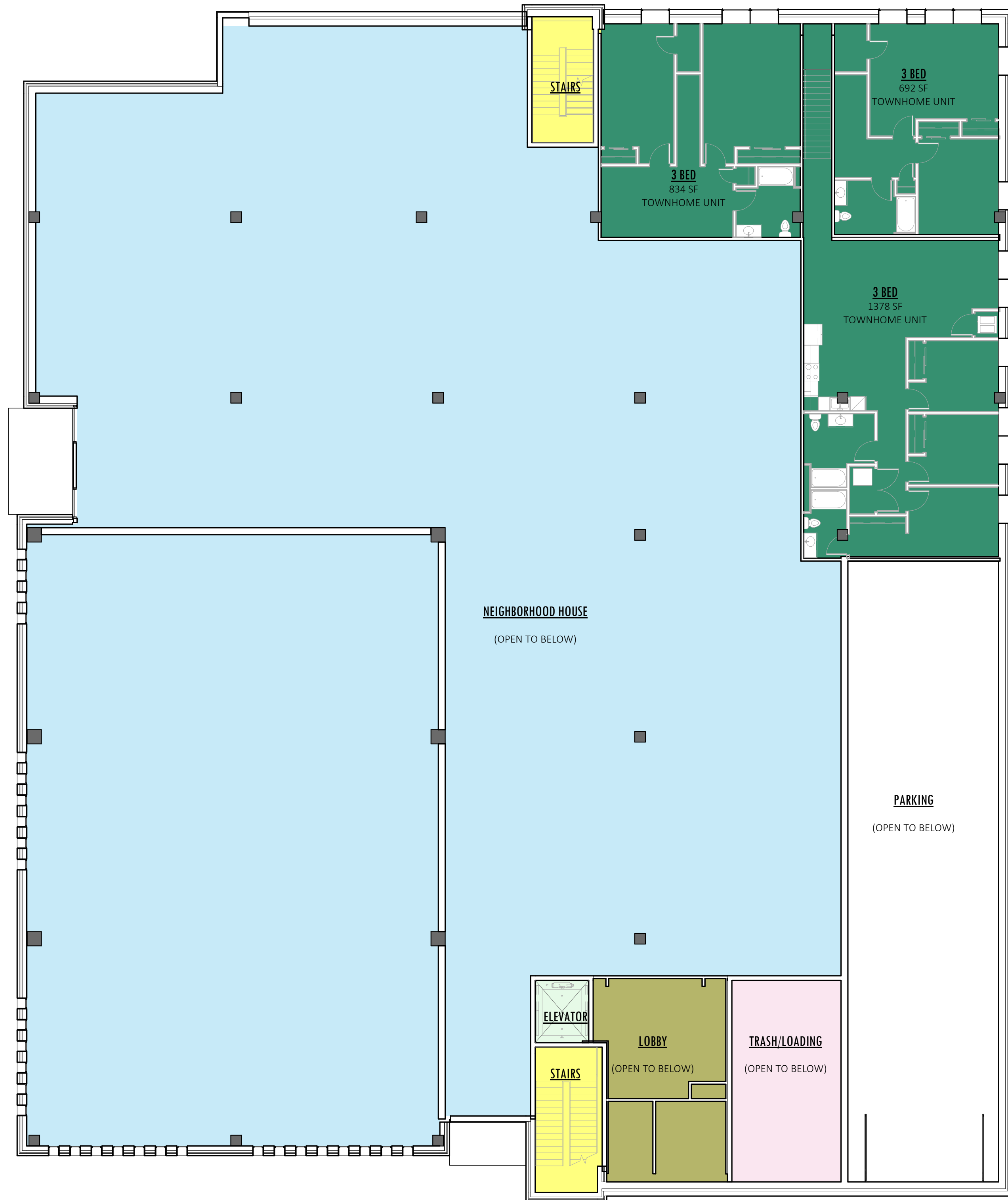
NEIGHBORHOOD HOUSE  
29 S. MILLS STREET  
MADISON, WI 53715

PROJECT # 23-814

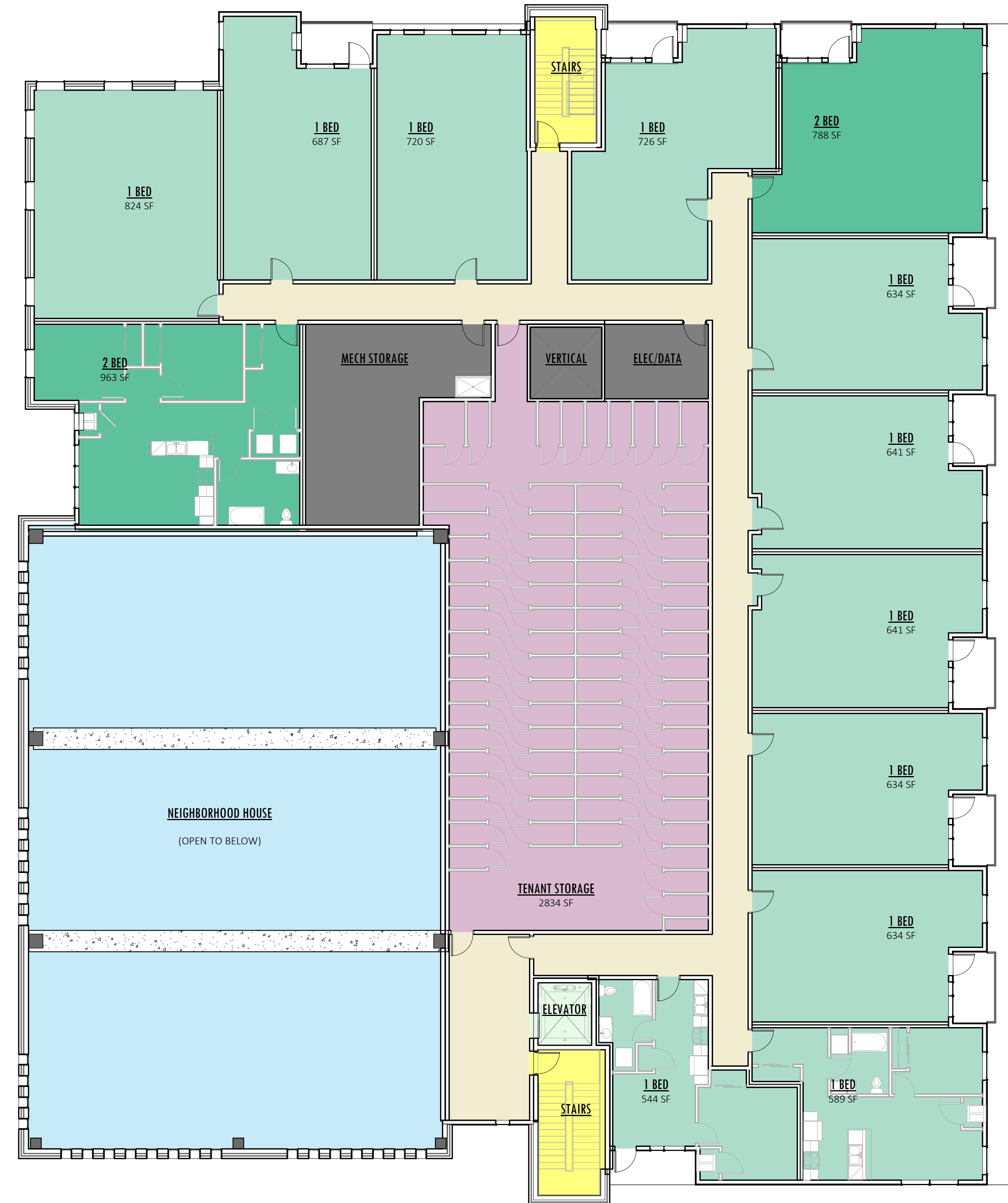
PRESENTATION PLANS

**R.01**





**1** SECOND FLOOR PLAN  
R.02 SCALE: 3/32" = 1'-0"



**2** THIRD FLOOR PLAN  
R.02

DRAWN: Author APPR: Checker

NEIGHBORHOOD HOUSE  
29 S. MILLS STREET  
MADISON, WI 53715

PROJECT # 23-814

PRESENTATION PLANS

**R.02**



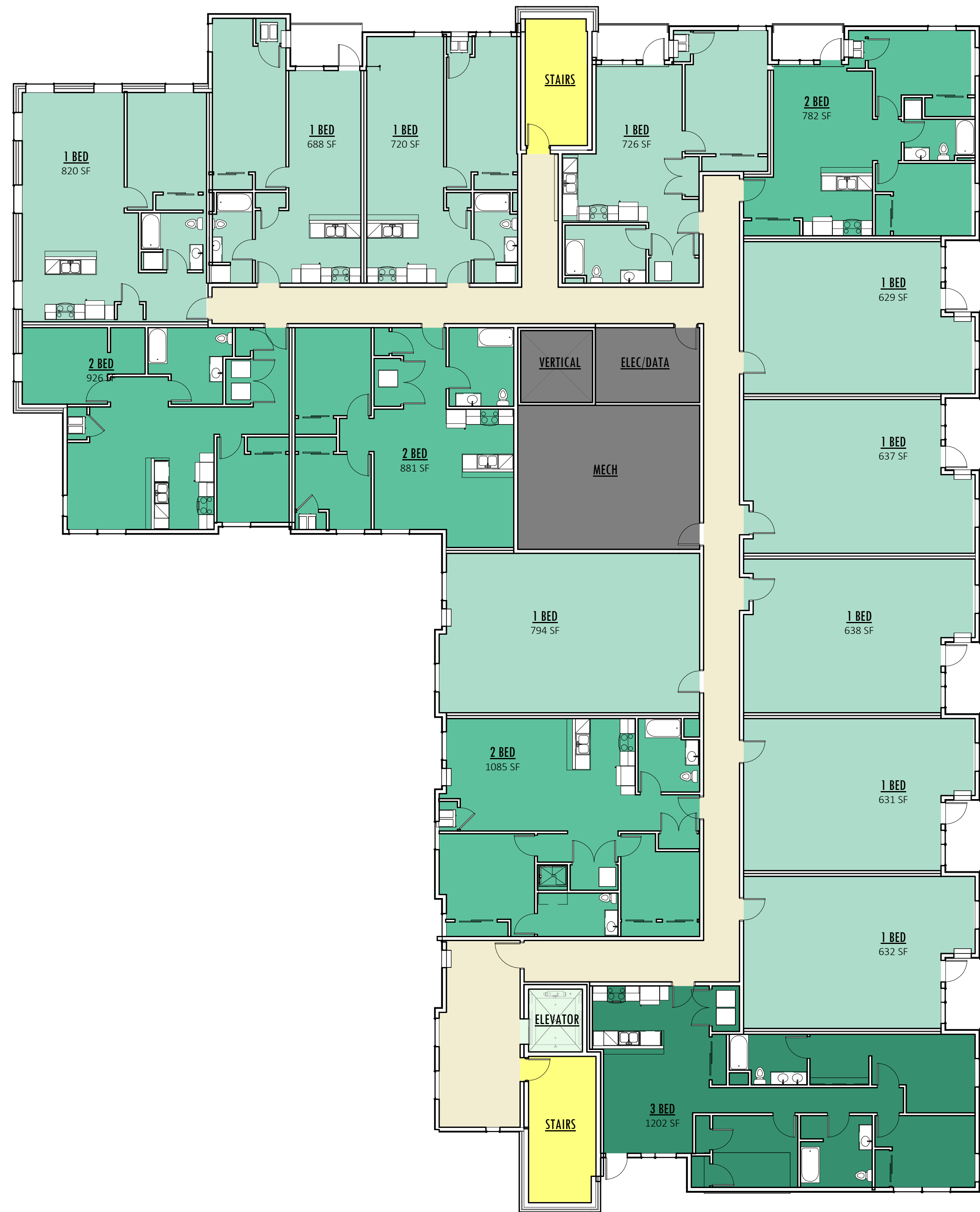
2 FIFTH FLOOR PLAN

6.03

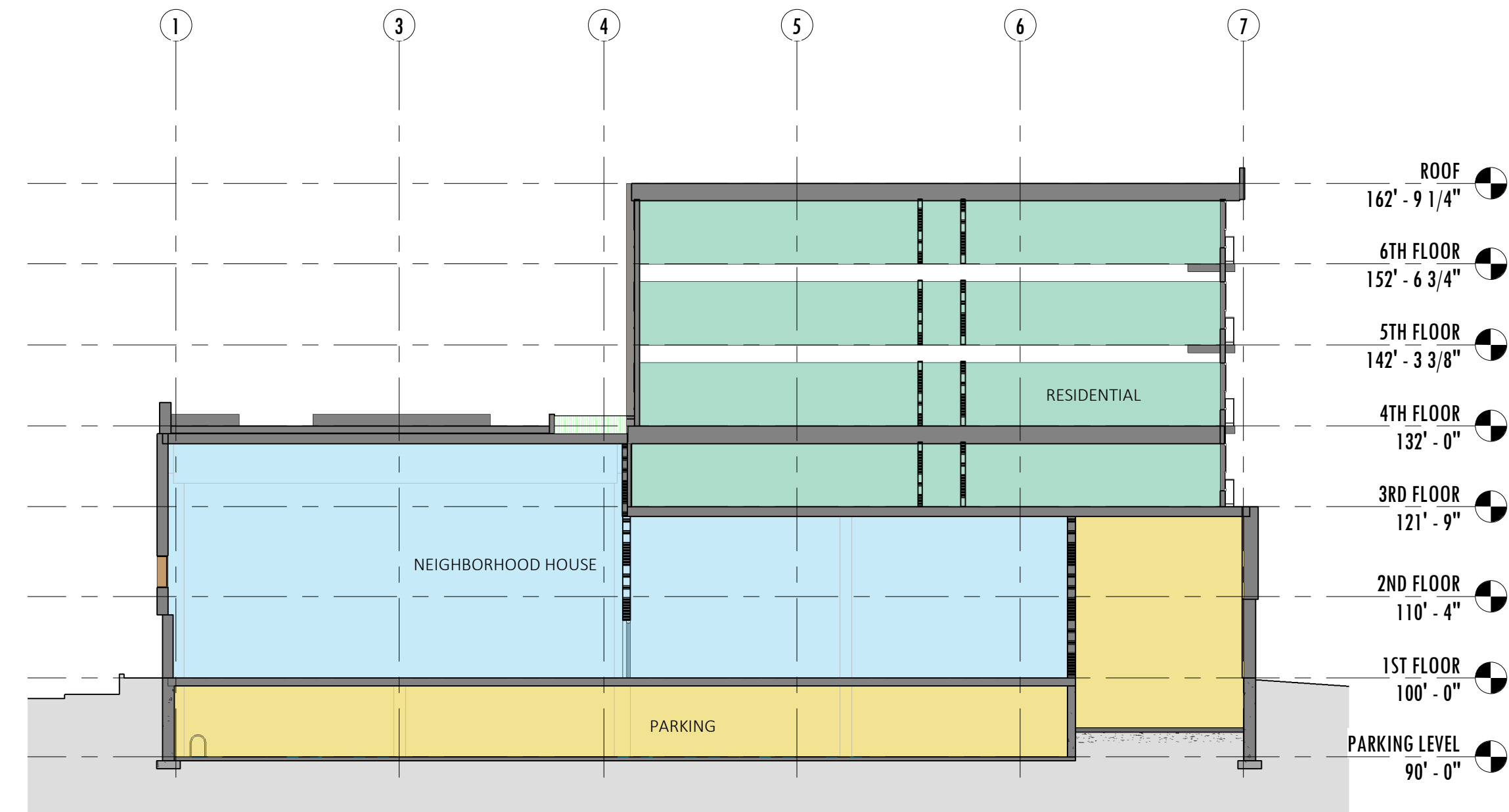


1 FOURTH FLOOR PLAN

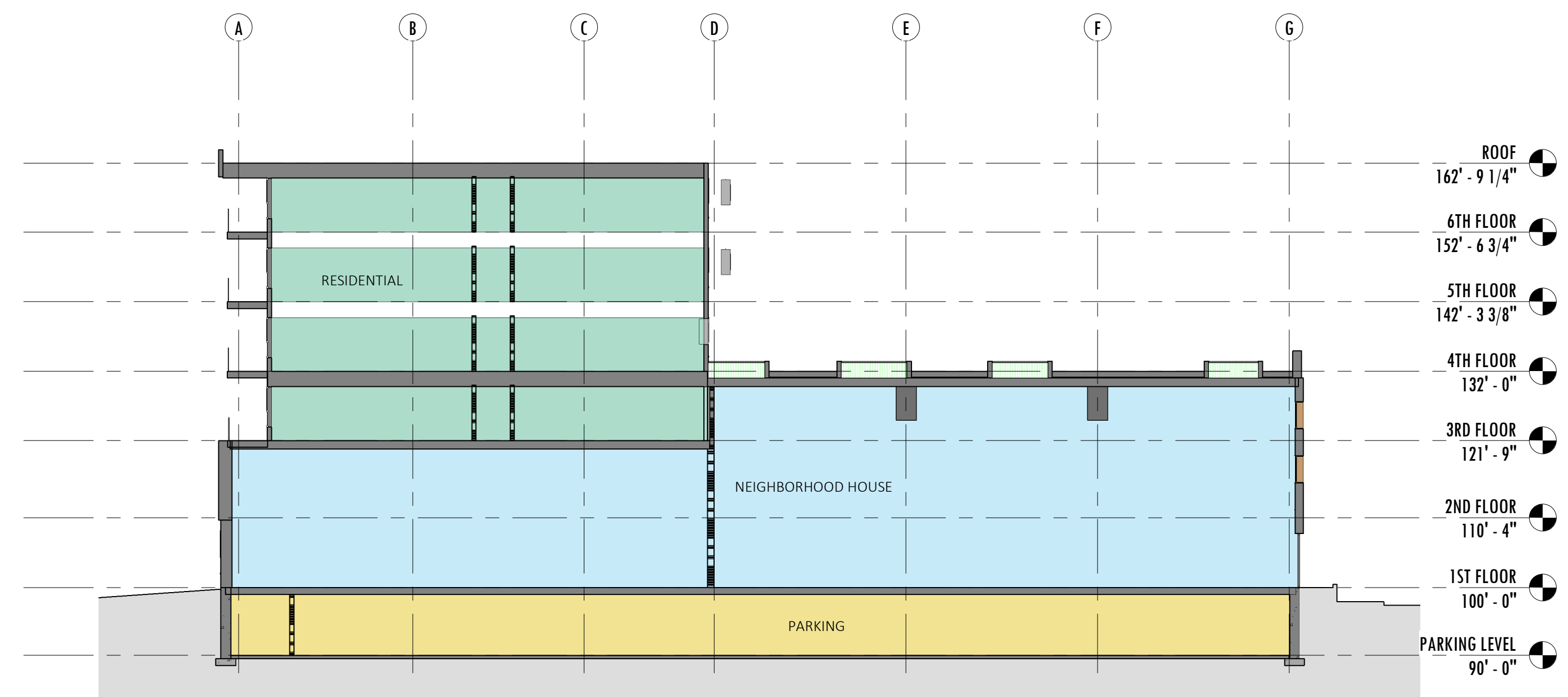
6.03



1 SIXTH FLOOR PLAN  
R.04



3 BUILDING SECTION  
R.04



2 BUILDING SECTION  
R.04

DRAWN: Author APPR: Checker

NEIGHBORHOOD HOUSE  
29 S. MILLS STREET  
MADISON, WI 53715

PROJECT # 23-814

PRESENTATION PLAN

**R.04**



# Welcome to the New Construction Application

- Enter as much information that is known at this time; the rest can be entered later.
- Fields marked with a red bar are required.
- After entering information, click the “Submit” button at the bottom of the page to save your progress.
- Once the information is submitted, you will receive a link via email that can be used to access the form again, or forwarded to others to complete more of the application.

## APPLICATION

---

**FOEMF-1320E-27917**

Created by **Adam Winkler** on 4/6/2023 1:36:25 PM. The Alexander Company, Inc.. [ajw@alexandercompany.com](mailto:ajw@alexandercompany.com) . 608-268-8129

Last modified by Matthew Jarosz on 4/10/2023 8:40:41 AM [Revision 2]. Willdan. [MJarosz@willdan.com](mailto:MJarosz@willdan.com)

[Privacy](#) - [Terms](#)

## TERMS & CONDITIONS

---

[Help](#)

[Read the terms & conditions](#)

I have read and agree to the terms

## PROJECT

---

Required fields are indicated with a red bar.

Project Name:

The Neighborhood House Apartments

Street Address:

29 S. Mill St.

City:

Madison

State:

WI



ZIP:

53715

Electricity Utility Provider:

Madison Gas and Electric Company



Gas Utility Provider:

Madison Gas and Electric Company



## BUILDING OWNER

---

Please ensure all contact information is correct, as incentive checks will be sent to this address.

Company Name:

Neighborhood House Community Center, Inc.

Billing Address:

29 S. Mill St.

City:

Madison

State:

WI



ZIP:

53715

Customer Contact Name:

Phone:

E-mail:

Laura Gundlach

608-255-5337

laura@neighborhoodhousemadison.org

## ENERGY ADVISOR

---

Name:

E-mail:

Phone:

## DESIGN TEAM INFORMATION

---

Only team members listed below with a valid e-mail address will be granted access to view or edit this application.

### Architectural Firm

Company Name:

Contact Name:

Phone:

E-mail:

The Alexander Company, Inc.

Christopher Qualle

608.268.8108

cdq@alexandercompany.com

### General Contractor

Company Name:

Contact Name:

Phone:

E-mail:

### Mechanical Engineer

Company Name:

Contact Name:

Phone:

E-mail:

## Electrical Engineer

Company Name:

Contact Name:

Phone:

E-mail:

## Development Company

Company Name:

Contact Name:

Phone:

E-mail:

## Other Design Team

Company Name:

Contact Name:

Phone:

E-mail:

Company Name:

Contact Name:

Phone:

E-mail:

Company Name:

Contact Name:

Phone:

E-mail:

## PROJECT SCHEDULE

---

Schematic Design

Start Date:

02/15/2023



End Date:

04/30/2023



Notes on Schedule:

## Design Development

Start Date:

05/01/2023



End Date:

08/31/2023



Notes on Schedule:

## Construction Documents

Start Date:

09/01/2023



End Date:

05/01/2024



Notes on Schedule:

## Construction

Start Date:

09/01/2024



End Date:

09/30/2025



Notes on Schedule:

## BUILDING INFORMATION

---

Select one or more of the applicable construction types.

**New Construction**

Building SF:

114,750

Building Type:

Multifamily



Percent Heated:

100%

Percent Cooled:

80%



Addition

Renovation

Year of Construction Completion:

Year of any Remodels:

Year of any Additions:

2025

N/A

N/A

## DESIGN PROCESS

---

Design/Bid/Build Single Package

Design/Bid/Build Multiple Package

Design Build

Unspecified

## DESIGN CONSIDERATION OPTIONS

---

### Willingness to Consider Energy-Saving Alternatives

Orientation/Building layout:  Very  Somewhat  Not at all

Roof insulation:  Very  Somewhat  Not at all

Wall insulation:  Very  Somewhat  Not at all

Glazing type/Window design:  Very  Somewhat  Not at all



Lighting design/controls:  Very  Somewhat  Not at all

Daylighting controls:  Very  Somewhat  Not at all

Heating/Cooling efficiencies:  Very  Somewhat  Not at all

Load-responsive equipment:  Very  Somewhat  Not at all

Outside air control:  Very  Somewhat  Not at all

Other energy design alternatives:

Solar

Special considerations and other comments:

This is a mixed-use project with approximately 65 apartment units and a new community center for the Neighborhood House group.

Where did you hear about Focus on Energy?

Other

## INCENTIVE IMPACT (REQUIRED)

The continued availability of Program incentives and analysis is strongly dependent on the impact each plays in improving the energy efficiency of the design. Please take a moment to answer the following questions.

During the planning stages, were potential incentives from Focus on Energy part of the budget discussion?

Very  Somewhat  No

Are you requesting Design Assistance services to:

Allow the Project to pursue improved energy efficiency?

Very  Somewhat  No

Enable the Project to keep proposed energy efficiency options in the Design?

Very  Somewhat  No

Aid in making energy efficiency design decisions?

Very  Somewhat  No

Play a role in helping the team understand how to best achieve energy efficiency within the construction budget?

Very  Somewhat  No

---

Note: Clicking the 'Submit' button will initiate Program review, but does not finalize this application.  
Upon submission, you will receive an email confirmation including a link to allow you to make further modifications.

Submit



# 2023 Affordable Housing Fund-Tax Credit RFP

## Supplemental Application Questions

Alexander Co.  
Neighborhood House Apartments

---

Response Submission Due Date: September 15, 2023 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](mailto:cddapplications@cityofmadison.com). Please cc: [jspears@cityofmadison.com](mailto:jspears@cityofmadison.com). We ask that you refrain from submitting additional documentation not specifically requested at this time or using alternative formats.

### **Questions:**

#### **A. Land Use and Community Engagement**

- 1. Please describe the feedback that you received from the Development Assistance Team (DAT) presentation anticipated for 9/7/23.**

The DAT meeting went well. Zoning talked in general about setbacks, and it appears as though the project meets the requirements. Jacob had a comment about having an entrance for both the Community Center and residential space off the primary abutting street. He mentioned being in the TOD overlay means we have no usable space requirement.

Engineering mentioned that we will need a developer agreement for work in the ROW. They also did not like the pull off on Milton, which Forestry also didn't like because it would cut down trees and Traffic Engineering felt the same. Engineering also recommended that we look to Mills Street for our service connections.

In lieu of the pull off on Milton, it was mentioned that we can look at designating a loading zoning on the street. The architect mentioned the vision triangle and a slight obstruction. It was suggested that we apply for a vision triangle waiver.

No Comments from Fire.

Trent from Transportation said the project will need a TDM

Parks said they would provide the Park Impact Fee Exemption form

Planning asked to have a follow-up call to go over some design issues. The follow-up occurred Monday, September 11<sup>th</sup>. The bulk of the conversation was simplification of the palette. Also on the call, the primary street was discussed in regards to the entrance for both uses. Zoning is checking to see if that can be Milton.

- 2. Provide an overview of the feedback that received from at the neighborhood meeting scheduled for 9/11/23.**

There were approximately 15 neighbors at the meeting. No major issues were raised. Sustainability was discussed, and the solar array and other sustainable qualities of the

development were discussed.

One issue that that came up was parking. There will be 20 underground spaces for the 60 residential units and 20 underground spaces for the community center. One resident asked if that was enough. The development staff said they would look to see if there was some off-hour parking that could be worked out with the community center's spaces. The topic then moved to the fact that the development is in a preferred TOD area, and the transportation overlay does not have any parking requirements. That seemed to satisfy the crowd. Someone asked about BCycle, and it was stated that BCycle was looked into in the past and hard to get.

Other topics but no concerns were zoning classification, number of units (market and affordable), stormwater, temporary space for Neighborhood House, future programming for Neighborhood House, funding, construction duration, amongst others.

## **B. Energy Efficiency**

- 1. The City requires awardees to continue working with Focus on Energy's New Construction Energy Design Assistance throughout the building design process. The City will incorporate commitments into the term sheet.**
  - a. Please attach the preliminary Whole Building Analysis and Results Report. If the Report is not yet available, please provide an update on the status and send ASAP no later than NOON on October 4, 2023.**

We received the attached Results Report back at the end of May. Since that time, there have been major changes to the building. Focus on Energy is working on updating our results. We will send as soon as possible but in no event later than Noon on October 4.

- b. What percentage of projected Energy Use Intensity (EUI) savings calculated over the baseline energy code is anticipated? (Note: 20% required.) To be determined. See answer above.**
- c. What is the highest feasible Bundle Level to which this project can commit? To be determined. See answer above.**

## **C. Sustainable Building Design Elements**

- 1. Please describe the Sustainable Building Design Elements and strategies that will be incorporated into the proposed project as referenced in the [AIA Framework for Design Excellence](#). Relevant elements and strategies include, but are not limited to**
  - a. Design for equitable communities**
  - b. Optimize energy use**
  - c. Protect and conserve water**
  - d. Optimize building space and material use**
  - e. Enhance indoor environmental quality (IEQ)**
  - f. Optimize operational and maintenance practices.**

**Design for Integration:** Neighborhood House Community Center (NHCC) integrates community programs, housing, and public engagement to foster unity within the Greenbush Neighborhood. Regular reviews ensure effective operation and maintenance, and community input is sought for seamless neighborhood integration.

**Design for Equitable Communities:** The NHCC design promotes equity through accessible spaces, interconnectivity, and inclusive program planning. Meeting and classroom spaces encourage diverse community interactions.

**Design for Ecosystems:** Reusing the existing site maximizes urban density, reducing the need for greenfield development. A green roof and bird-safe glass contribute to sustainability and nature integration.

**Design for Water:** Drought-resistant landscaping minimizes irrigation, while the green roof aids in water retention. Low-flow fixtures and water-efficient design are incorporated to conserve resources.

**Design for Economy:** A collaborative approach between the Alexander Company and NHCC allows for a financially viable project that meets both housing and community center needs. Unique challenges are addressed to optimize passive solar and building form.

**Design for Energy:** The project aims to exceed energy efficiency standards, with efficient mechanical systems, PV solar panels, and LED lighting. Construction focuses on reducing the carbon footprint through updated building codes and wood framing.

**Design for Well Being:** Strategies include access to outdoor spaces, native habitat preservation, community connectivity, and air quality improvement. Lighting studies are used to maximize natural light while minimizing glare.

**Design for Resources:** The project maximizes limited space by multifunctional design elements and prioritizes materials with recycled content and non-plastic products.

**Design for Change:** Anticipating future growth, the community center design accommodates expansion with a two-story structure, ensuring long-term adaptability.

**Design for Discovery:** Regular interdepartmental meetings within the Alexander Company allow for progress review, issue discussion, and tenant experience enhancement. Energy use analysis informs future energy goals.

Overall, the NHCC project embodies the AIA Framework's principles, fostering integration, equity, sustainability, and adaptability within the Greenbush Neighborhood.

- 2. Would it be possible for the community room off of the rooftop deck, or a portion of it, to double as a year-round indoor play space with supervision, but without reserving/renting out?**

**One of the advantages of this project is that there will be a community center on the first floor. Tenants in the residential portion of the project (including children) will be able to use the community center when open. This includes a new gymnasium. Therefore, we feel there will not be the need to add an indoor play space to the residential portion of the building.**

#### **D. Unit Mix**

- 1. The application lists different unit mix numbers of affordable units in two locations. Is the unit mix provided in the unit mix table the correct mix? I.e., Affordability commitment of 51/60 units at 60% AMI limits or under?**

The unit mix table for question 46 is correct. There are 51 affordable units at or below 60% CMI. 85% (51/60) of the total units in the project will be affordable.

**E. Supportive Housing Units/Supportive Housing Partnerships**

- 1. Housing Case Management and readiness during the three months prior to Certificate of Occupancy has been critical to ensuring that people experiencing homelessness have the support needed to complete the lease up process. Please describe plans detailed in the MOU with the Supportive Service Provider that will accommodate that critical lease up period?**

We do not have an official MOU at this time, but we are in the process of drafting one. The plan will be to schedule a meeting prior to the 120 day lease up period to start the discussions. The Salvation Army's Housing Services Director will be a part of the meeting to relay the information to the case managers who will then start to identify the clients that they are working with who would be a good fit for the units. The case manager will assist the tenant in starting to gather all needed information in preparation for lease up. Alexander Company and The Salvation Army will have monthly, bimonthly meetings throughout the lease up time to ensure all units are filled. The Salvation Army Case Manager will continue to work with the client during the wait time to ensure that clients' needs are being met.

**F. Scoring**

- 1. Access to Services & Amenities – This item seems low for this location. Is it not possible to increase, if not max out the points available in this category?**

After further review of WHEDA scoring, we had not included:

- in-unit internet access at no cost for residents (2 points)
- On site community room dedicated for residents (1 point)

Our total score should be the full 10 points for Access to Services & Amenities.

**G. Financing**

- 1. Describe the current/intended status of the Capital Campaign. What is the intended timeline? How will the project be impacted if the Capital Campaign is does not meet its goals?**

We (Neighborhood House) have been engaged in planning our capital campaign and meeting with a consultant since early spring 2023. Our capital campaign committee has been selected and we have conducted feasibility interviews. We are currently still in the planning phase with an intended kickoff of the quiet phase to cultivate major gifts in fall 2023. The quiet phase will run until groundbreaking on construction and then will move into the public phase. The entire

campaign will run from fall 2023 until we celebrate the opening of the new community center.  
If the capital campaign goal is not reached, the finishes of Neighborhood House will be affected.



# ENERGY DESIGN ASSISTANCE

# RESULTS REPORT

The Neighborhood House Apartments  
Madison, WI

May 25, 2023  
4023335

Prepared by



**focus on energy**<sup>®</sup>

Partnering with Wisconsin utilities

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in partnership with



your community energy company

Madison Gas & Electric



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## Process Overview

The program process follows a clear methodology of information gathering, collaboration, and analysis in an integrated setting of formal meetings. The project team and Focus on Energy work together to understand how the building will use energy and where cost-effective savings can be realized through design.



### Enrollment

- Complete the screening form online
- Connect with the appropriate rebate or incentive program



### Analysis

- Conference call and email(s) with an energy consultant
- Review scope of work and goals
- Confirm use and size of building
- Determine mechanical system options
- Create list of strategies
- Energy analysis based on building characteristics
- Implementation costs, payback periods, rebate estimates



### Results

- **Interactive energy goal setting**
- **Review baseline and strategies**
- **Review and revise bundles**
- **Complex strategies may be eligible for additional analysis**
- **Project team selects a bundle**



### Verification

- Receive a Bundle Requirements Document that provides a guideline to reach your goal and projected rebate
- On-site verification of select projects
- Energy consultant issues report



### Incentives

- The utility provider issues incentives for the strategies implemented in your project



## Design Assistance Incentives

### Incentives to Owner

A one-time incentive payment occurs following verification of strategies.

- Energy Design Assistance (EDA) incentives are based on how much energy is saved, compared to the baseline:
  - Owner Incentive: **\$0.075/kWh and \$0.87/Therm** saved
- Energy Design Assistance (EDA) incentives are limited to \$300,000 per project and \$400,000 per customer per calendar year for all Focus on Energy Incentives (prescriptive and custom).
- Energy Design Assistance (EDA) incentive cannot reduce the simple payback below 1 year.

### Focus on Energy Incentives to Design Team

The Energy Design Assistance offering also provides an incentive to the Design Team for the following activities.

- Participation at formal meetings
- Transfer of building architectural/engineering design and submittal information to Focus on Energy
- Development of applicable energy conservation strategies' incremental costs (incremental as compared to the baseline)

Please note that the incentive is not intended to cover actual system(s) design or re-design associated with energy conservation strategies.

The incentive amount is \$0.0075/kWh and \$0.035/Therm saved and will be processed at the time of Design Intent decision. The Design Team incentive is capped at \$10,000 per project.



## Building Summary

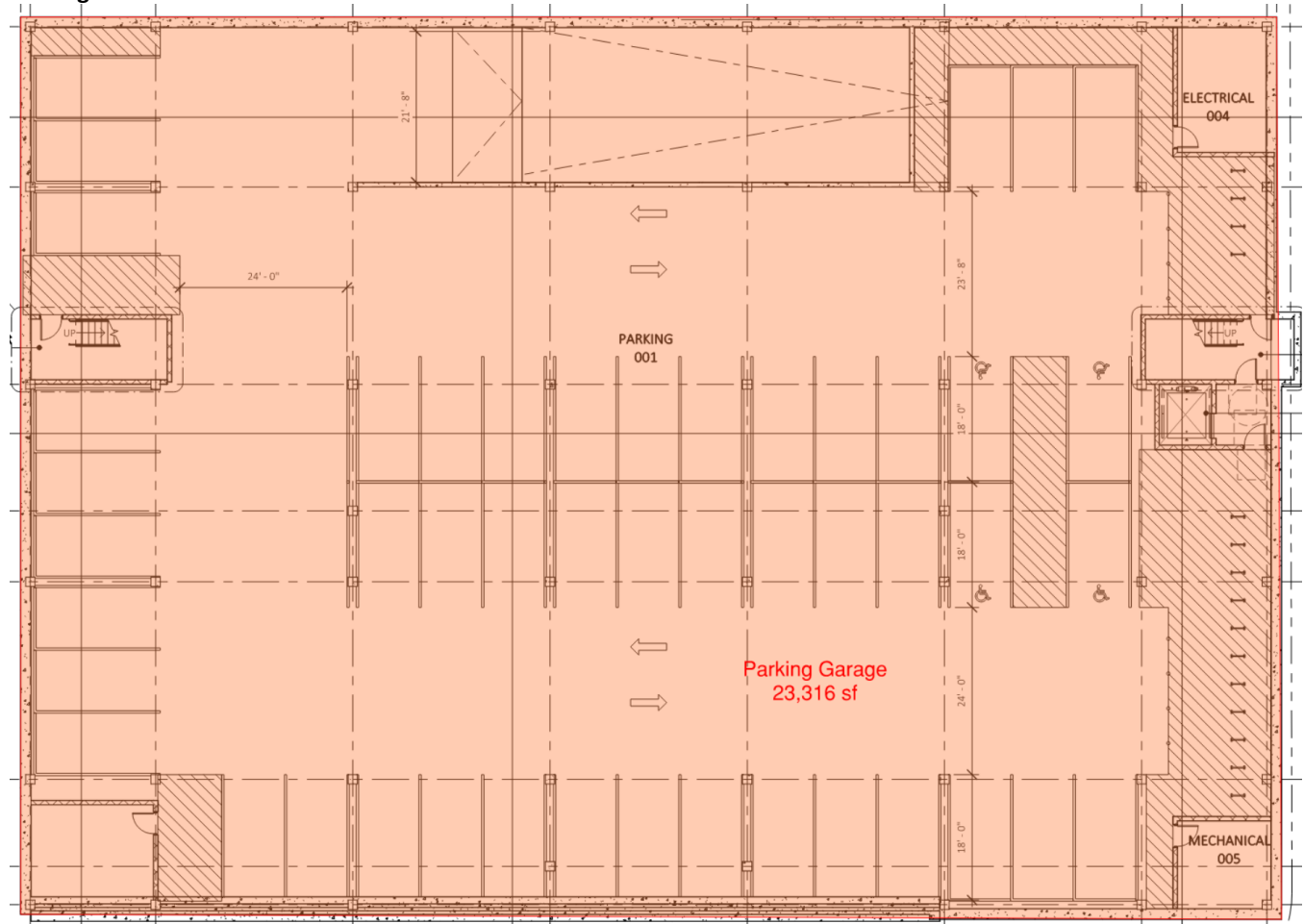
Building Summary		
Location	Madison, WI	
Narrative	Multi-family New Construction	
Space Asset Areas	Area	Number of Stories
Common Areas	1,658 ft <sup>2</sup>	1
Residential Entrance	1,819 ft <sup>2</sup>	1
Parking Garage	24,593 ft <sup>2</sup>	1
Gym	5,176 ft <sup>2</sup>	1
Community Center	12,437 ft <sup>2</sup>	1
Apartments (65 units)	53,930 ft <sup>2</sup>	4
Storage	2,798 ft <sup>2</sup>	1
Hallways	9,272 ft <sup>2</sup>	4
<b>Total</b>	<b>111,683 ft<sup>2</sup></b>	<b>6</b>
Exterior lighting	TBD	
Systems Summary		
Envelope	Exterior Walls: Assembly R-values start at code baseline Roof: Assembly R-values start at code baseline	
Glazing	Window frame type: fiberglass residential, metal for community center Start at code baseline performance	
Lighting	LEDs throughout Occ/Vac sensors? in common areas, not in hallways Daylight sensors	
Plug/Process	Assume typical per space type EnergyStar appliances	
Service Water Heating	Central Gas for Residential, Community Center TBD	
Elevators	(1) MRL traction	
Hours of Operation	Apartments: typical hours Community Center/Gym: TBD	
HVAC Scenario	<u>Apartments</u> : Packaged Gas-fired MagicPak, 95% eff. <u>Hallways, Storage, Entrance, Common Areas</u> : Gas/DX Furnace <u>Community Center/Gym</u> : Gas/DX Single Zone AHUs <u>Parking Garage</u> : Gas Unit Heaters	
Utilities		
Electric Utility	Madison Gas & Electric	
Gas Utility	Madison Gas & Electric	
Schedule		
Construction Documents Complete	05/01/2024	
Construction Start	09/01/2024	
Occupancy	09/30/2025	
Baseline Reference	ASHRAE 90.1-2013 Appendix G	
Other Notes		

# Building Plans

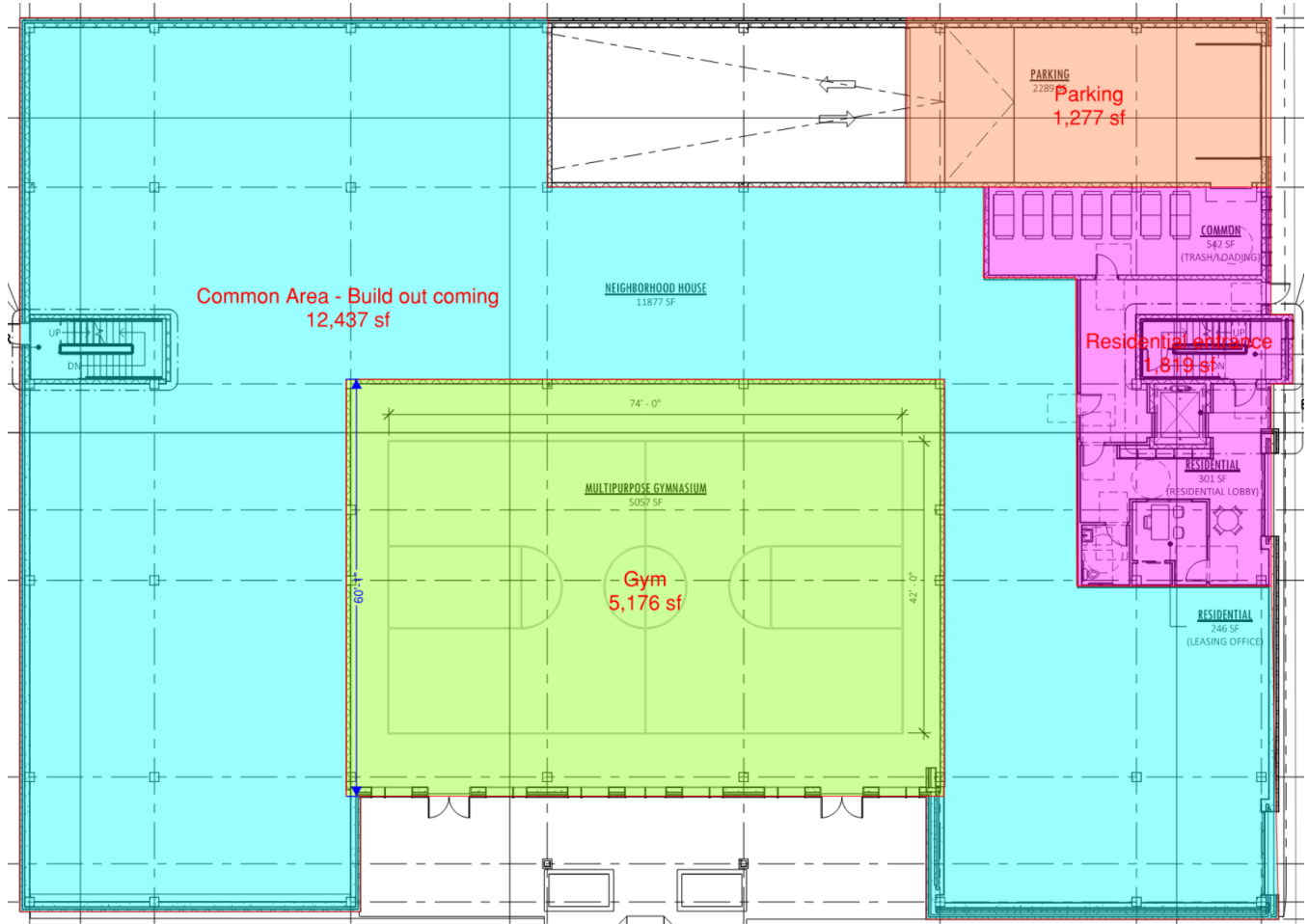


NORTH

## Parking Level

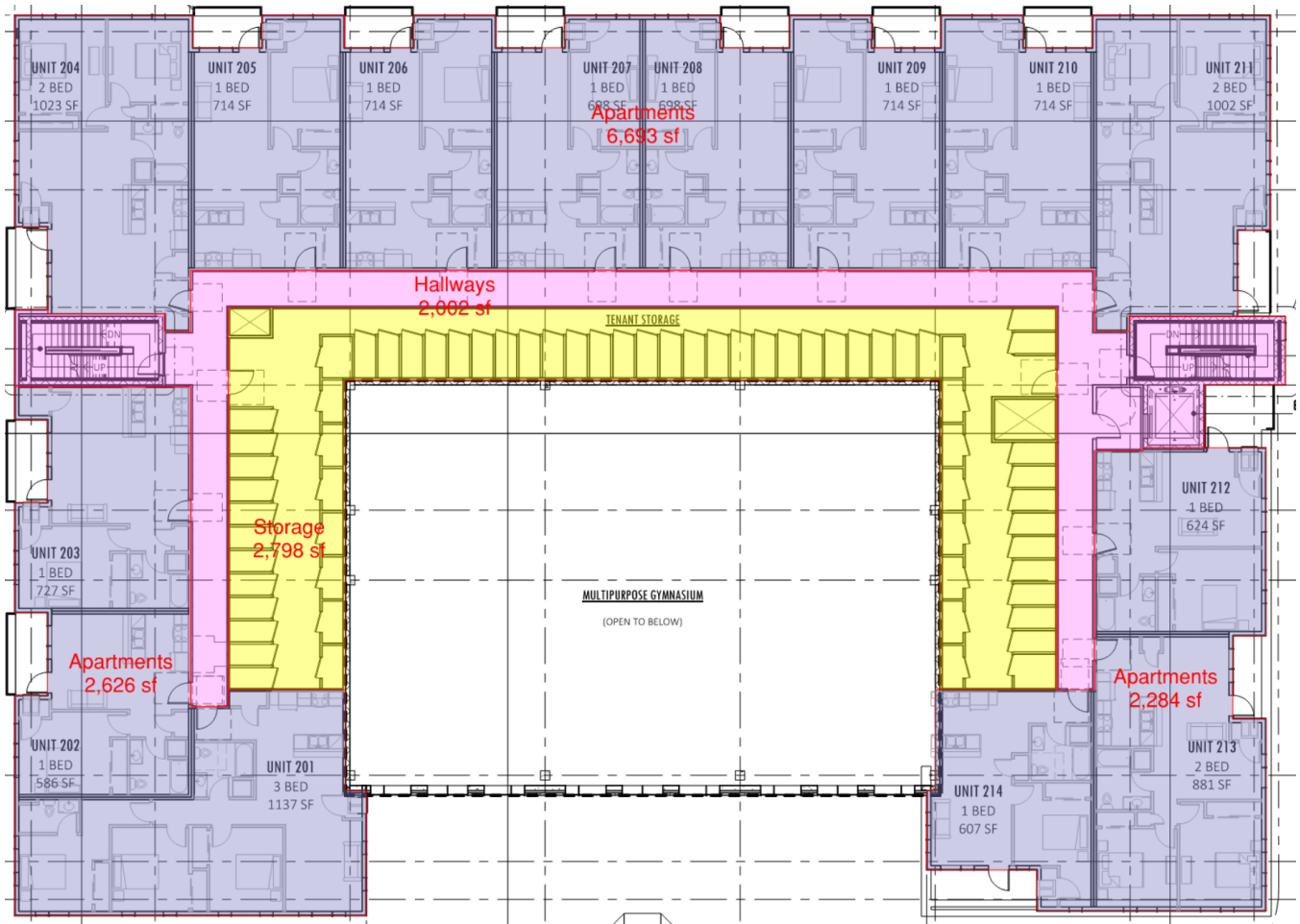


1<sup>st</sup> Floor

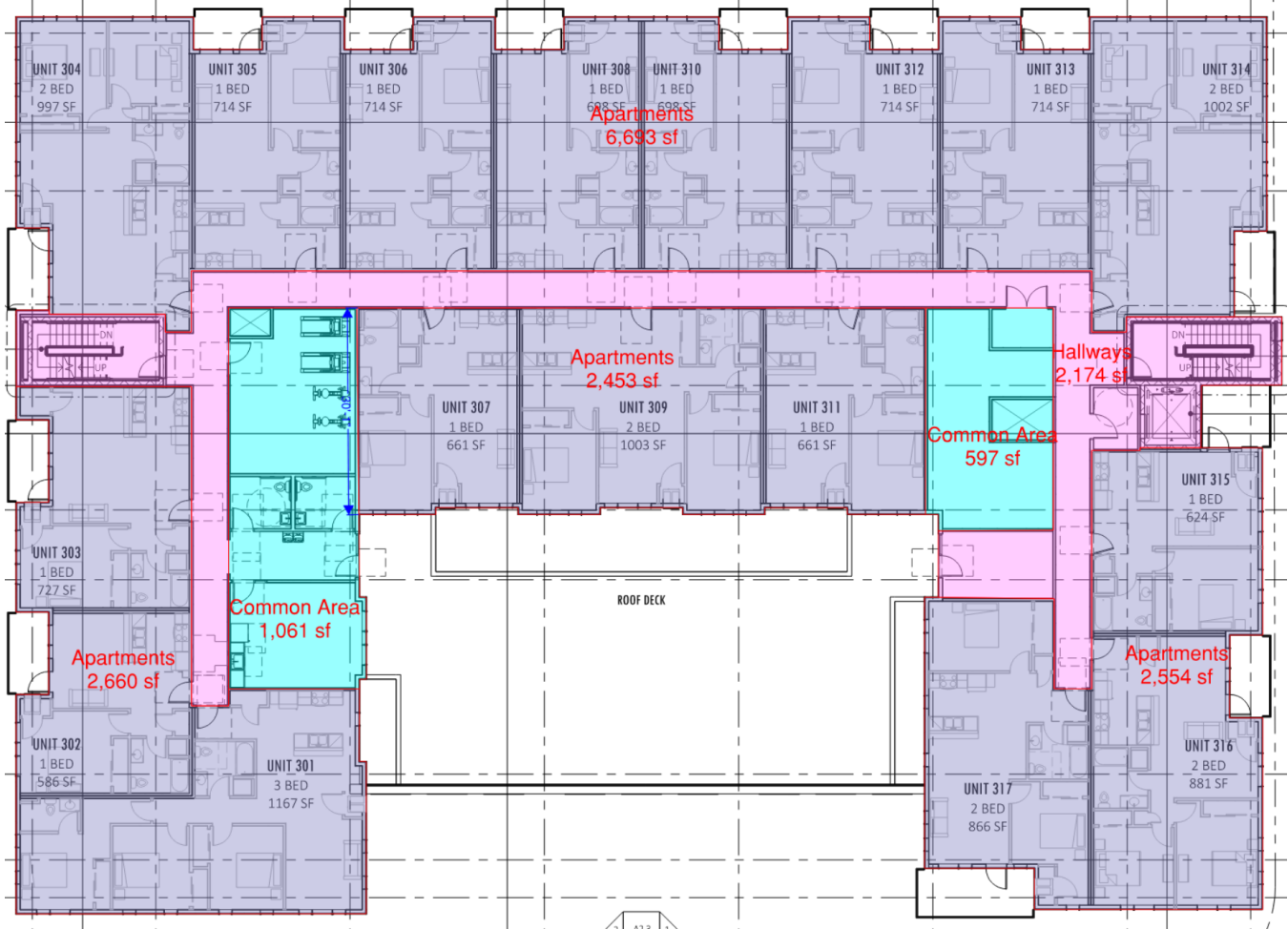




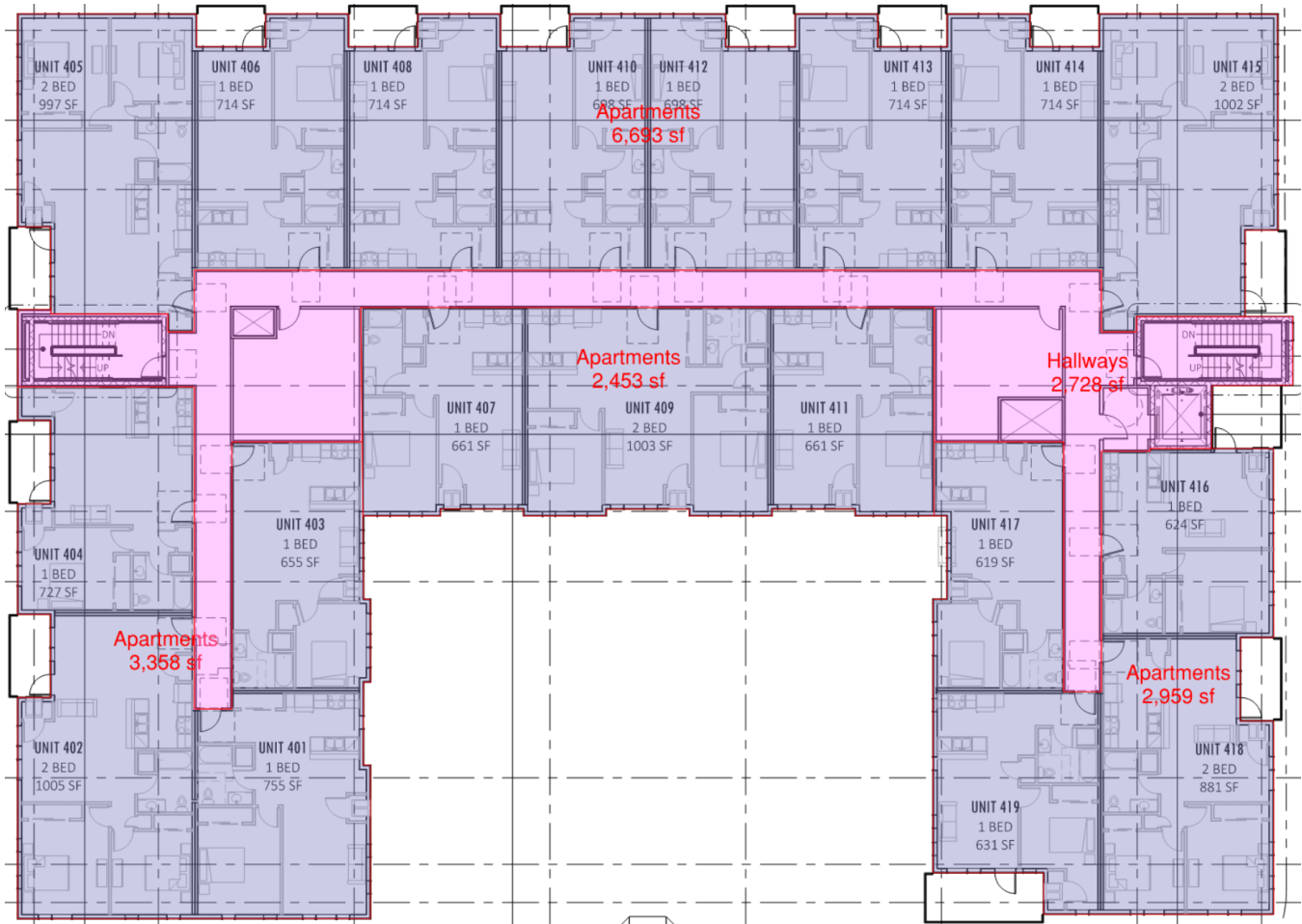
2<sup>nd</sup> Floor



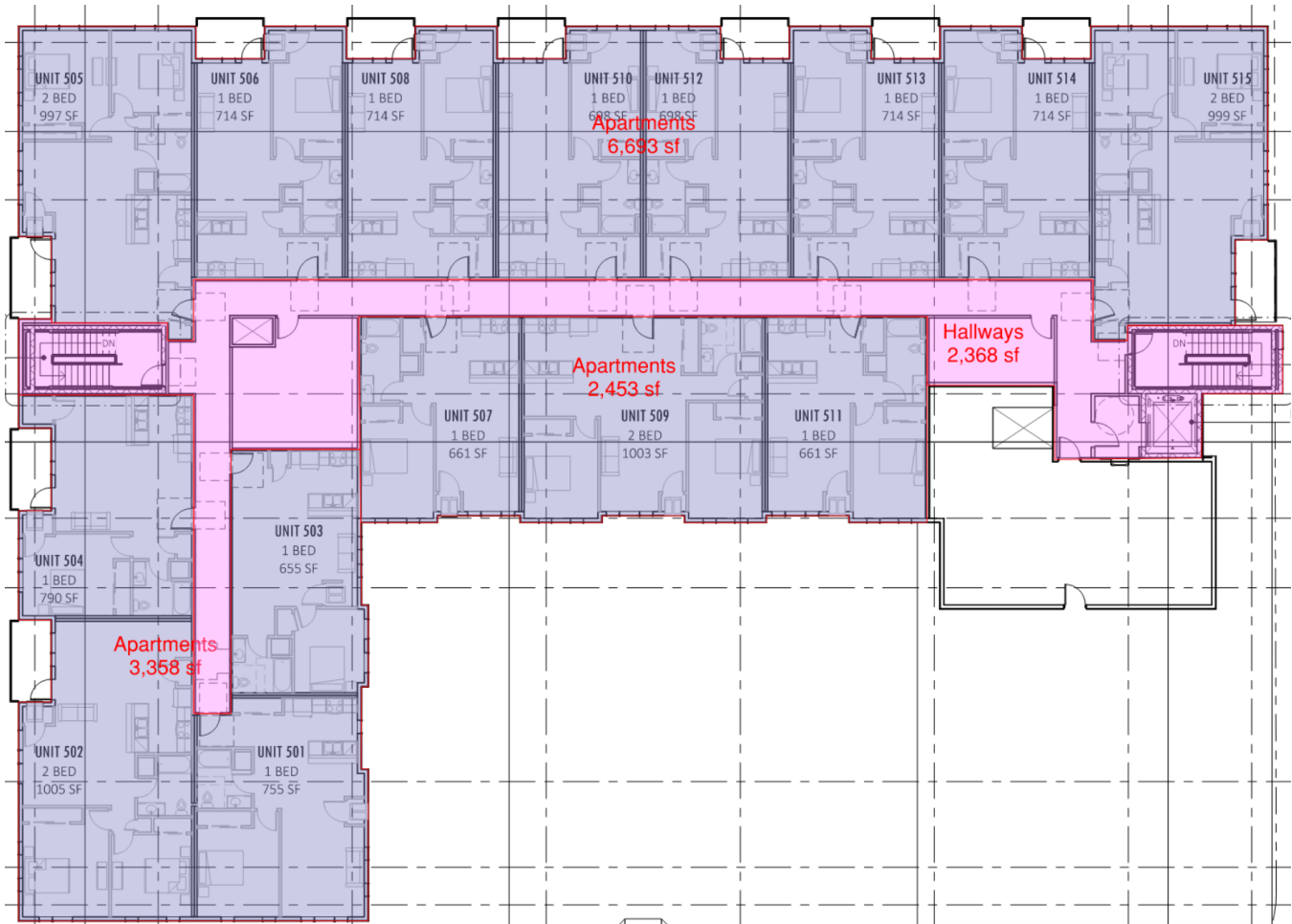
3<sup>rd</sup> Floor



4<sup>th</sup> Floor



5<sup>th</sup> Floor

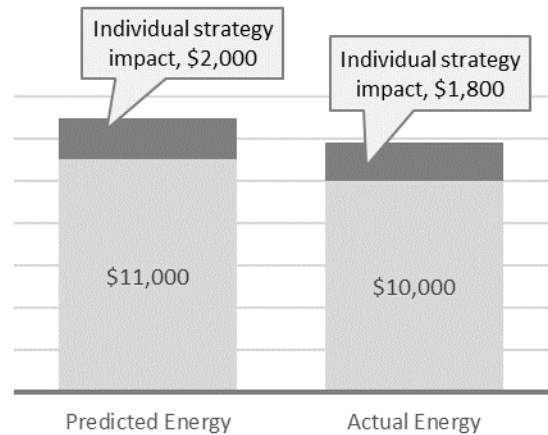


## Key Terms and Concepts

### Comparative Analysis

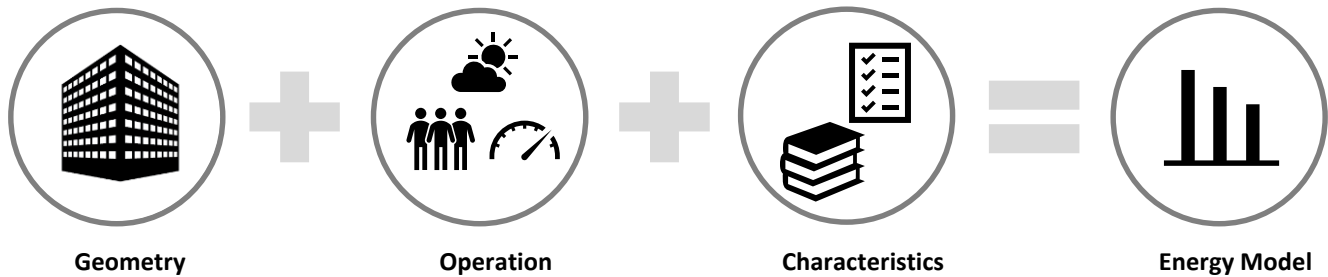
The building model provides insight into overall energy consumption; however, it is primarily designed to forecast savings. Like an MPG rating on a car, a comparative analysis can provide information on which options provide the most relative energy savings, but the actual operation and weather will have significant impacts on the overall energy consumption.

The predicted energy use of a building will be different than the actual energy use, due to assumptions and unknown characteristics. But the magnitude of an individual strategy impact will be similar in both cases and can be used to identify strategies with the greatest impact.



### Energy Model

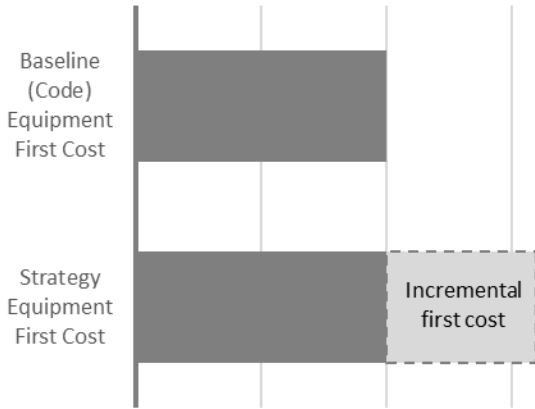
The energy model, using the simulation engine of DOE2, is used for comparative analysis of the building envelope, lighting, mechanical, and control options.



**Baseline Energy Model:** Used to establish a starting point for comparison. The **Geometry** is customized to the current project location, layout, use and size, and system. The **Operation** of weather, utility rates, plug loads, and expected occupancy are set based on the location, building type, and feedback from the project team. The **Characteristics** are defined by the program protocol (informed in large part by ASHRAE Standard 90.1) which prescribes minimum criteria values for envelope R-value, lighting power densities, HVAC equipment efficiencies and more.

**Strategy Energy Model:** Begins to incorporate aspects of the proposed design into the **Characteristics** portion of the energy model. The **Geometry** and **Operation** parts remain the same, but changes are made to the characteristics to see what the energy impacts are of improving things like the R-value in the wall or roof, reducing the lighting power in a particular space, or adding an airside total heat recovery system. The energy use of the Strategy Energy Model is subtracted from the energy use of the Baseline Energy Model to determine the amount of savings the strategy generates.

## Incremental Costs



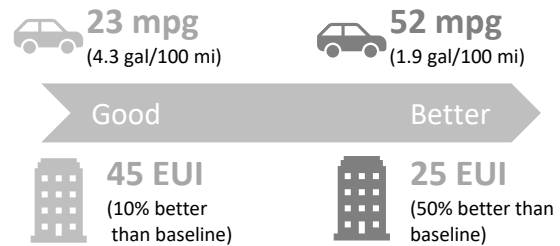
Incremental costs are intended to capture the additional cost, beyond the baseline case, that the project incurs by implementing the strategy. For example, an air-cooled chiller operating at Baseline conditions may cost \$100,000, while a more energy efficient air-cooled chiller costs \$160,000. \$60,000 would be the incremental cost associated with the improved air-cooled chiller.

As a part of this assistance Focus on Energy provides default incremental costs based on a variety of industry sources.

## Energy Use Intensity (EUI)

EUI refers to Energy Use Intensity and is often measured in BTU per square foot per year. Since EUI is normalized both on size and timeframe, it provides the team with a good comparison between projects and their baseline. A lower value of EUI is a lower energy usage and better performance.

$$EUI = \frac{\text{Electrical Energy} + \text{Gas Energy}}{\text{Building Area}} = \frac{\text{Annual kWh} \times 3.412 + \text{Annual therms} \times 100}{\text{Total gross square feet}} \text{ kBtu/sf/yr}$$



A more efficient option will use less energy under similar operation.

## Energy Conservation Bundles

Alternatives developed by the project team to maximize project goals which may include energy performance, simple payback, or long-term functionality.

Bundles are often configured and labeled in one of these ways:

	<b>Bundle 1</b>	<b>Bundle 2</b>	<b>Bundle 3</b>
<i>opt 1:</i>	Design	Design +	Max
<i>opt 2:</i>	VE	Design	Design +
<i>opt 3:</i>	Design	+Lighting alternate	+Envelope alternates +Lighting alternates
<i>opt 4:</i>	Design	+Alternate 1	+Alternate 2



This analysis should not be construed as correcting or overriding previous decisions or recommendations of the project team. The assistance is analytical in nature, using tools and methods not normally part of the customary design contract. The project team remains responsible for the implementation of strategies and final engineering of systems as well as for determining costs of various strategies.



## Energy Analysis – Baseline and HVAC Scenarios

The following graphs show the baseline and proposed mechanical system scenarios, described below, with Energy Use Intensity on the left and Energy Use Costs on the right.

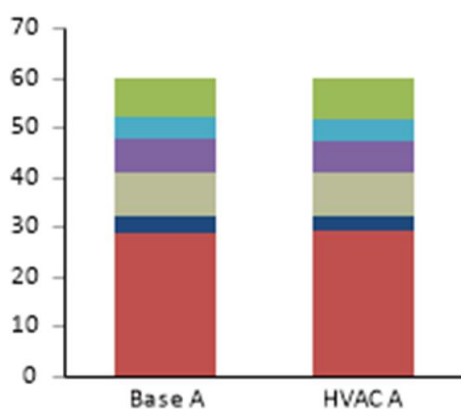
The utility baseline system consists of:

- Base scenario A: Apartments: PTAC w/ DX Cooling and Gas Boiler heating; All other spaces: Same as proposed HVAC scenario A

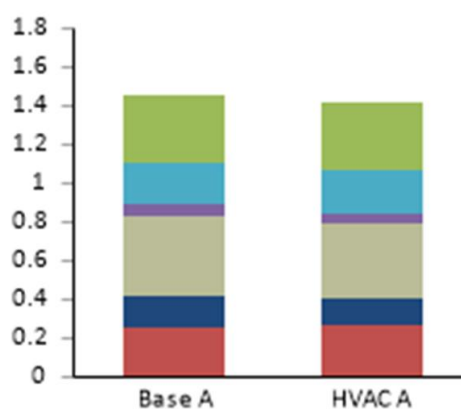
The proposed mechanical system, without any additional strategies, consists of:

- HVAC scenario A: Apartments: Packaged Gas-fired MagicPak w/ DX cooling; Hallways, Storage, Entrance, Common Areas: Gas Furnace w/ DX cooling; Community Center, Gym: Gas/DX Single Zone AHUs; Parking Garage: Gas Unit Heaters

Energy Use Intensity (kBtu/ft<sup>2</sup>/yr)



Energy Use Costs (\$/ft<sup>2</sup>)



	Base A	HVAC A
Heating	29	29.7
Cooling	3.5	3.1
Fans & Pumps	9	8.3
SWH	6.5	6.5
Refrigeration	0	0
Lighting	4.6	4.6
Equipment	7.4	7.4
<b>Total</b>	<b>60</b>	<b>59.5</b>

	Base A	HVAC A
Heating	0.27	0.28
Cooling	0.16	0.14
Fans & Pumps	0.41	0.38
SWH	0.06	0.06
Refrigeration	0	0
Lighting	0.21	0.21
Equipment	0.34	0.34
<b>Total</b>	<b>1.45</b>	<b>1.4</b>

### Key Points

- The proposed mechanical system HVAC A for the apartments is slightly more efficient than the Baseline A mechanical system
- The proposed mechanical system can be improved through energy conservation measures; these will be evaluated via the bundling exercises as part of this program.

## Energy Analysis – DRAFT Bundle Summary Results

Three bundles have been pre-populated with energy efficiency strategies to facilitate discussion during the results meeting using the following guidelines:

- Bundle 1 represents the current design
- Bundle 2 builds on Bundle 1 with additional strategies to improve EUI and lower energy costs
- Bundle 3 builds on Bundle 2 with additional strategies to improve EUI and lower energy costs

These preliminary strategy selections can be found in Appendix A. These selections are expected to be revised during the results meeting after discussion with the design team. Updated results will be published in the meeting minutes.

### Bundled Annual Savings

Bundle Description	Peak kW Savings	% Peak kW Savings	kWh Savings	% kWh Savings	Gas Savings (Therm)	% Gas Savings	Energy Cost Savings
Bundle 1	16	11	118,320	15	10,030	25	\$27,686
Bundle 2	46	31	266,471	33	13,502	34	\$53,886
Bundle 3	69	46	361,078	45	14,464	36	\$69,446

### Simple Payback with Incentive

Bundle Description	Energy Cost Savings	Incremental First Cost	Electric Incentive	Gas Incentive	Total Incentive	Payback in Years (after incentive)
Bundle 1	\$27,686	\$114,400	\$8,874	\$8,726	\$17,600	3.5
Bundle 2	\$53,886	\$244,226	\$19,985	\$11,747	\$31,732	3.9
Bundle 3	\$69,446	\$388,860	\$27,081	\$12,584	\$39,665	5.0

### Energy Use Intensity

Bundle Description	Energy Use Intensity (kBTU/sf/yr)
Bundle 1	47.4
Bundle 2	39.8
Bundle 3	36.0





## Verification

Verification is the next stage for the Design Assistance program. Verification seeks to assure that one of the bundles is implemented.

The process will be laid out in detail in the coming weeks, but it generally includes the following:

- Project team notifies Focus on Energy of the bundle selection.
- Focus on Energy sends a Bundle Requirements Document to the project team, tailored to the selected bundle strategies.
- Focus on Energy processes the design team incentive and sends payment to design team lead.
- Project team sends Construction Documents to Focus on Energy, electronic format preferred, two months prior to construction completion.
- Project team sends State of Wisconsin approved COMcheck submittal to Focus on Energy, two months prior to construction completion.
- Project team sends requested equipment submittals to Focus on Energy, two months prior to construction completion.
- Field verification of select projects for installed strategies once the building is completed and occupied\*.
- Report by Focus on Energy as to status of strategy implementation.
- Focus on Energy provides incentive payment.

\*Note that 10% of the Energy Design Assistance projects will be selected for on-site verification. The owner will be notified by Focus on Energy if the project has been selected upon construction completion. For projects not selected for on-site verification, the Construction Documents, State of Wisconsin approved COMcheck submission, and the equipment submittals will be used to verify the installed strategies.

If some of the chosen strategies are not implemented within the selected bundle, Focus on Energy may choose to adjust the incentive amount.

# Appendix A. Detailed Strategy Results

## Results

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
<b>Mechanical</b>									
<b>Gas/DX Furnace - Hallways, Storage, Entrance, Common Areas</b>									
Electronically commutated motor	1	7,793	-105	\$1,115	\$1,999	1.8		x	x
Variable speed fan at 67% minimum flow	4.3	31,932	-606	\$4,387	\$4,138	0.9		x	
Variable speed fan at 30% minimum flow	7.4	55,106	-1,144	\$7,477	\$4,138	0.6			x
Fan system power at 0.85 BHP/1000cfm	0.9	6,419	-83	\$920	\$958	1.0			
5% improved DX cooling efficiency	0.2	325	0	\$50	\$2,883	57.7		x	
10% improved DX cooling efficiency	0.4	618	0	\$94	\$5,766	61.3			x
20% improved DX cooling efficiency	0.7	1,120	0	\$173	\$11,532	66.7			
30% improved DX cooling efficiency	0.9	1,533	0	\$237	\$17,298	73.0			
82% efficient gas furnace	0	0	33	\$32	\$444	13.9	x		
90% efficient gas furnace	0	0	150	\$142	\$2,449	17.2		x	
95% efficient gas furnace	0	0	213	\$202	\$3,703	18.3			x
Occupancy sensor control of zone temperature for Common Areas	0	39	15	\$22	\$390	17.7			
Demand control ventilation for Common Areas	0	41	90	\$93	\$648	7.0		x	x
Occupancy sensor control of zone temperature for Residential Entrance	0	43	19	\$30	\$428	14.3			
Demand control ventilation for Residential Entrance	0	22	53	\$56	\$711	12.7			x
<b>Gas Unit Heaters - Garage</b>									
82% efficient gas furnace	0	0	379	\$355	\$703	2.0	x		
90% efficient gas furnace	0	0	1,723	\$1,608	\$3,875	2.4		x	
95% efficient gas furnace	0	0	2,449	\$2,283	\$5,857	2.6			x
CO sensor control of outdoor air	0	509	5,127	\$4,858	\$0	0.0	x	x	x
Direct-fired furnace	0	0	3,102	\$2,893	\$0	0.0			
<b>Gas/DX SZ AHUs - Community Center/Gym</b>									
Electronically commutated motor	0.3	1,660	-22	\$237	\$2,265	9.6		x	x
Variable speed fan at 67% minimum flow	11.4	48,412	-763	\$6,796	\$4,379	0.6		x	
Variable speed fan at 30% minimum flow	16.9	72,141	-1,126	\$10,134	\$4,379	0.4			x
Fan system power at 0.85 BHP/1000cfm	2.1	9,696	-118	\$1,395	\$1,085	0.8			
5% improved DX cooling efficiency	1.3	1,502	0	\$232	\$3,266	14.1		x	

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
10% improved DX cooling efficiency	2.4	2,864	0	\$443	\$6,532	14.7			x
20% improved DX cooling efficiency	4.5	5,243	0	\$813	\$13,064	16.1			
30% improved DX cooling efficiency	6.2	7,242	0	\$1,122	\$19,597	17.5			
High efficiency DX compressor part load performance	1.8	2,938	0	\$455	\$12,629	27.8		x	
Premium efficiency DX compressor part load performance	7.4	10,001	0	\$1,550	\$25,693	16.6			x
82% efficient gas furnace	0	0	118	\$112	\$503	4.5	x		
90% efficient gas furnace	0	0	536	\$500	\$2,775	5.5		x	
95% efficient gas furnace	0	0	762	\$711	\$4,195	5.9			x
Sensible heat recovery	0.4	111	1,470	\$1,387	\$12,441	9.0		x	x
Destratification fans in high bay spaces for Gym	0	-68	469	\$427	\$8,242	19.3			x
Occupancy sensor control of zone temperature for Gym	0.5	1,060	127	\$286	\$1,218	4.3			
Demand control ventilation for Gym	-0.2	1,838	2,536	\$2,648	\$2,022	0.8	x	x	x
Occupancy sensor control of zone temperature for Community Center	0.1	17	24	\$28	\$2,927	100+			
Demand control ventilation for Community Center	0	76	27	\$39	\$4,859	100+			
<b>Gas MagicPak - Apartments</b>									
Electronically commutated motor	1.4	14,352	-271	\$1,975	\$6,934	3.5		x	x
Fan system power at 0.27 W/cfm	1.7	12,699	-216	\$1,770	\$3,323	1.9			
5% improved DX cooling efficiency	1.4	3,414	0	\$527	\$10,001	19.0		x	
10% improved DX cooling efficiency	2.6	6,516	0	\$1,010	\$20,001	19.8			x
20% improved DX cooling efficiency	4.8	11,950	0	\$1,853	\$40,003	21.6			
30% improved DX cooling efficiency	6.7	16,546	0	\$2,566	\$60,004	23.4			
82% efficient gas furnace	0	0	279	\$262	\$1,541	5.9			
90% efficient gas furnace	0	0	1,272	\$1,189	\$8,497	7.1			
95% efficient gas furnace	0	0	1,807	\$1,688	\$12,843	7.6	x	x	x
Programmable thermostats for Apartments (65 units)	0	1,818	889	\$1,112	\$1,832	1.6	x		
Communicating thermostats for Apartments (65 units)	2.1	10,646	1,339	\$2,903	\$6,480	2.2		x	
Smart thermostats for Apartments (65 units)	3.3	14,851	1,350	\$3,564	\$11,552	3.2			x
<b>Architectural</b>									
<b>Facility</b>									
40% reduced air infiltration	0.7	622	1,305	\$1,315	\$10,802	8.2			
<b>Common Areas</b>									
Wall R-16	0	3	1	\$1	\$10	9.6		x	
Wall R-20	0	7	7	\$10	\$112	11.2			x
Wall R-24	0	11	11	\$15	\$214	14.3			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Glazing high solar gain w/ argon, metal frame	0	17	2	\$7	\$24	3.5		x	
Glazing medium solar gain, high transparency w/ argon, metal frame	0	58	-8	\$2	\$106	53.0			
Glazing medium solar gain w/ argon, metal frame	0	58	-8	\$2	\$65	32.5			
Glazing high solar gain, improved metal frame	0	12	6	\$10	\$163	16.3			x
Glazing medium solar gain, high transparency, improved metal frame	0	59	-5	\$5	\$245	49.0			
Glazing medium solar gain, improved metal frame	0	59	-5	\$5	\$204	40.8			
<b>Residential Entrance</b>									
Wall R-16	0	1	1	\$2	\$18	9.1		x	
Wall R-20	0	12	12	\$17	\$212	12.5			x
Wall R-24	0	17	19	\$23	\$405	17.6			
Glazing high solar gain, metal frame	0	35	-5	\$2	\$0	0.0			
Glazing high solar gain w/ argon, metal frame	0	47	4	\$13	\$46	3.5		x	
Glazing medium solar gain, high transparency w/ argon, metal frame	0.1	126	-16	\$4	\$202	50.4			
Glazing medium solar gain w/ argon, metal frame	0.1	111	-16	\$2	\$124	61.9			
Glazing high solar gain, improved metal frame	0	36	11	\$17	\$310	18.3			x
Glazing medium solar gain, high transparency, improved metal frame	0.1	125	-11	\$11	\$466	42.3			
Glazing medium solar gain, improved metal frame	0.1	109	-11	\$7	\$388	55.4			
<b>Gym</b>									
Wall R-16	0	6	4	\$8	\$47	5.9		x	
Wall R-20	0	33	40	\$41	\$552	13.5			x
Wall R-24	0	61	64	\$71	\$1,056	14.9			
Roof R-24	0	71	76	\$84	\$1,358	16.2		x	
Roof R-30	0.1	146	174	\$189	\$3,932	20.8			x
Roof R-36	0.1	202	240	\$257	\$6,505	25.3			
Roof R-40	0.1	233	273	\$291	\$8,221	28.3			
White roof	0.4	546	-49	\$41	\$498	12.1			x
Glazing high solar gain, metal frame	0	103	-10	\$6	\$0	0.0			
Glazing medium solar gain, high transparency, metal frame	0.2	384	-50	\$16	\$360	22.5			
Glazing medium solar gain, metal frame	0.2	337	-48	\$10	\$180	18.0			
Glazing high solar gain w/ argon, metal frame	0	145	15	\$38	\$107	2.8		x	
Glazing medium solar gain, high transparency w/ argon, metal frame	0.2	400	-20	\$46	\$469	10.2			
Glazing medium solar gain w/ argon, metal frame	0.2	351	-19	\$37	\$288	7.8			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Glazing high solar gain, improved metal frame	0	106	34	\$51	\$722	14.2			x
Glazing medium solar gain, high transparency, improved metal frame	0.2	401	-5	\$57	\$1,084	19.0			
Glazing medium solar gain, improved metal frame	0.2	352	-4	\$51	\$903	17.7			
<b>Community Center</b>									
Wall R-16	0	12	7	\$11	\$95	8.7		x	
Wall R-20	0	87	64	\$77	\$1,111	14.4			x
Wall R-24	0	122	102	\$115	\$2,126	18.5			
Glazing high solar gain, metal frame	0.1	353	-23	\$36	\$0	0.0			
Glazing medium solar gain, high transparency, metal frame	0.7	1,447	-123	\$113	\$1,719	15.2			
Glazing medium solar gain, metal frame	0.7	1,328	-119	\$96	\$857	8.9			
Glazing high solar gain w/ argon, metal frame	0.2	509	72	\$150	\$512	3.4		x	
Glazing medium solar gain, high transparency w/ argon, metal frame	0.6	1,515	-13	\$225	\$2,236	9.9			
Glazing medium solar gain w/ argon, metal frame	0.6	1,395	-10	\$210	\$1,374	6.5			
Glazing high solar gain, improved metal frame	0.1	370	134	\$182	\$3,443	18.9			x
Glazing medium solar gain, high transparency, improved metal frame	0.6	1,530	42	\$278	\$5,167	18.6			
Glazing medium solar gain, improved metal frame	0.6	1,408	45	\$260	\$4,305	16.6			
<b>Apartments (65 units)</b>									
Wall R-16	0	-13	75	\$66	\$793	12.0		x	
Wall R-20	0.2	-161	694	\$626	\$9,254	14.8			x
Wall R-24	0.3	-261	1,104	\$986	\$17,715	18.0			
Roof R-24	0.1	25	219	\$209	\$3,538	16.9		x	
Roof R-30	0.2	52	506	\$480	\$10,242	21.3			x
Roof R-36	0.2	57	697	\$660	\$16,946	25.7			
Roof R-40	0.3	61	791	\$747	\$21,415	28.7			
White roof	0.7	1,644	-154	\$112	\$498	4.4			x
Glazing high solar gain, non-metal frame	0.8	90	1,260	\$1,189	-\$28,281	0.0			
Glazing medium solar gain, high transparency, non-metal frame	2.4	6,879	646	\$1,670	-\$21,480	0.0			
Glazing medium solar gain, non-metal frame	2.4	6,879	646	\$1,670	-\$24,881	0.0			
Glazing high solar gain w/ argon, non-metal frame	1	54	1,764	\$1,653	-\$26,241	0.0		x	
Glazing medium solar gain, high transparency w/ argon, non-metal frame	2.4	6,128	1,235	\$2,102	-\$19,439	0.0			
Glazing medium solar gain w/ argon, non-metal frame	2.4	6,128	1,235	\$2,102	-\$22,840	0.0			x

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
<b>Hallways</b>									
Roof R-24	0	14	36	\$38	\$608	16.0		x	
Roof R-30	0	33	82	\$83	\$1,761	21.2			x
Roof R-36	0	45	113	\$113	\$2,913	25.8			
Roof R-40	0	51	127	\$127	\$3,682	29.0			
White roof	0.1	178	-24	\$8	\$498	62.3			x
<b>Lighting</b>									
<b>Common Areas</b>									
Dimming daylighting control, 25% of daylightable area	0	83	-1	\$11	\$39	3.5			
Dimming daylighting control, 50% of daylightable area	0.1	166	-2	\$23	\$78	3.4			
Dimming daylighting control, 75% of daylightable area	0.1	249	-3	\$39	\$117	3.0			
Dimming daylighting control, 100% of daylightable area	0.1	328	-4	\$48	\$155	3.2		x	x
Occupancy sensor controls, 25% of space	0	249	-4	\$36	\$78	2.2			
Occupancy sensor controls, 50% of space	0.1	499	-9	\$71	\$155	2.2			
Occupancy sensor controls, 75% of space	0.1	748	-13	\$104	\$233	2.2			
Occupancy sensor controls, 100% of space	0.1	998	-18	\$140	\$310	2.2		x	
Vacancy sensor controls, 25% of space	0	290	-5	\$45	\$78	1.7			
Vacancy sensor controls, 50% of space	0.1	582	-10	\$82	\$155	1.9			
Vacancy sensor controls, 75% of space	0.1	872	-16	\$123	\$233	1.9			
Vacancy sensor controls, 100% of space	0.2	1,164	-21	\$164	\$310	1.9			x
Lighting power in Common Areas reduced to 0.46 W/ft <sup>2</sup>	0.1	333	-6	\$46	\$111	2.4			
Lighting power in Common Areas reduced to 0.41 W/ft <sup>2</sup>	0.1	667	-11	\$95	\$221	2.3			
Lighting power in Common Areas reduced to 0.36 W/ft <sup>2</sup>	0.2	999	-17	\$143	\$325	2.3	x		
Lighting power in Common Areas reduced to 0.31 W/ft <sup>2</sup>	0.3	1,333	-23	\$189	\$422	2.2		x	
Lighting power in Common Areas reduced to 0.26 W/ft <sup>2</sup>	0.3	1,667	-29	\$234	\$511	2.2			x
High-end trim, 20% lighting power reduction	0.1	667	-11	\$95	\$98	1.0			
<b>Residential Entrance</b>									
Dimming daylighting control, 75% of daylightable area	0	124	-1	\$18	\$50	2.8			
Dimming daylighting control, 100% of daylightable area	0.1	310	-4	\$47	\$132	2.8		x	x
Occupancy sensor controls, 25% of space	0	304	-5	\$45	\$85	1.9			
Occupancy sensor controls, 50% of space	0.1	609	-10	\$89	\$170	1.9		x	
Occupancy sensor controls, 75% of space	0.1	908	-15	\$128	\$255	2.0			
Occupancy sensor controls, 100% of space	0.1	1,086	-18	\$154	\$340	2.2			x

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Vacancy sensor controls, 25% of space	0	352	-6	\$51	\$85	1.7			
Vacancy sensor controls, 50% of space	0.1	707	-12	\$99	\$170	1.7			
Vacancy sensor controls, 75% of space	0.1	1,041	-18	\$146	\$255	1.7			
Vacancy sensor controls, 100% of space	0.2	1,264	-21	\$178	\$340	1.9			
Lighting power in Residential Entrance reduced to 0.46 W/ft <sup>2</sup>	0.1	393	-6	\$54	\$121	2.2			
Lighting power in Residential Entrance reduced to 0.41 W/ft <sup>2</sup>	0.1	785	-13	\$109	\$243	2.2			
Lighting power in Residential Entrance reduced to 0.36 W/ft <sup>2</sup>	0.2	1,180	-20	\$168	\$357	2.1	x		
Lighting power in Residential Entrance reduced to 0.31 W/ft <sup>2</sup>	0.3	1,573	-27	\$221	\$463	2.1		x	
Lighting power in Residential Entrance reduced to 0.26 W/ft <sup>2</sup>	0.3	1,966	-33	\$274	\$561	2.0			x
High-end trim, 20% lighting power reduction	0.1	785	-13	\$109	\$108	1.0			
<b>Gym</b>									
Occupancy sensor controls, 25% of space	0.1	1,016	-20	\$141	\$242	1.7			
Occupancy sensor controls, 50% of space	0.3	2,035	-39	\$276	\$484	1.8		x	
Occupancy sensor controls, 75% of space	0.4	3,051	-59	\$419	\$727	1.7			
Occupancy sensor controls, 100% of space	0.6	4,062	-80	\$556	\$969	1.7			x
Vacancy sensor controls, 25% of space	0.2	1,233	-23	\$170	\$242	1.4			
Vacancy sensor controls, 50% of space	0.4	2,472	-47	\$342	\$484	1.4			
Vacancy sensor controls, 75% of space	0.5	3,702	-71	\$509	\$727	1.4			
Vacancy sensor controls, 100% of space	0.7	4,936	-95	\$677	\$969	1.4			
Lighting power in Gym reduced to 0.85 W/ft <sup>2</sup>	0.3	1,741	-31	\$240	\$346	1.4			
Lighting power in Gym reduced to 0.75 W/ft <sup>2</sup>	0.7	3,492	-64	\$482	\$691	1.4			
Lighting power in Gym reduced to 0.66 W/ft <sup>2</sup>	1	5,238	-95	\$723	\$1,015	1.4	x		
Lighting power in Gym reduced to 0.56 W/ft <sup>2</sup>	1.4	6,982	-127	\$965	\$1,316	1.4		x	
Lighting power in Gym reduced to 0.47 W/ft <sup>2</sup>	1.7	8,721	-161	\$1,203	\$1,596	1.3			x
Lighting power in Gym reduced to 0.38 W/ft <sup>2</sup>	2.1	10,465	-194	\$1,440	\$1,853	1.3			
High-end trim, 20% lighting power reduction	0.7	3,492	-64	\$482	\$306	0.6			
<b>Community Center</b>									
Dimming daylighting control, 100% of daylightable area	0.1	371	-3	\$53	\$127	2.4		x	x
Occupancy sensor controls, 75% of space	0.1	1,255	-7	\$190	\$472	2.5		x	
Occupancy sensor controls, 100% of space	0.4	2,510	-12	\$377	\$1,054	2.8			
Vacancy sensor controls, 75% of space	0.4	2,175	-10	\$327	\$472	1.4			x
Vacancy sensor controls, 100% of space	0.8	3,753	-17	\$568	\$1,054	1.9			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Lighting power in Community Center reduced to 0.74 W/ft <sup>2</sup>	1.1	2,618	-7	\$401	\$830	2.1			
Lighting power in Community Center reduced to 0.66 W/ft <sup>2</sup>	1.9	4,834	-15	\$734	\$1,661	2.3			
Lighting power in Community Center reduced to 0.57 W/ft <sup>2</sup>	2	6,816	-23	\$1,037	\$2,439	2.4	x		
Lighting power in Community Center reduced to 0.49 W/ft <sup>2</sup>	2.8	9,025	-31	\$1,371	\$3,163	2.3		x	
Lighting power in Community Center reduced to 0.41 W/ft <sup>2</sup>	3.5	11,239	-39	\$1,709	\$3,834	2.2			x
Lighting power in Community Center reduced to 0.33 W/ft <sup>2</sup>	4.3	13,442	-48	\$2,040	\$4,452	2.2			
High-end trim, 20% lighting power reduction	1.9	4,834	-15	\$734	\$735	1.0			
<b>Apartments (65 units)</b>									
Lighting power in Apartments (65 units) reduced to 0.96 W/ft <sup>2</sup>	0.3	5,577	-104	\$767	\$3,601	4.7			
Lighting power in Apartments (65 units) reduced to 0.86 W/ft <sup>2</sup>	0.7	11,129	-209	\$1,530	\$7,204	4.7			
Lighting power in Apartments (65 units) reduced to 0.75 W/ft <sup>2</sup>	1	16,695	-314	\$2,294	\$10,576	4.6	x		
Lighting power in Apartments (65 units) reduced to 0.64 W/ft <sup>2</sup>	1.4	22,249	-420	\$3,059	\$13,717	4.5		x	
Lighting power in Apartments (65 units) reduced to 0.54 W/ft <sup>2</sup>	1.7	27,806	-527	\$3,822	\$16,626	4.3			x
Lighting power in Apartments (65 units) reduced to 0.43 W/ft <sup>2</sup>	2	33,364	-635	\$4,582	\$19,303	4.2			
Lighting power in Apartments (65 units) reduced to 0.32 W/ft <sup>2</sup>	2.4	38,917	-743	\$5,340	\$21,749	4.1			
<b>Hallways</b>									
Occupancy sensor controls, 25% of space	0.4	1,666	-20	\$243	\$434	1.8			
Occupancy sensor controls, 50% of space	0.9	3,337	-40	\$482	\$868	1.8			x
Occupancy sensor controls, 75% of space	1.3	4,985	-61	\$720	\$1,301	1.8			
Occupancy sensor controls, 100% of space	1.4	6,000	-74	\$861	\$1,735	2.0			
Lighting power in Hallways reduced to 0.46 W/ft <sup>2</sup>	0.2	2,211	-26	\$320	\$619	1.9			
Lighting power in Hallways reduced to 0.41 W/ft <sup>2</sup>	0.4	4,430	-54	\$638	\$1,239	1.9			
Lighting power in Hallways reduced to 0.36 W/ft <sup>2</sup>	0.5	6,660	-83	\$958	\$1,818	1.9	x		
Lighting power in Hallways reduced to 0.31 W/ft <sup>2</sup>	0.7	8,901	-113	\$1,275	\$2,358	1.8		x	
Lighting power in Hallways reduced to 0.26 W/ft <sup>2</sup>	0.9	11,157	-146	\$1,597	\$2,858	1.8			x
High-end trim, 20% lighting power reduction	0.4	4,430	-54	\$638	\$548	0.9			



Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
<b>Parking Garage</b>									
Occupancy sensor controls, 50% of space	0.3	2,507	-29	\$364	\$921	2.5		x	
Occupancy sensor controls, 75% of space	0.7	5,641	-66	\$813	\$2,071	2.5			x
Occupancy sensor controls, 100% of space	1	8,774	-103	\$1,268	\$3,222	2.5			
Lighting power in Parking Garage reduced to 0.19 W/ft <sup>2</sup>	0.2	3,205	-37	\$463	\$1,642	3.5			
Lighting power in Parking Garage reduced to 0.17 W/ft <sup>2</sup>	0.4	6,411	-75	\$925	\$3,285	3.6			
Lighting power in Parking Garage reduced to 0.15 W/ft <sup>2</sup>	0.6	9,616	-112	\$1,386	\$4,823	3.5	x		
Lighting power in Parking Garage reduced to 0.13 W/ft <sup>2</sup>	0.9	12,822	-152	\$1,846	\$6,255	3.4		x	
Lighting power in Parking Garage reduced to 0.11 W/ft <sup>2</sup>	1.1	16,027	-194	\$2,305	\$7,582	3.3			x
Lighting power in Parking Garage reduced to 0.08 W/ft <sup>2</sup>	1.3	19,233	-236	\$2,760	\$8,802	3.2			
High-end trim, 20% lighting power reduction	0.4	6,411	-75	\$925	\$1,453	1.6			
<b>Storage</b>									
Occupancy sensor controls, 75% of space	0	192	-3	\$28	\$106	3.8			
Occupancy sensor controls, 100% of space	0.1	385	-7	\$54	\$237	4.4		x	
Vacancy sensor controls, 75% of space	0.1	338	-6	\$49	\$106	2.2			
Vacancy sensor controls, 100% of space	0.1	575	-10	\$80	\$237	3.0			x
Lighting power in Storage reduced to 0.74 W/ft <sup>2</sup>	0.1	350	-6	\$49	\$187	3.8			
Lighting power in Storage reduced to 0.66 W/ft <sup>2</sup>	0.1	690	-13	\$99	\$374	3.8			
Lighting power in Storage reduced to 0.57 W/ft <sup>2</sup>	0.2	1,037	-19	\$144	\$549	3.8	x		
Lighting power in Storage reduced to 0.49 W/ft <sup>2</sup>	0.2	1,379	-25	\$194	\$712	3.7		x	
Lighting power in Storage reduced to 0.41 W/ft <sup>2</sup>	0.3	1,729	-32	\$239	\$863	3.6			x
Lighting power in Storage reduced to 0.33 W/ft <sup>2</sup>	0.3	2,082	-39	\$290	\$1,001	3.5			
High-end trim, 20% lighting power reduction	0.1	690	-13	\$99	\$165	1.7			
<b>Plug/Process</b>									
<b>Facility</b>									
Traction elevator, gearless	0.2	1,026	0	\$161	\$12,113	75.2			
Traction elevator, machine roomless	0.5	2,153	0	\$334	\$21,197	63.5	x	x	x
Traction elevator, regenerative	0.7	2,892	0	\$448	\$42,394	94.6			
Elevator permanent magnet motor	0.1	363	0	\$55	\$15,141	100+			
<b>Apartments (65 units)</b>									
Clothes washers, ENERGY STAR minimum certification efficiency	2.3	17,101	-188	\$2,474	\$12,857	5.2	x		
Clothes washers, ENERGY STAR high efficiency	2.7	20,058	-227	\$2,899	\$32,143	11.1		x	

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	Bundle 1	Bundle 2	Bundle 3
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Clothes washers, ENERGY STAR premium efficiency	3.4	25,288	-293	\$3,647	\$51,428	14.1			x
Clothes dryers, ENERGY STAR minimum certification efficiency	0.3	2,356	-31	\$339	\$19,286	56.9	x		
Clothes dryers, ENERGY STAR high efficiency	0.8	6,107	-81	\$872	\$45,000	51.6		x	
Clothes dryers, ENERGY STAR premium efficiency	1.7	13,014	-173	\$1,856	\$48,214	26.0			x
Dishwashers, ENERGY STAR premium efficiency	0.2	1,570	149	\$384	\$28,285	73.7			x
Refrigerators, ENERGY STAR minimum certification efficiency	0.6	4,798	-63	\$683	\$19,286	28.2	x		
Refrigerators, ENERGY STAR high efficiency	1	7,180	-95	\$1,024	\$38,571	37.7		x	
Refrigerators, ENERGY STAR premium efficiency	1.3	9,564	-127	\$1,366	\$45,000	32.9			x
Bathroom exhaust fan, ENERGY STAR minimum certification efficiency	0.3	2,240	-30	\$322	\$0	0.0		x	
Bathroom exhaust fan, ENERGY STAR premium efficiency	0.5	3,870	-51	\$552	\$0	0.0			x
<b>Service Water Heating</b>									
<b>Facility</b>									
82% SWH efficiency	0	0	177	\$166	\$270	1.6			
90% SWH efficiency	0	0	913	\$855	\$1,524	1.8	x		
95% SWH efficiency	0	0	1,247	\$1,163	\$2,308	2.0		x	x
Gas fired on-demand SWH	0	0	591	\$553	\$39,708	71.8			
<b>Apartments (65 units)</b>									
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	724	\$678	\$651	1.0		x	
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	1,085	\$1,012	\$1,389	1.4			
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	1,447	\$1,350	\$1,931	1.4			x

## Appendix B. Key Model Inputs

### Core Definition

Space Asset Area	Type	Area (ft <sup>2</sup> )	Floors	Units	Arrangement	Flr/Flr Height
Common Areas	Common Areas - Multifamily	1,658	1	n/a	Stacked	12.0
Residential Entrance	Common Areas - Multifamily	1,819	1	n/a	Adjacent / Grade	12.0
Parking Garage	Garage - Enclosed	24,593	1	n/a	Adjacent / Grade	10.0
Gym	Gymnasium	5,176	1	n/a	Adjacent / Grade	20.0
Community Center	Office	12,437	1	n/a	Stacked	12.0
Apartments (65 units)	Apartments - Med/High Rise	53,930	4	65	Stacked	12.0
Storage	Office	2,798	1	n/a	Adjacent / Grade	12.0
Hallways	Common Areas - Multifamily	9,272	4	n/a	Adjacent / Grade	12.0

## Schedules

Space Asset Area	People Density (ft <sup>2</sup> /person)	Daily Use							Hours per Day			Core Use Start Time	Partial Day Max Use Fraction	Applicable Months
		S	M	T	W	T	F	S	Full	Partial	Fans			
<u>Common Areas</u>	100.0	●	●	●	●	●	●	●	7	3	18	11 am	0.5	12
<u>Residential Entrance</u>	100.0	●	●	●	●	●	●	●	14	3	18	7 am	0.5	12
<u>Parking Garage</u>	n/a	●	●	●	●	●	●	●	14	8	24	6 pm	0.5	12
<u>Gym</u>	33.0	●	●	●	●	●	●	●	7	3	18	11 am	0.5	12
<u>Community Center</u>	200.0	●	●	●	●	●	●	●	9	4	16	8 am	0.25	12
<u>Apartments (65 units)</u>	380.0	●	●	●	●	●	●	●	14	7	24	6 pm	0.5	12
<u>Storage</u>	n/a	●	●	●	●	●	●	●	9	4	16	8 am	0.25	12
<u>Hallways</u>	n/a	●	●	●	●	●	●	●	14	3	24	6 pm	0.5	12

- Full Use
- Partial Use
- No Use

## Thermostat

Space Asset Area	Heating Set Point (°F)		Cooling Set Point (°F)	
	Occupied	Unoccupied	Occupied	Unoccupied
<u>Common Areas</u>	70	60	75	80
<u>Residential Entrance</u>	70	60	75	80
<u>Parking Garage</u>	50	50	100	100
<u>Gym</u>	70	60	75	85
<u>Community Center</u>	70	60	75	80
<u>Apartments (65 units)</u>	70	70	75	75
<u>Storage</u>	60	60	80	80
<u>Hallways</u>	70	70	75	75

## Ventilation Requirements

Space Asset Area	Outside Air Per Person (ft <sup>3</sup> /min/person)	Outside Air Per Area (ft <sup>3</sup> /min/ft <sup>2</sup> )	Exhaust Flow Per Area (ft <sup>3</sup> /min/ft <sup>2</sup> )	Air Changes (ACH)	
				Occupied	Unoccupied
<u>Common Areas</u>	5.0	0.06	0.00	n/a	n/a
<u>Residential Entrance</u>	5.0	0.06	0.00	n/a	n/a
<u>Parking Garage</u>	0.0	0.00	0.75	n/a	n/a
<u>Gym</u>	20.0	0.18	0.00	n/a	n/a
<u>Community Center</u>	5.0	0.06	0.00	n/a	n/a
<u>Apartments (65 units)</u>	8.0	0.03	0.07	n/a	n/a
<u>Storage</u>	0.0	0.06	0.00	n/a	n/a
<u>Hallways</u>	0.0	0.06	0.00	n/a	n/a

## Other Loads

Space Asset Area	Equipment Power Density (W/ft <sup>2</sup> )	Process Load		Service Hot Water	
		Load (Btu/hr/ft <sup>2</sup> )	Fuel Source	Consumption Flow/person (gal/day/person)	Consumption Miscellaneous Flow (gal/day)
<u>Common Areas</u>	0.50	0.00	Gas	0.3	0.0
<u>Residential Entrance</u>	0.50	0.00	Gas	0.3	0.0
<u>Parking Garage</u>	0.00	0.00	Gas	0.0	0.0
<u>Gym</u>	0.50	0.00	Gas	0.3	0.0
<u>Community Center</u>	0.75	0.00	Gas	1.0	0.0
<u>Apartments (65 units)</u>	0.62	0.00	Gas	18.0	0.0
<u>Storage</u>	0.15	0.00	Gas	0.0	0.0
<u>Hallways</u>	0.15	0.00	Gas	0.0	0.0

**Utility Rates**

<b>Fuel</b>	<b>Utility</b>	<b>Rate</b>
Electric	Madison Gas & Electric	Average rate: \$0.1550 per kWh
Gas	Madison Gas & Electric	Average rate: \$0.93 per therm

## Appendix C. Glazing Property Details

The following glazing strategy properties are shown here for reference. All strategies may not be shown in this report.

Frame	Glazing	Unit U-value	COG U-value*	SHGC	VT
<b>Metal frame</b>					
	high solar gain	0.42	0.30	0.38	0.70
	medium solar gain, high transparency	0.42	0.29	0.29	0.62
	medium solar gain	0.42	0.30	0.29	0.39
	low solar gain	0.42	0.30	0.19	0.20
	high solar gain w/ argon	0.38	0.25	0.37	0.70
	medium solar gain w/ argon, high transparency	0.38	0.25	0.29	0.62
	medium solar gain w/ argon	0.38	0.25	0.29	0.39
	low solar gain w/ argon	0.38	0.25	0.19	0.20
<b>Improved metal frame**</b>					
	high solar gain	0.36	0.30	0.38	0.70
	medium solar gain, high transparency	0.36	0.29	0.29	0.62
	medium solar gain	0.36	0.30	0.29	0.39
	low solar gain	0.36	0.30	0.19	0.20
<b>Non-metal frame</b>					
	high solar gain	0.32	0.30	0.38	0.70
	medium solar gain, high transparency	0.32	0.29	0.29	0.62
	medium solar gain	0.32	0.30	0.29	0.39
	low solar gain	0.32	0.30	0.19	0.20
	high solar gain w/ argon	0.28	0.25	0.37	0.70
	medium solar gain w/ argon, high transparency	0.28	0.25	0.29	0.62
	medium solar gain w/ argon	0.28	0.25	0.29	0.39
	low solar gain w/ argon	0.28	0.25	0.19	0.20
<b>Triple pane metal frame</b>					
	high solar gain triple pane	0.29	0.16	0.33	0.60
	medium solar gain triple pane, high transparency	0.29	0.16	0.25	0.53
	medium solar gain triple pane	0.29	0.16	0.24	0.34
	low solar gain triple pane	0.29	0.16	0.14	0.18
	high solar gain triple pane w/ argon	0.26	0.13	0.32	0.60
	medium solar gain triple pane w/ argon, high transparency	0.26	0.13	0.25	0.53
	medium solar gain triple pane w/ argon	0.26	0.13	0.24	0.34
	low solar gain triple pane w/ argon	0.26	0.13	0.14	0.18
<b>Triple pane non-metal frame</b>					
	high solar gain triple pane	0.19	0.16	0.33	0.60
	medium solar gain triple pane, high transparency	0.19	0.16	0.25	0.53
	medium solar gain triple pane	0.19	0.16	0.24	0.34
	low solar gain triple pane	0.19	0.16	0.14	0.18
	high solar gain triple pane w/ argon	0.16	0.13	0.32	0.60
	medium solar gain triple pane w/ argon, high transparency	0.16	0.13	0.25	0.53
	medium solar gain triple pane w/ argon	0.16	0.13	0.24	0.34
	low solar gain triple pane w/ argon	0.16	0.13	0.14	0.18

\* COG U-value shown for reference only. Unit U-value will be used for verification. It includes the impacts of the frame design in addition to the COG-U value of the selected glazing.

\*\* Improved metal frame values are typically achieved by increasing the thermal break from 3/8" to 3/4"

## Appendix D. Project Participants

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