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

APPLICANT INFORMATION

Proposal Title:	Merchant Place Apartments		
Amount of Funds Requested:	$3,250,000	Type of Project:	☒ New Construction ☐ Acquisition/Rehab
Name of Applicant:	Northpointe Development II Corporation		
Mailing Address:	230 Ohio Street STE 200, Oshkosh WI 54902		
Telephone:	608-334-5665	Fax:	
Admin Contact:	Sean O'Brien	Email Address:	sean@northpointedev.com
Project Contact:	Sean O'Brien	Email Address:	sean@northpointedev.com
Financial Contact:	Sean O'Brien	Email Address:	sean@northpointedev.com
Website:	Northpointedev.com		
Legal Status of Maj. Owner:	☒ For-profit ☐ Non-profit	LIHTC Application:	☐ 4% only ☒ 4+4% ☐ 9%
HOME-ARP Set-Aside:	☐ Yes ☒ No		
Anticipated WHEDA Set-Aside:	☒ General ☐ Preservation ☐ Non-Profit ☐ Supportive Housing		
Federal EIN:	85-1243046	SAM/ UEI #:*	JUGXJNKZB987

* 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: Sean O'Brien

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

Date: 08/14/2023

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.

Northpointe Development and Selassie Development are proposing to construct the Merchant Place Apartments, a newly constructed mixed-use 124 unit LIHTC multifamily development with a Community Service Facility located on the west side of the City of Madison, Wisconsin. The development will consist of the new construction of 1, four-story elevatored building containing 14 Studios, 64, one bedroom/one bathroom units, 20, two bedroom/two bathroom units, and 26, three bedroom/two bathroom units for a total of 124 rental units targeting residents of all ages. The Developer proposes to set aside all of the units for residents earning 30, 50, 60 or 80 percent or less of the Dane County AMI using the LIHTC Program targeting residents of all ages. The subject development site is located on the west side of the City of Madison, Wisconsin, More specifically, the site is located at 6706-6714 Odana Road which is heavely traveled road in a retail corridor of Madison..

The project will be built to Wisconsin Green Built Gold Standards and will also receive and Energy Star New Construction/ EPA Indoor Air Plus Certifications. We are planning to have a 135 KW PV Solar System on the roof of the building to eliminate approximatley 90% of the buildings common area electrical usage. We have already met with Focus on Energy and their Design Assistance program and selected Bundle 3 as the target bundle. The project will have high quality materials including LVT flooring and solid surface countertops.

The project is located in a Qualified Cenus Tract and we workig with Wayforward (formally Middleton Outreach Ministry) to occuppy 1000 sq/ft of commerical space at $1 per year. Wayforward plans to use the space as offices for Case Management Services as well as a partial food pantry. Refridgerators and other equipment will be provided to allow Wayforward to hand out food bags and other items to families in need. Also, Wayforward views this space as a great opportunity to bring Case Management services closer to the residents they serve in other surrounding affordable housing properties.

The proposal meets a significant number of priorities identified by the City including:
New Development in areas of the city with strong connections. Our site is very walkable to a significant amount of employment opportunities, schools, public transportation, grocery, park, etc. The site is located on a major thoroughfare and is within 1/4 mile from a proposed BRT bus stop location. The site is part of the Odana Area Plan and is targeted as a future growth area which implements goals in the City's Comprehensive plan. Over 20% of the units will be set aside at 30% CMI and 20% of the affordable units will be three-bedrooms. The property will contain an indoor and outdoor play space and Northpointe will work with a local support service provider (Wayforward) to house homeless and formerly homeless individuals and coordinate or provide a level of services that meet the tenant's needs. The units will not allow smoking and will provide internet at no cost to the residents.

The project will be rent restricted in perpetuity as we plan to have an non-ending LURA with the City of Madison.

Lastly, we plan to work with the BCycle program to install Ebike Stations at the property. Tenants will have access to memberships at no cost.

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: 124
Total number affordable of units (<60% CMI): 90 Total % affordable of units (<60% CMI): 73%
Total amount of AHF requested per affordable unit: 36,111
Number of units supported by Section 8 project-based vouchers, if known: 0 PBV CMI level: 0
Length of Period of Affordability Commitment (min. 40 years): Perpetuity 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?

1/2 long-term deferred note waiving the shared appreciation. 1/2 cash flow promissory note.

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.

Northpointe's Prinicpals have significant experience in affordable housing policy and successfully sitting developments. Our first project in Madison, Uno Terrace, will open at the end of August and will likley be full soon after opening.

Northpointe's newest principal, Sean O'Brien, spent 14 years working at WHEDA where he ran the Commercial Lending Department. He was responsible for creating and implementing the State's affordable housing policy and operating the tax credit program. In addition to Mr. O'Brien's experiences at WHEDA he has been a local resident of the city for 40 years, knows the history, and has kept in touch while the city has grown and changed. The City of Madison has the most proactive approach to the tax credit program of any city in the State and has been very successfully in obtaining resources, surpassing a recent 5 year goal to add 1000 units of affordable housing. I believe this is because they understand their own needs as a city and how best to leverage their resources to obtain state and federal housing resources to meet their goals. Selassie Development President, Sam Haile, has been a Madison Area resident for the past 40 years as well and has extensive experience in community networking and real estate markets to help bring more voices to the table for design and inclusion.

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

Northpointe ordeded a market study for the tax credit appliciation last year which showed a significant demand for the housing units, including a capture rate of 1.8%. All of the units will be rent restricted and affordable as the need for affordable housing in Madison is significant. 73% of the units will be affrodable to low, very-low income and extremely low income households. 20.9% of the units will be 3-bedrooms for large families. 20% of units will be targeted towards households, including veterans, that are in need of supportive services. Currenlty there are over 600 individuals and over 100 families on the County's housing priorty list.

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 project will service Homeless, Vets, Vets experiencing homelessness, individuals with disablilties. 25 units will be set-aside specifically for homeless or those at risk of being homeless at 30% CMI and 14 additoinal units specifically for Vets at 50-60% CMI. 25 units will also meet universal design and targeted to households with disablilties. 4 months prior to occupancy we will start meeting weekly with the property manager, Wayforward, Dane County Veterans, City of Madison, and Dane County to discuss referrals, applications and screening. Wayforward and DCVA will coordinate with the property manager on which units are still available and send referrals. Those referals will get assistance from Wayforward and DCVA to work through the application screening process. This process has worked well for our Limerick project which is currenlty being leased up and we expect to have all of the HSC units full prior to occupancy. On-going the property manager, Wayforward, and DCVA will stay in touch for when existing tenants move out and new referrals are needed.

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.

We will work with a service coordinator, Dane County VA (Heather Campbell), and providers for referrals and to assess the needs of the tenants at move-in and what the tenants will need to maintain stable housing. Case management will be provided by our partner support service provider Middleton Outreach Ministry or other agencies like Joining Forces for Families. We will proactively work with management and our service coordinator with our waiting list and when a supportive unit becomes vacant to place a family in need vs waiting 30 days with the unit vacant and renting to any income eligible household. Wayforward will utilize wraparound a service coordination model where families residing at the property, including Veterans and persons with disabilities, will be given a single point of entry to accessing community and supportive services. An on-site coordinator will meet with individuals and families to complete an intake assessment and develop a strength-based, goal-oriented plan of care. The service coordinator will work with the tenant and their surrounding existing natural supports, to build a comprehensive team, to explore areas of need, and fill gaps in supports where identified.

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.

Please see the supportive services plan and MOU/ Letter from our partner supportive service agency. We've partnered with Wayforward to coordinate services for the target population as well as provide on-site intensive case management services if their organization has capacity. If they do not have capacity for intensive case mgmt for additional households at the time of the vacancy, property management and Wayforard will coordinate with another provider for case management. Currenlty Wayforward believes they have capacity to provide case management to 4-8 households and will provide staff as needed for appropriate case management.

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.).

    Per the MOU the development would pay MOM $10,000 annually above the line as well as find other areas within the community to leverage additional resources. The budget also includes a supportive service reserve (non-basis item), funded from other sources and used to provide additional resources to service provider when needed. We have also signed an MOU with Wayforward to utilize some of the commercial space as a community service facility. In that space they would likely have case management offices, food pantry, etc. The cost for this space would likely be $1/ year as is needed for MOM to grow and meet the needs of their service area.

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?

    4 months prior to occupancy we will start meeting weekly with the property manager, Wayforward, Dane County Veterans, City of Madison, and Dane County to discuss referrals, applications and screening. Wayforward and DCVA will coordinate with the property manager on which units are still available and send referrals. Those referals will get assistance from LSS and DCVA to work through the application screening process. This process has worked well for our recent dane county projects in Fitchburg which is currenlty being leased up. On-going the property manager, MOM, and DCVA will stay in touch for when existing tenants move out and new referrals are needed.

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 been under-represented in AHF Completion Reports.

With a portfolio of more than 4000 units of Section 42, Section 8 and Section 515 housing with varying eligibility requirements and set asides, ACC Management Group, Inc (ACC) has significant experience with providing housing for those with special needs or those least likely to apply. ACC affirmatively markets apartments by working with local referral sources in each market.

ACC will affirmatively market to individuals by working closely with organizations such as:

- The Dane County Aging and Disability Resource Center and the approved Family Care Agencies in Dane County;
- Dane County Human Services and;
- Dane County Veterans Services Office

ACC will:

ACC will work with Latinx and Asian organizations listed below as well as our Service Coordinator the Middleton Outreach Ministry and Joining Forces for Families. ACC will:

- Provide marketing flyers about the apartments to various members of the referral groups, we will ensure that their clients have access to written information about this housing opportunity.
- Reach out and meet directly with staff of the various contracted and member agencies associated with these partners, we will ensure that they are aware of this housing opportunity for their clients and members.
- Stay in regular contact with the entities listed below as well as their respective networks of services providing agencies to receive referrals of households who may wish to live in the Apartments.

All referrals received through our affirmative marketing efforts will be followed up on to ensure they have the opportunity to apply for rental housing at these Apartments. When a housing unit becomes available those at the top of the waiting/ interest list for those units will be notified and directed to contact the property manager to formally apply for housing.

Management will reach to and work with the following local organizations and groups, amongst others, to market available units: Latino Academy of Workforce Development, Latino consortium for Action, Lasup- Latino Support Network of Dane County, Hmong Madison.com, Madison Area Chinese Community Organization, Central Hispano, Urban League, Joining Forces for Families, Freedom-Inc

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.

see above

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.

Currently the 60% rents are underwritten at 95% of max per WHEDA. The 50% units will be rented at rent maximums given the significant discount to market. We will follow the PN loan agreement for rent increases and monitor so that prospective long-term tenants rents aren't rising rapidly after move-in.

PUBLIC BENEFIT AND RISK

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

The project will provide an aestheticly pleasing building that will produce a significantly higher annual real estate tax payment over the current use. We will also be increasing the areas capacity for storm water through management and new green space vs a 100% impervious lot as it currenlty stands. The building willl be mixed use which will allow for some smaller business/ retail in the neighborhood while eliminating underutlized space. The commercial space will also house a community service facility and tenant that provides services to neighborhood specifically targeting those that are low to moderate income. There are a few public risks associated with the project, the greatest being adding households to a historically commericial area- however, the Odana plan has highlighted future uses like the one proposed so we expect more housing to be added to the area soon.

SITE INFORMATION

18. Address of Proposed Site: 6706-6714 Odana Road, Madison WI

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: The site isn't in a neighborhood defined by the City but is near the Oakwood Village, Marbella, and Parkwood neighborhoods.

21. Date Site Control Secured: resecured 07/07/2023

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 site is located near the intersection of Odana and Grand Canyon Drive. We chose this site as the west side of madison has been histrically underserved by new affrodable housing develpments and this areas focus to growth and redevelopment. From a real estate perspective, this site is large enough for redevelopment and is in close proximity to amenities and jobs that will increase the quality of life for our residents. A majority of the area is surrounded by single story retail uses.

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 site currenlty holds two single story retail buildings. There are currenlty 6 leases in place at the White House Shopps. Those leases all expire prior to our acquisition in May of 2025. We will be meeting with all of the tenants to see if there is any interest in those business staying on in the commerical space of the new buidling. The owners have decided to sell the buidling for future redevelopment as the current single story retail has stuggled to attract long term tenants for years. The owners will either sell a vacant building to us for a redevelopment project or will sell to a market rate developer. The buildings would need to be demolished prior to construction.

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.

The site currently holds two single story retail buildings that were built in the 1970's and have been owned by the same family since being built. The buildings were developed from farm land so we do not expect any enviormental issues on site. We will order a phase I on the site in late 2023 prior to submitting our tax credit application.

25. Current zoning of the site: CC 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.

A conditional use permit and demolition permit approval were obtained last year at the November 7th Planning Commission Meeting.

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 site is part of the Odana Area Plan and is targeted as a future growth area
which implements goals in the City's Comprehensive plan. The Odana plan calls for a mixuture of uses in the area including housing and the project meets the height and density of the future land use map.

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	Metcalfe's West Town	.7
Public Elementary School	John Muir	.9
Public Middle School	Gillespie	.6
Public High School	Memorial	.5
Job-Training Facility, Community College, or Continuing Education Programs	The Medical Education Instittute	.8
Childcare	Koal-T-Kare	.3
Public Library	Alicia Ashman Branch	1.64
Neighborhood or Community Center	Lusssier Community Center	.6
Full Service Medical Clinic or Hospital	Uw Health Urgent Care	.5
Pharmacy	CVS	.2
Public Park or Hiking/Biking Trail	Mineral Point Park	.5
Banking	Great Midwest Bank	.1
Retail	Market Square Shopping Center	.2
Other (list the amenities):	West Town Mall	.4

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.

There is a 7 day service stop adjacent to the site at Odana and Grand Caynon and higher service at the Mineral Point and Grand Canyon intersection. The BRT line will run along Minerial Point Road and the site is less than 1/4 mile away. According to the schedule on Madison metro, the 63 & 73 route has a bus running daily and route 67 along Mineral point.

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

Tenants will either walk down Grand Canyon Drive to Mineral Point or the Odana Road plan shows a walking path through the park adjacent to the north of the site which would direclty connect the site to the schools. Northpointe worked with the City of Madison and will grant an easement if the property is purchased to install the walking path.

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 with many of the amenities listed above being less than ..5 miles from the site. The site has a bus stop adjacent feet and will be located less than .25 miles from the new BRT line. There are many food options including Metcalfs, Walgreens, woodmans, and restaurants near the site. After school activites are within walking

distance. The nearest library public library is 1.5 miles from the site but residents will have access to book etc at the Lussier Community Center. The property will offer parking and there will be ample parking on-stie as well as B-Cycle access for residents. There are thousands of jobs located near the site with major employeers recently coming into the area including Exact Sciencies and Nexus. communities like Verona and Middleton have significant job centers and are both a 5-10 minute drive from the site.

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).

he report shows that in general, the number of children attending Madison schools is expected to decline over the next 5 years. The site is located nearest to the Muir Elementary School which is at 82% capcacity and Gillespie Middle school witch is at 78% capacity. The schools are projected to be at 86% and 77% respectilvy in 5 years. We would expect between 30-40 elementary and middleschool children to live at the site given the unit mix. We have established a working relationship with the schools for our Uno project and believe that we would be able to continue growing our relationship and partnership.

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.

June 22 2022 we had our pre-application meeting. discussion went very well. Discussed making some slight tweaks to the building design, working with the bank next door to have walking access to grand canyon from the back of the site. We also discussed zoning and fit to the Odana road plan. We remet with CDD in July of 2023 to discuss reapplying for the funds.

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?

We presented at DAT on July 14th 2022. Comments regarding easements and items that will need to be cleaned up. No major issues identified based on our proposed use or layout.

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.

We have reached out to the local alder and ajoining alder in district 9. The new local alder didn't have any concerns. See attached email.

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.).

We held our neighborhood meeting on August 10th 2022 with the development team, city staff, and Alder Furman in attendance. We only had a few citizens attend the meeting and the questions were more general in nature. People were interested in the green features, retail component, and overall believe that Madison needs more housing. We didn't hear any concerns about our proposed plan for the site.

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.

We will work with our alder to communicant with the neighborhoods. Since this project isn't in a traditional neighborhood we will rely on their guidance and expertiese which is what we did at our Uno's project. This included speaking with the school principals and community center staff. About 4 months prior to occupancy we will begin meeting with our property manager, City of Madison, and service providers to discuss marketing and referrals. This has worked well on our previous projects.

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?

Northpointe Development plans to bring quality affordable housing into an area of social and economic opportunities. Stable housing paired with proximity to jobs, schools, amenities is vital to promiting social equality. Northpointe plans to co-develop the site with Selassie Development an emerging developer to help build their capacity and experience in housing development. The site will also have a Community Service Faciltity that will target services to low to moderate households in the neighborhood.

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?

Selassie Development is an emeging minority developer that has taken a meaningful role on multiple developments with Northpointe. Over the past few months of partnership Selassie has started to build their capacity, knowledge, and network within the community development space. Going forward we will both continue to build on this momentum.

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 site will have multiple commerical units with (likley) a coffee shop or other small business with a food focus as well as a Community Service Facility. The apartment building will have underground parking. There will also be outdoor amenities including an outdoor patio with grilling station, fire pit, picnic area and large/ safe play area. There is large park adjacent to the site and the city plans to add new walking paths in the near future.site will include walking paths. The property manager will cordinate onsite activites. An MOU has been signed with Wayforward to provide a service coordinator at the project to work with all tenants but especially the supportive housing target population. Another MOU has been signed with Dane County Vets office to provider services to the Vet households. We intend to work with Bcycle to provide Ebikes at the site for no cost to the residents.

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 interior common area amenties will include a community room, exercise room, and a community service facility. There will be a year-round indoor play space. The community service facility will be occupied by Wayforward and used to provide case management services and emergeny food supplies.

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?

There will be approximatley 40-50 surface spots and we will be working with our neighboring site owners for shared parking opportunities. There will also be about 110-120 underground parking spots and we intent to charge a monthly fee of $45-$55/ month. Parking cost will not vary by CMI level. The parking ratio will be approximatly 1.33 spaces to units.

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.

The commerical space will include a 1000 square foot community service facility which will be occupied by Wayforward. This space will inlcude offices to provide case management services to residents and other memebers of the community as well as a emergency food panty. The other 3500 sq feet of space will be targeted to the local small business owners that currenly occupy the white house shops.

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 unit will have LVP flooring, solid surface countertops, stainless steel appliances, washer and dryer included, balconies, and internet fiber direclty installed to the units with free internet for tenants to use. The building will be non-smoking. The units are sized appropriately and will have the proper number of bathrooms in the unit (ie two-bedrooms and three bedrooms will have at least two bathrooms.) The building will have an EPA indoor Air Plus certification meaning fresh air will always be circulated in the common areas and unit kitchen and bath fans will continuously cirrculate air to the outside of the unit.

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.

Activity/Benchmark	Estimated Month/Year of Completion
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [*Target/Actual Month/Date*]	7/2022
1st Development Assistance Team/ Meeting (Due by 9/14/23) [*Target/Actual Month/Date*]	7/2022
1st Neighborhood Meeting (Due by 9/14/23) [*Target Month/Date*]	8/2022
Submission of Land Use Application (Zoning Map Amendments Due by 10/16/23)	9/2022
Submission of Land Use Application (Permissively Zoned Due by 11/27/23)	9/2022
Plan Commission Consideration (If Rezoning, 11/27/23 Meeting for 12/5/23 Common Council)	11/2022
Urban Design Commission Consideration, if applicable [*Target Month/Date*]	N/A
Application to WHEDA	1/2024
Complete Equity & Debt Financing	5/2024
Acquisition/Real Estate Closing	5/2025
Rehab or New Construction Bid Publishing	2/2025
New Construction/Rehab Start	5/2025
Begin Lease-Up/Marketing	3/2026
New Construction/Rehab Completion	7/2026
Certificates(s) of Occupancy Obtained	7/2026
Complete Lease-Up	9/2026
Request Final AHF Draw	9/2026

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.

ADDRESS #1:		**6706 Odana Road**									
		# of Bedrooms					**Projected Monthly Unit Rents, Including Utilities**				
% of County Median Income (CMI)	**Total # of units**	**# of Studios**	**# of 1 BRs**	**# of 2 BRs**	**# of 3 BRs**	**# of 4+ BRs**	**$ Rent for Studios**	**$ Rent for 1 BRs**	**$ Rent for 2 BRs**	**$ Rent for 3 BRs**	**$ Rent for 4+ BRs**
≤30%	25	6	10	6	3	0	641	687	824	952	
40%	0	0	0	0	0	0					
50%	49	6	23	3	17	0	1068	1145	1373	1587	
60%	16	1	12	2	1	0	1220	1308	1569	1814	
Affordable Sub-total	**90**	**13**	**45**	**11**	**21**	**0**					
80%	34	1	19	9	5	0	1245	1346	1714	2073	
Market*	0	0	0	0	0	0					
Total Units	**124**	**14**	**64**	**20**	**26**	**0**	Notes/Utility Allowance Assumptions:heat, water, sewer included				

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

ADDRESS #2:		**N/A**									
		# of Bedrooms					**Projected Monthly Unit Rents, Including Utilities**				
% of County Median Income (CMI)	**Total # of units**	**# of Studios**	**# of 1 BRs**	**# of 2 BRs**	**# of 3 BRs**	**# of 4+ BRs**	**$ Rent for Studios**	**$ Rent for 1 BRs**	**$ Rent for 2 BRs**	**$ Rent for 3 BRs**	**$ Rent for 4+ BRs**
≤30%	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					
Affordable Sub-total	**0**	**0**	**0**	**0**	**0**	**0**					
80%	0	0	0	0	0	0					
Market*	0	0	0	0	0	0					
Total Units	**0**	**0**	**0**	**0**	**0**	**0**	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: EBike Membership if desired

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	45
1-Bedroom	51
2-Bedroom	64
3-Bedroom	78

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 be 100% visitable, only 50% is required by the 4% tax credit program. 20% of the units will be equipped with univeral design features with the remained of the units having the capacity to add accessiblity features if a tenant requests a reasonalble accomidation. 5% of the units will be Type A vs the 2% required by code.

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?

20% of the units will include universal design features that meet all WHEDA requirements. However, all of the units will have features that are listed in the WHEDA application for universal design including: accessible public restrooms, automatic door openers, braille signage, rocker light switches, low pile carpets, easy opening windows,etc.

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.

We have consistantly exceeded WHEDA requirements using the Wisconsin Green Built Homes Certification. We have started to add on Engery Star and EPA indoor air plus certifications. We have 2 projects under construction in Dane County, all of which will have PV solar systems. Our next 5 buildings in Wisconsin will be Energy Star with solar. We are also familiar with Enterprise from working in other states.

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.

We are working with Full Spectrum and plan to install a 135kw solar system on the roof that will eliminate up to 90% of the projects common area energy usage. We've confirmed that the project is serviced by MG&E so the size of the system is feasible at this site. We will also be working with Focus on Energy and will be installing highly efficient furnaces and other materials. The project will also help with stormwater management since the current use is 100% impervious. The proejct will be energy star certified which is considered net zero ready.

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.

Wisconin Green Built Gold Stardard, 250 points including Energy Star multifamily New Construction and EPA indoor air plus certifications. We will work with Sol Consulting on these certifications.

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.

solar panels, eletric stoves/ dryer, EV charging stations.

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?

Water saving faucets, showerheads, and high quality low-flush toiltes will be installed. Property management will educate tenants on water saving practices. Given the size and location of the site, Northpointe will have to get further into the design of the site and work closely with our architect and engineer to determin if other design strategies can be incorporated.

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:	6706 Odana Road								
	0	124 (combined)	0	3	0	124 visitable combined	1,825,000	16,000,000	1,825,000
Address:	6714 Odana Road								
	0	124 (combined)	0	3	0	124 visitable combined	1,625,000	16,000,000	1,625,000
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.

There are two buildings on site. Both of the buildings will have to be demolished prior to starting construction. We would pull demo permits on or shortly after our acquisition date of the building.

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.

There are currenlty 6 leases in place at the White House Shopps. Those leases all expire prior to our acquisition in May of 2025. We will be meeting with all of the tenants to see if there is any interest in those business staying on in the commerical space of the new buidling. The owners have decided to sell the buidling for future redevelopment as the current single story retail has stuggled to attract long term tenants for years. The owners will either sell a vacant building to us for a redevelopment project or will sell to a market rate developer. Our team reached out to DOA staff and after conversations and review of State Statues we do not believe the Wisconsin Relocation Requirements for Business, Farms, and Non-profits applies in this instance. First, we must determine if we are a “Displacing Agency” which we don’t not believe we meet the definition. Then, an agency must perform its own analysis to determine whether there are displaced persons. As the tenants have over almost two years until we would purchase the building/ start construction and the tenant’s leases naturally end prior to the acquisition there wouldn’t be any displaced persons as defined under State Statue. Wis Admin Code 92.01(14)(b)11.

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.

The proejct will be manager managed LLC as you would see typcially for a tax credit development. The MM will be owned 76% by Northpointe Development II Corporation and 24% owned by Selassie Development.

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 project will not be co-developed by a non-profit.

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.

Selassie Development is a BIPOC development firm. Both firms will have an extensive roll in the development from entitlements through lease up and ongoing operations of the development. Northpointe and Dreamlane will work together on all decisions and both will be involved in all facets of the development. Dreamlane will receive 24% ownership included voting rights and cash flow and 12.5% of the developer fee.

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
Sean O'Brien	Northpointe Development	Developer	sean@northpointe.com	608-334-5665
Sam Haile	Selassie Development	Co-Developer	samhaile82@yahoo.com	608-669-0994
Bob Feller	Knothe Bruce	Architect	bfeller@knothebruce.com	608-836-3690

Chris Hand	ACC	Property Managment	chris@accmanagment.com	920-966-9905
Bill Cummings	Reinhart	Attorney	wcummings@reinhartlaw.com	414-298-8330

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

		BIPOC		Women	
Company	**Role in Development**	**#**	**%**	**#**	**%**
Northpointe Development	Developer	0	0	3	75
Selassie Development	Co-Developer	1	100	0	0
	Co-Developer				
TBD	General Contractor				
ACC	Property Manager	52	19%	132	49%
Knothe & Bruce	Architect	1	4%	4	36%
Wayforward	Service Provider	4	21%	16	84%

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.

This is something that we will look into prior to closing. However, depending on the other sources of financing, their requirements, and ability to repay the deferred fee during the compliance period we may need to keep the payments as cash flow contingent after the deferred fee is paid. However, like listed above we are committing to permanent affordability.

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
Shreedhar Ranabhat	WHEDA Commerical Lending Director	shreedhar.ranabhat@wheda.com	608-266-2781
Will Deppeisesse	Nicolet Bank- VP Commerical Banking	wdeppeiesse@nicoletbank.com	920-882-2857
Aday Sayre	City of Verona- Director of Planning and Development	adam.sayre@ci.verona.wi.us	608-848-9941

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: **Northpointe Development- Merchant Place Apartments**

1. CAPITAL BUDGET

Enter ALL proposed project funding sources.

FUNDING SOURCES

Source	Amount	Non-Amortizing (Y/N)	Rate (%)	Term (Years)	Amort. Period (Years)	Annual Debt Service
Permanent Loan-Lender Name:						
WHEDA	$ 12,870,000	n	6.25%	35	35	$906,681
Subordinate Loan 1-Lender Name:						
Subordinate Loan 2-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
WHEDA						
City Request (AHF, HOME, TIF)						
AHF	$ 3,250,000	y	2.75%	30	30	cash flow
Subordinate TIF Loan-Lender Name:						
AHP Loan (List FHLB):						
Dane County AHDF:						
AHDF	$ 2,500,000	y	2.00%	40	40	cashflow
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						

Tax Credit Equity	$ 21,755,878
Historic Tax Credit Equity (Fed and/or State)	$ -
Deferred Developer Fees	$ 2,684,009
Owner Investment	
Other-Specify:	
Total Sources	**$ 43,059,887**

Do you plan on submitting an application for TIF?

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan 1-Lender Name:			
WHEDA - LT Bonds	$ 12,870,000	6.25%	24
Construction Loan 2-Lender Name:			
WHEDA - ST Bonds	$ 15,000,000	5.00%	24
Construction Loan 3-Lender Name:			
Construction Loan 4-Lender Name:			
Bridge Loan-Lender Name:			
			24
Housing Tax Credit Equity:			
ONB	$ 8,702,351		
Historic Tax Credit Equity:			
Other-Specify:			

soft funds (dane county and city of madison)	$	5,175,000	2.75%	24
Total	**$**	**21,572,351**		

Estmated pricing on sale of Federal Tax Credits: $ 0.87

Estmated pricing on sale of State Tax Credits: $ 0.73
(if applicable)

Remarks Concerning Project Funding Sources:

APPLICANT: **Northpointe Development- Merchant Place Apartments**

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	**Amount**
Land	$3,450,000
Existing Buildings/Improvements	$0
Other (List)	
	$0
Construction:	
Construction/Rehab Costs	$26,342,500
E - Equipment & Furnishings	$0
F - Special Construction & Demolition	$0
Accessory Buildings	$0
Personal Property/FF&E	$200,000
Site Work Costs (on-site & off-site)	$0
Landscaping	$0
Contractor Fees:	
General Requirements	$1,327,125
Construction Overhead	$557,393
Construction Profit	$1,421,351
Construction Supervision	$0
Contingency Funds:	
Construction Contingency	$1,492,418
Other Contingency	$0
Construction Period Expenses/Soft Costs:	
Construction Loan Origination Fee	$198,700
Construction Loan Credit Enhancement/LOC	$28,000
Cost of Bond Issuance	$0
Bridge Loan Fees and Expenses	$0
Construction Loan Interest	$1,200,000
Construction Loan Origination Fee	$0
Construction Period Real Estate Taxes	$80,000
Title and Recording	$25,000
Builder's Risk/Property Insurance	$100,000
Temporary Relocation Assistance	$0
Permanent Relocation Assistance	$0
Other Interim/Construction Costs (list)	
	$0
Permanent Financing Expenses:	
Permanent Loan Origination Fee	$7,500
Credit Enhancement	$0
Other Permanent Loan Fees	$0
Legal Fees - Real Estate	$100,000
Architectural & Engineering:	
Architect - Design	$195,000

<---

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:
135 kw solar	$800,000
energy star cert upgrades	

Architect - Supervision	$62,000
Engineering	$50,000
Survey	$6,400
Other Architect/Engineering (list)	
	$0
Syndication Fees & Expenses:	
Organizational Fees	$12,000
Other Syndication Costs (list)	
	$0
Capitalized Reserves:	
Operating Reserve	$800,000
Replacement Reserve	$0
Lease-Up Reserve	$50,000
Debt Service Reserve	$0
Capital Needs Reserve	$0
Other Reserves	$0
Escrows	$0
Other Capitalized Reserves (list)	
	$0
Reports, Studies & Related Work:	
Appraisal	$10,000
Market Study	$7,500
Environmental Reports	$10,000
Capital Needs Assessment Report	$0
Other (list)	
	$0
Other Soft Costs:	
Tax Credit Fees - Application	$2,000
Tax Credit Fees - Compliance	$0
Tax Credit Fees - Allocation	$250,000
Permits & impact fees - water, sewer, etc.	$0
Cost Certification/Accounting fees	$15,000
Lease-Up Period Marketing	$100,000
Title Insurance and Recording	$0
Capital Needs Assessment (rehab only)	$0
Legal	$0
Other (list)	
	$0
Developer Earned Fees & Expenses:	
Developer's Fee	$4,960,000
Developer Overhead	$0
Consultant Fees	$0
Other fees (list)	
	$0
Total Costs:	**$43,059,887**

APPLICANT: **Northpointe Development- Merchant Place 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	1,795,567	1,831,478	1,868,108	1,905,470	1,943,579	1,982,451	2,022,100	2,062,542	2,103,793	2,145,869	2,188,786	2,232,562	2,277,213	2,322,757	2,369,213	2,416,597
Less Vacancy/Bad Debt	125,690	128,203	130,768	133,383	136,051	138,772	141,547	144,378	147,266	150,211	153,215	156,279	159,405	162,593	165,845	169,162
Income from Non-Residential Use*	84,797	86,493	88,223	89,987	91,787	93,623	95,495	97,405	99,353	101,340	103,367	105,434	107,543	109,694	111,888	114,126
Total Revenue	1,754,674	1,789,768	1,825,563	1,862,074	1,899,316	1,937,302	1,976,048	2,015,569	2,055,881	2,096,998	2,138,938	2,181,717	2,225,351	2,269,858	2,315,255	2,361,561
Expenses:																
Office Expenses and Phone	9,300	9,579	9,866	10,162	10,467	10,781	11,105	11,438	11,781	12,134	12,498	12,873	13,260	13,657	14,067	14,489
Real Estate Taxes	260,500	268,315	276,364	284,655	293,195	301,991	311,051	320,382	329,994	339,893	350,090	360,593	371,411	382,553	394,030	405,851
Advertising, Accounting, Legal Fees	27,716	28,547	29,404	30,286	31,195	32,130	33,094	34,087	35,110	36,163	37,248	38,365	39,516	40,702	41,923	43,181
Payroll, Payroll Taxes and Benefits	65,000	66,950	68,959	71,027	73,158	75,353	77,613	79,942	82,340	84,810	87,355	89,975	92,674	95,455	98,318	101,268
Property Insurance	37,200	38,316	39,465	40,649	41,869	43,125	44,419	45,751	47,124	48,538	49,994	51,493	53,038	54,629	56,268	57,956
Mtc, Repairs and Mtc Contracts	99,000	101,970	105,029	108,180	111,425	114,768	118,211	121,758	125,410	129,173	133,048	137,039	141,150	145,385	149,746	154,239
Utilities (gas/electric/fuel/water/sewer)	72,500	74,675	76,915	79,223	81,599	84,047	86,569	89,166	91,841	94,596	97,434	100,357	103,368	106,469	109,663	112,953
Property Mgmt	87,734	90,366	93,077	95,869	98,745	101,708	104,759	107,902	111,139	114,473	117,907	121,444	125,088	128,840	132,706	136,687
Operating Reserve Pmt		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	37,200	38,316	39,465	40,649	41,869	43,125	44,419	45,751	47,124	48,538	49,994	51,493	53,038	54,629	56,268	57,956
Support Services	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668	13,048	13,439	13,842	14,258	14,685	15,126	15,580
Other (List)																
state compliance	5,580	5,747	5,920	6,097	6,280	6,469	6,663	6,863	7,069	7,281	7,499	7,724	7,956	8,194	8,440	8,693
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Operating Expenses	711,730	733,082	755,074	777,727	801,058	825,090	849,843	875,338	901,598	928,646	956,506	985,201	1,014,757	1,045,199	1,076,555	1,108,852
Net Operating Income	1,042,944	1,056,686	1,070,489	1,084,348	1,098,258	1,112,212	1,126,205	1,140,231	1,154,282	1,168,352	1,182,433	1,196,516	1,210,594	1,224,659	1,238,700	1,252,708
Debt Service:																
First Mortgage	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681
Total Annual Cash Expenses	1,618,411	1,639,763	1,661,755	1,684,408	1,707,739	1,731,771	1,756,524	1,782,019	1,808,279	1,835,327	1,863,187	1,891,882	1,921,438	1,951,880	1,983,236	2,015,533
Total Net Operating Income	136,263	150,005	163,808	177,667	191,577	205,531	219,524	233,550	247,601	261,671	275,752	289,835	303,913	317,978	332,019	346,027
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	136,263	150,005	163,808	177,667	191,577	205,531	219,524	233,550	247,601	261,671	275,752	289,835	131,225	0	0	0
Cash Flow	0	0	0	0	0	0	0	0	0	0	0	0	172,688	317,978	332,019	346,027
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	45,000	45,000	45,000	45,000

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

DCR Hard Debt	1.15	1.17	1.18	1.20	1.21	1.23	1.24	1.26	1.27	1.29	1.30	1.32	1.34	1.35	1.37	1.38
DCR Total Debt	1.15	1.17	1.18	1.20	1.21	1.23	1.24	1.26	1.27	1.29	1.30	1.32	1.27	1.29	1.30	1.32

Assumptions

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

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

parking for underground is 55/ stall per month

APPLICANT: **Northpointe Development- Merchant Place 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	2,464,929	2,514,227	2,564,512	2,615,802	2,668,118	2,721,480	2,775,910	2,831,428	2,888,057	2,945,818	3,004,734	3,064,829	3,126,126	3,188,648
Less Vacancy/Bad Debt	172,545	175,996	179,516	183,106	186,768	190,504	194,314	198,200	202,164	206,207	210,331	214,538	218,829	223,205
Income from Non-Residential Use*	116,408	118,736	121,111	123,533	126,004	128,524	131,094	133,716	136,391	139,118	141,901	144,739	147,634	150,586
Total Revenue	2,408,792	2,456,968	2,506,107	2,556,229	2,607,354	2,659,501	2,712,691	2,766,945	2,822,284	2,878,729	2,936,304	2,995,030	3,054,930	3,116,029
Expenses:														
Office Expenses and Phone	14,924	15,371	15,833	16,308	16,797	17,301	17,820	18,354	18,905	19,472	20,056	20,658	21,278	21,916
Real Estate Taxes	418,026	430,567	443,484	456,788	470,492	484,607	499,145	514,119	529,543	545,429	561,792	578,646	596,005	613,885
Advertising, Accounting, Legal Fees	44,476	45,810	47,185	48,600	50,058	51,560	53,107	54,700	56,341	58,031	59,772	61,565	63,412	65,315
Payroll, Payroll Taxes and Benefits	104,306	107,435	110,658	113,978	117,397	120,919	124,547	128,283	132,132	136,096	140,178	144,384	148,715	153,177
Property Insurance	59,695	61,486	63,331	65,230	67,187	69,203	71,279	73,417	75,620	77,889	80,225	82,632	85,111	87,664
Mtc, Repairs and Mtc Contracts	158,866	163,632	168,541	173,597	178,805	184,169	189,694	195,385	201,247	207,284	213,503	219,908	226,505	233,300
Utilities (gas/electric/fuel/water/sewer)	116,341	119,831	123,426	127,129	130,943	134,871	138,917	143,085	147,378	151,799	156,353	161,043	165,875	170,851
Property Mgmt	140,787	145,011	149,361	153,842	158,457	163,211	168,107	173,151	178,345	183,696	189,206	194,883	200,729	206,751
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	59,695	61,486	63,331	65,230	67,187	69,203	71,279	73,417	75,620	77,889	80,225	82,632	85,111	87,664
Support Services	16,047	16,528	17,024	17,535	18,061	18,603	19,161	19,736	20,328	20,938	21,566	22,213	22,879	23,566
Other (List)														
state compliance	8,954	9,223	9,500	9,785	10,078	10,380	10,692	11,013	11,343	11,683	12,034	12,395	12,767	13,150
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenses	1,142,118	1,176,381	1,211,673	1,248,023	1,285,464	1,324,027	1,363,748	1,404,661	1,446,801	1,490,205	1,534,911	1,580,958	1,628,387	1,677,238
Net Operating Income	1,266,674	1,280,586	1,294,434	1,308,206	1,321,890	1,335,473	1,348,943	1,362,284	1,375,483	1,388,525	1,401,393	1,414,072	1,426,544	1,438,791
Debt Service:														
First Mortgage	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681	906,681
Total Annual Cash Expenses	2,048,799	2,083,062	2,118,354	2,154,704	2,192,145	2,230,708	2,270,429	2,311,342	2,353,482	2,396,886	2,441,592	2,487,639	2,535,068	2,583,919
Total Net Operating Income	359,993	373,905	387,753	401,525	415,209	428,792	442,262	455,603	468,802	481,844	494,712	507,391	519,863	532,110
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cash Flow	359,993	373,905	387,753	401,525	415,209	428,792	442,262	455,603	468,802	481,844	494,712	507,391	519,863	532,110
AHF City Interest Loan	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000	45,000

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

DCR Hard Debt	1.40	1.41	1.43	1.44	1.46	1.47	1.49	1.50	1.52	1.53	1.55	1.56	1.57	1.59
DCR Total Debt	1.33	1.35	1.36	1.37	1.39	1.40	1.42	1.43	1.45	1.46	1.47	1.49	1.50	1.51

Assumptions

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

GENERAL NOTES:

1. THE APPLICANT SHALL REPLACE ALL SIDEWALK AND CURB AND GUTTER THAT ABUTS THE PROPERTY THAT IS DAMAGED BY THE CONSTRUCTION, OR ANY SIDEWALK AND CURB AND GUTTER WHICH THE CITY ENGINEER DETERMINES NEEDS TO BE REPLACED BECAUSE IT IS NOT AT A DESIRABLE GRADE, REGARDLESS OF WHETHER THE CONDITION EXISTED PRIOR TO BEGINNING CONSTRUCTION.

2. ALL WORK IN THE PUBLIC RIGHT OF WAY SHALL BE PERFORMED BY A CITY-LICENSED CONTRACTOR.

3. ALL DAMAGE TO THE PAVEMENT ON CITY STREETS, AND ADJACENT TO THIS DEVELOPMENT SHALL BE RESTORED IN ACCORDANCE WITH THE CITY OF MADISON'S PAVEMENT PATCHING CRITERIA.

4. ALL PROPOSED STREET TREE REMOVALS WITHIN THE RIGHT OF WAY SHALL BE REVIEWED BY CITY FORESTRY BEFORE THE PLAN COMMISSION MEETING. STREET TREE REMOVALS REQUIRE APPROVAL AND A TREE REMOVAL PERMIT ISSUED BY CITY FORESTRY. ANY STREET TREE REMOVALS REQUESTED AFTER THE DEVELOPMENT PLAN IS APPROVED BY THE PLAN COMMISSION OR THE BOARD OF PUBLIC WORKS AND CITY FORESTRY WILL REQUIRE A MINIMUM OF A 72-HOUR REVIEW PERIOD WHICH SHALL INCLUDE THE NOTIFICATION OF THE ALDERPERSON WITHIN WHO'S DISTRICT IS AFFECTED BY THE STREET TREE REMOVAL(S) PRIOR TO A TREE REMOVAL PERMIT BEING ISSUED.

5. AS DEFINED BY THE SECTION 107.13 OF CITY OF MADISON STANDARD SPECIFICATIONS FOR PUBLIC WORKS CONSTRUCTION: NO EXCAVATION IS PERMITTED WITHIN 5 FEET OF THE TRUNK OF THE STREET TREE OR WHEN CUTTING ROOTS OVER 3 INCHES IN DIAMETER. IF EXCAVATION IS NECESSARY, THE CONTRACTOR SHALL CONTACT MADISON CITY FORESTRY (266-4816) PRIOR TO EXCAVATION. CITY OF MADISON FORESTRY PERSONNEL SHALL ASSESS THE IMPACT TO THE TREE AND TO ITS ROOT SYSTEM PRIOR TO WORK COMMENCING. TREE PROTECTION SPECIFICATIONS CAN BE FOUND ON THE FOLLOWING WEBSITE: CITYOFMADISON.COM/BUSINESS/PW/SPECS.CFM

6. CONTRACTOR SHALL TAKE PRECAUTIONS DURING CONSTRUCTION TO NOT DISFIGURE, SCAR, OR IMPAIR THE HEALTH OF ANY STREET TREE. CONTRACTOR SHALL OPERATE EQUIPMENT IN A MANNER AS TO NOT DAMAGE THE BRANCHES OF THE STREET TREE(S). THIS MAY REQUIRE USING SMALLER EQUIPMENT AND LOADING AND UNLOADING MATERIALS IN A DESIGNATED SPACE AWAY FROM TREES ON THE CONSTRUCTION SITE. ANY DAMAGE OR INJURY TO EXISTING STREET TREES (EITHER ABOVE OR BELOW GROUND) SHALL BE REPORTED IMMEDIATELY TO CITY FORESTRY AT 266-4816. PENALTIES AND REMEDIATION SHALL BE REQUIRED.

7. SECTION 107.13(G) OF CITY OF MADISON STANDARD SPECIFICATIONS FOR PUBLIC WORKS CONSTRUCTION ADDRESSES SOIL COMPACTION NEAR STREET TREES AND SHALL BE FOLLOWED BY CONTRACTOR. THE STORAGE OF PARKED VEHICLES, CONSTRUCTION EQUIPMENT, BUILDING MATERIALS, REFUSE, EXCAVATED SPOILS OR DUMPING OF POISONOUS MATERIALS ON OR AROUND TREES AND ROOTS WITHIN FIVE (5) FEET OF THE TREE OR WITHIN THE PROTECTION ZONE IS PROHIBITED.

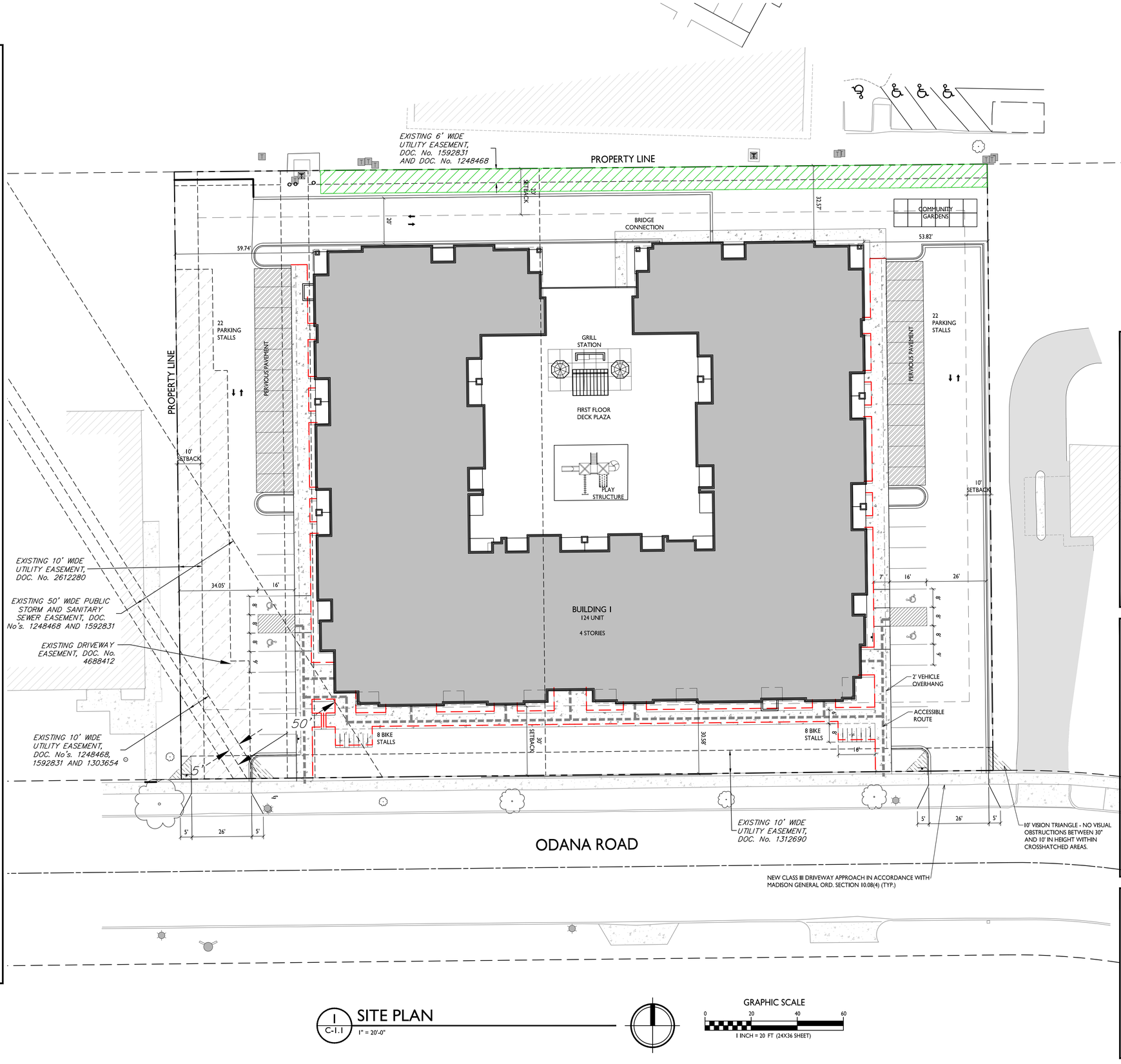
8. ON THIS PROJECT, STREET TREE PROTECTION ZONE FENCING IS REQUIRED. THE FENCING SHALL BE ERECTED BEFORE THE DEMOLITION, GRADING OR CONSTRUCTION BEGINS. THE FENCE SHALL INCLUDE THE ENTIRE WIDTH OF TERRACE AND, EXTEND AT LEAST 5 FEET ON BOTH SIDES OF THE OUTSIDE EDGE OF THE TREE TRUNK. DO NOT REMOVE THE FENCING TO ALLOW FOR DELIVERIES OR EQUIPMENT ACCESS THROUGH THE TREE PROTECTION ZONE.

9. STREET TREE PRUNING SHALL BE COORDINATED WITH MADISON FORESTRY AT A MINIMUM OF TWO WEEKS PRIOR TO THE START OF CONSTRUCTION FOR THIS PROJECT. ALL PRUNING SHALL FOLLOW THE AMERICAN NATIONAL STANDARDS INSTITUTE (ANSI) A300 - PART 1 STANDARDS FOR PRUNING.

10. AT LEAST ONE WEEK PRIOR TO STREET TREE PLANTING, CONTRACTOR SHALL CONTACT CITY FORESTRY AT (608) 266-4816 TO SCHEDULE INSPECTION AND APPROVAL OF NURSERY TREE STOCK AND REVIEW PLANTING SPECIFICATIONS WITH THE LANDSCAPER.

11. APPROVAL OF PLANS FOR THIS PROJECT DOES NOT INCLUDE ANY APPROVAL TO PRUNE, REMOVE, OR PLANT TREES IN THE PUBLIC RIGHT-OF-WAY. PERMISSION FOR SUCH ACTIVITIES MUST BE OBTAINED FROM THE CITY FORESTER (266-4816).

12. THE PUBLIC RIGHT-OF-WAY IS THE SOLE JURISDICTION OF THE CITY OF MADISON AND IS SUBJECT TO CHANGE AT ANY TIME. NO ITEMS SHOWN ON THIS SITE PLAN IN THE RIGHT-OF-WAY ARE PERMANENT AND MAY NEED TO BE REMOVED AT THE APPLICANTS EXPENSE UPON NOTIFICATION BY THE CITY.



1 / C-1.1 SITE PLAN
1" = 20'-0"

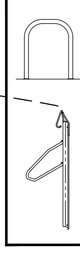
GRAPHIC SCALE
0 20 40 60
1 INCH = 20 FT (24X36 SHEET)

SHEET INDEX

SITE	
C-1.1	SITE PLAN
C-1.2	OVERALL SITE LIGHTING
C-1.3	FIRE DEPARTMENT ACCESS
C-1.4	LOT COVERAGE
C-1.5	USABLE OPEN SPACE
CIVIL	
C-1.0	EXISTING CONDITIONS
C-2.0	DEMOLITION PLAN
C-3.0	OVERALL GRADING & EROSION PLAN
C-3.1	GRADING PLAN - WEST
C-3.2	GRADING PLAN - EAST
C-4.0	OVERALL UTILITY PLAN
L-1.0	LANDSCAPE PLAN
ARCHITECTURAL	
A-1.0	BASEMENT PLAN
A-1.1	FIRST FLOOR PLAN
A-1.2	SECOND FLOOR PLAN
A-1.3	THIRD FLOOR PLAN
A-1.4	FOURTH FLOOR PLAN
A-1.5	ROOF PLAN
A-201	EXTERIOR ELEVATIONS
A-202	EXTERIOR ELEVATIONS
A-203	EXTERIOR ELEVATIONS
A-204	ELEVATIONS COLORED
A-205	ELEVATIONS COLORED
A-206	ELEVATIONS COLORED
	EXTERIOR RENDERINGS

Site Development Data:

Zoning	CC
Densities:	
Lot Area	92,674 S.F./2.12 ACRES
Dwelling Units	124 units
Lot Area / D.U.	747 S.F./D.U.
Density	59 units/Acre
Lot Coverage	74,440 S.F. (80%)
Usable Open Space	28,675 S.F. (231 S.F./unit)
Building Height	4 stories
Commercial Area	4,791 S.F.
Dwelling Unit Mix:	
Studio	14
One Bedroom	64
Two Bedroom	20
Three Bedroom	8
htree bedroom townhome	18
Total	124 dwelling Units
Vehicle Parking Stalls:	
Underground Garage	123
Surface	44
Total	167 vehicle parking stalls
Bicycle Parking:	
Garage	137
Surface - Commercial/Guests	16
Total	153 bike stalls



BIKE RACKS

INTERIOR & EXTERIOR FLOOR MOUNTED: "INVERTED U" TYPE. MADRAX UX OR SARIS BIKE DOCK

INTERIOR WALL MOUNTED: MADRAX VERTICAL RACK OR SARIS BIKE TRACK

knothe bruce ARCHITECTS
Phone: 608.836.3690
7601 University Ave, Ste 201
Middleton, WI 53562

ISSUED
Issued for Land Use Submittal - September 26, 2022

PROJECT TITLE
Odana Road Site Concept

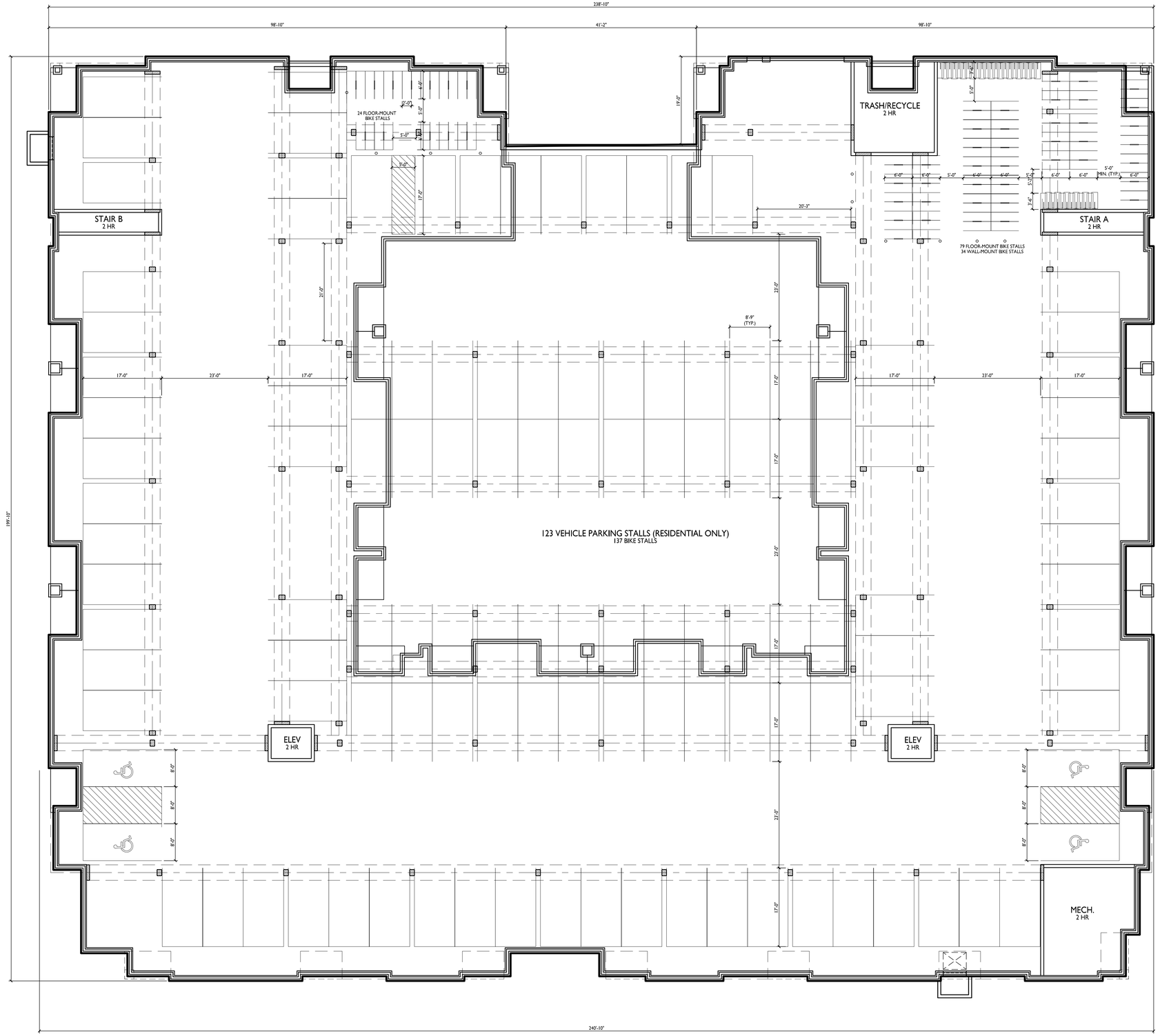
Northpointe Development

Odana Rd, Madison

SHEET TITLE
Site Plan

SHEET NUMBER
C-1.1

PROJECT NO. 2233



1 A-1.0 BASEMENT FLOOR PLAN

3/32" = 1'-0"

knothe bruce ARCHITECTS
Phone: 608.836.3690
7601 University Ave, Ste 201
Middleton, WI 53562

ISSUED

Issued for LUA & UDC - September 26, 2022
Issued for Review - January 19, 2023

PROJECT TITLE

Odana Road
Site Concept

Northpointe
Development

Odana Rd, Madison

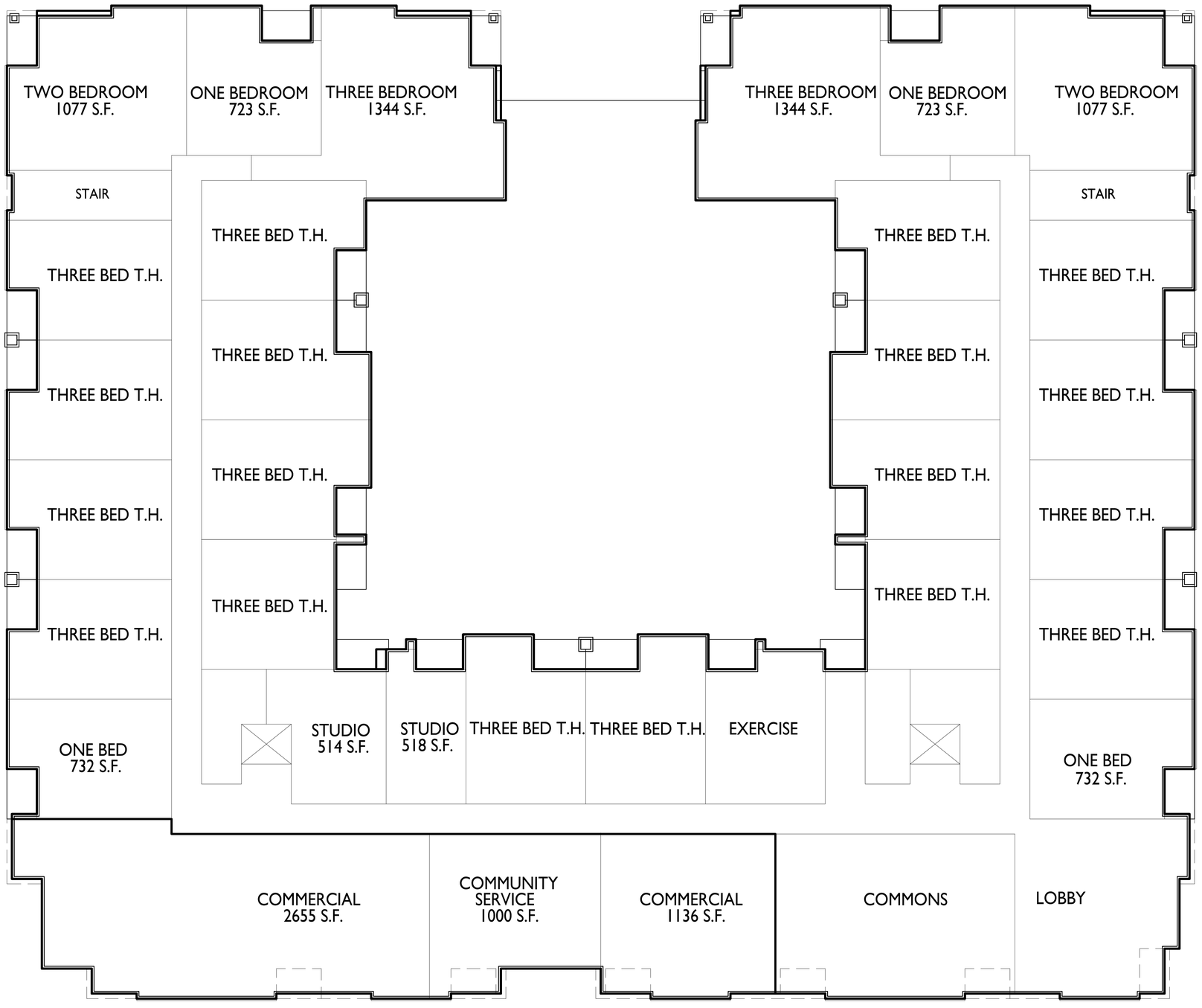
SHEET TITLE

Basement Floor
Plan

SHEET NUMBER

A-1.0

PROJECT NO. 2233



1 A-1.1 FIRST FLOOR PLAN

3/32" = 1'-0"

knothe bruce
ARCHITECTS
Phone: 608.836.3690
7601 University Ave, Ste 201
Middleton, WI 53562

ISSUED
Issued for LUA & UDC - September 26, 2022
Issued for Review - January 19, 2023

PROJECT TITLE
Odana Road
Site Concept

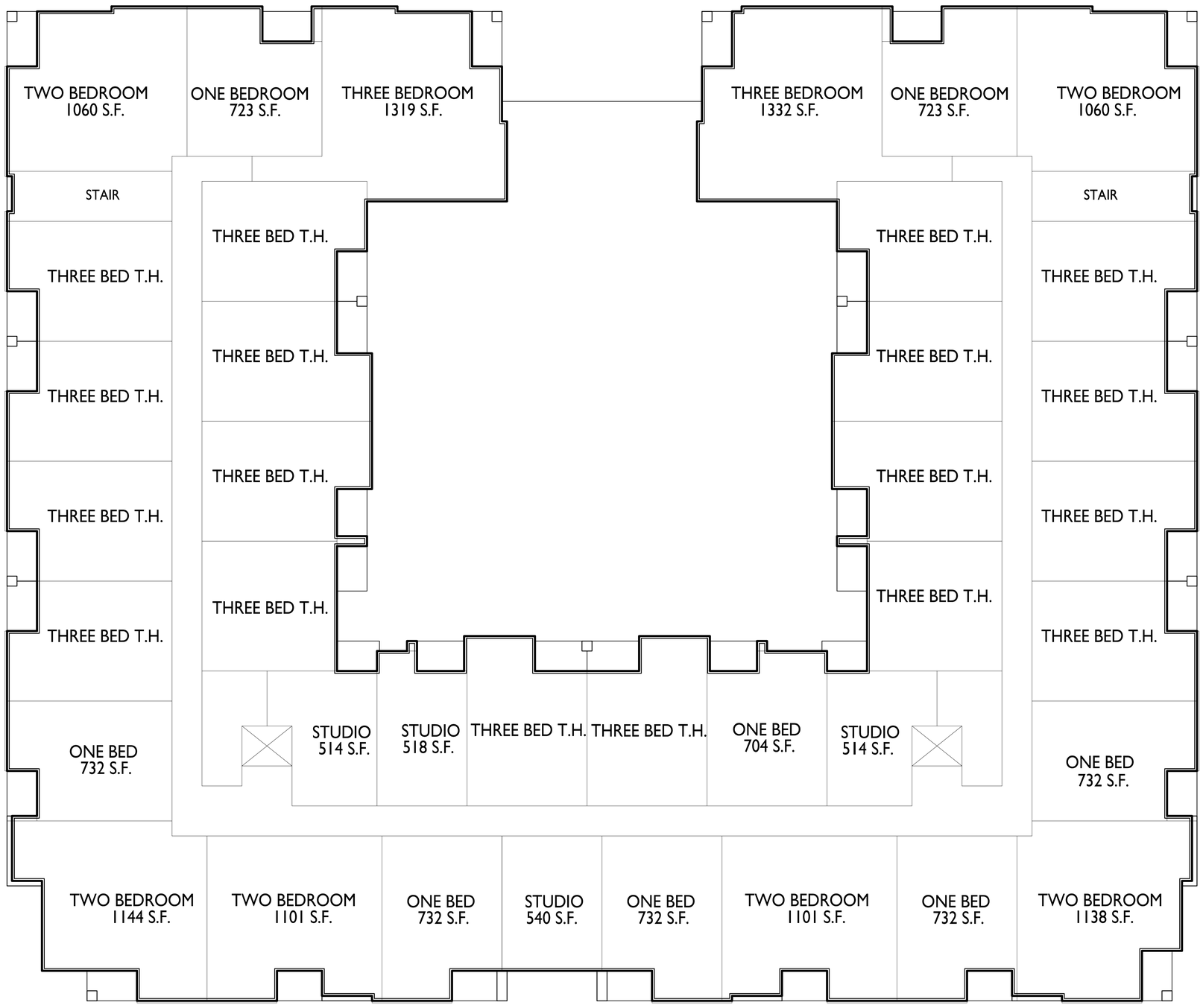
Northpointe
Development

Odana Rd, Madison

SHEET TITLE
First Floor Plan

SHEET NUMBER
A-1.1

PROJECT NO. 2233



1 A-1.2 SECOND FLOOR PLAN

3/32" = 1'-0"

knothe bruce ARCHITECTS
Phone: 608.836.3690
7601 University Ave, Ste 201
Middleton, WI 53562

ISSUED
Issued for LUA & UDC - September 26, 2022
Issued for Review - January 19, 2023

PROJECT TITLE
Odana Road
Site Concept

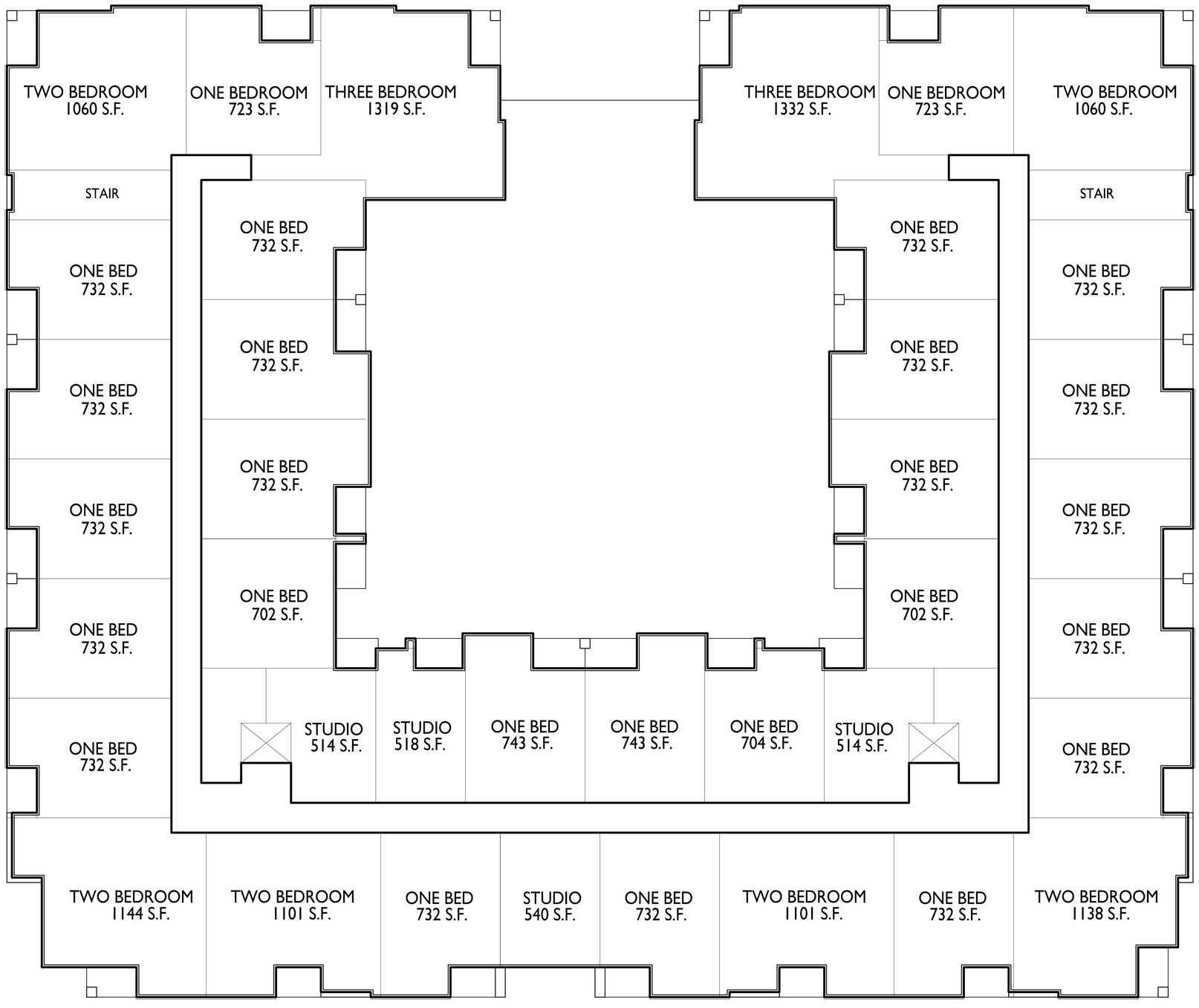
Northpointe
Development

Odana Rd, Madison

SHEET TITLE
Second Floor Plan

SHEET NUMBER
A-1.2

PROJECT NO. 2233



1 / A-1.3 THIRD FLOOR PLAN

3/32" = 1'-0"

knothe bruce ARCHITECTS
Phone: 608.836.3690
7601 University Ave, Ste 201
Middleton, WI 53562

ISSUED
Issued for LUA & UDC - September 26, 2022
Issued for Review - January 19, 2023

PROJECT TITLE
Odana Road
Site Concept

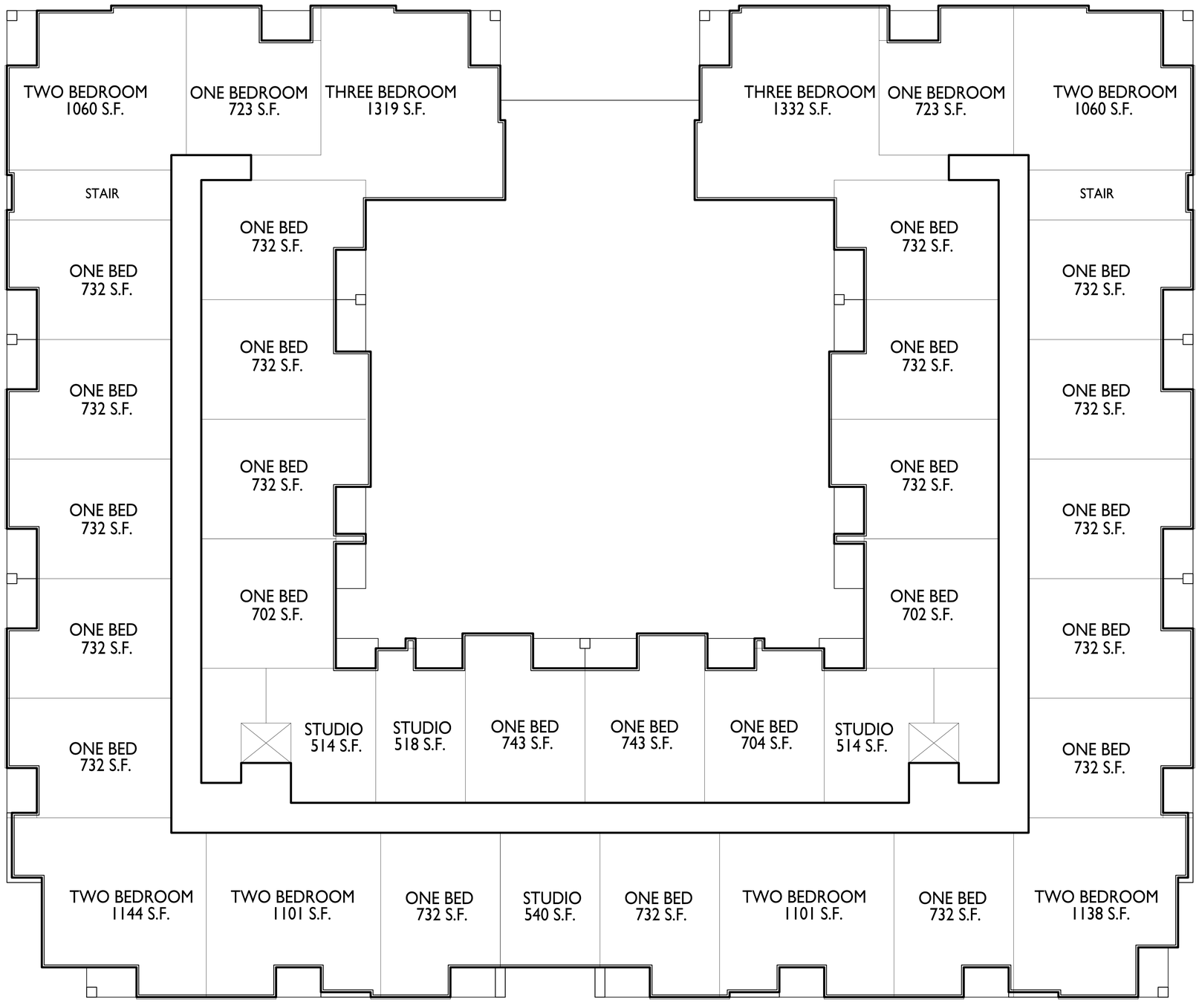
Northpointe
Development

Odana Rd, Madison

SHEET TITLE
Third Floor Plan

SHEET NUMBER
A-1.3

PROJECT NO. 2233



1 / A-1.4 FOURTH FLOOR PLAN

3/32" = 1'-0"

knothe bruce
ARCHITECTS
Phone: 608.836.3690
7601 University Ave, Ste 201
Middleton, WI 53562

ISSUED
Issued for LUA & UDC - September 26, 2022
Issued for Review - January 19, 2023

PROJECT TITLE
Odana Road
Site Concept

Northpointe
Development

Odana Rd, Madison

SHEET TITLE
Fourth Floor Plan

SHEET NUMBER
A-1.4

PROJECT NO. 2233

LOOKING NORTH

knothe bruce ARCHITECTS

LOOKING NORTH-WEST

knothe bruce ARCHITECTS

LOOKING WEST

knothe bruce ARCHITECTS

LOOKING SOUTH-WEST

knothe bruce ARCHITECTS


LOOKING SOUTH-EAST
kba
knothe bruce
ARCHITECTS

LOOKING EAST

kba
knothe bruce
ARCHITECTS

LOOKING NORTH-EAST

kba
knothe bruce
ARCHITECTS

NORTHPOINTE DEVELOPMENT
ODANA RD

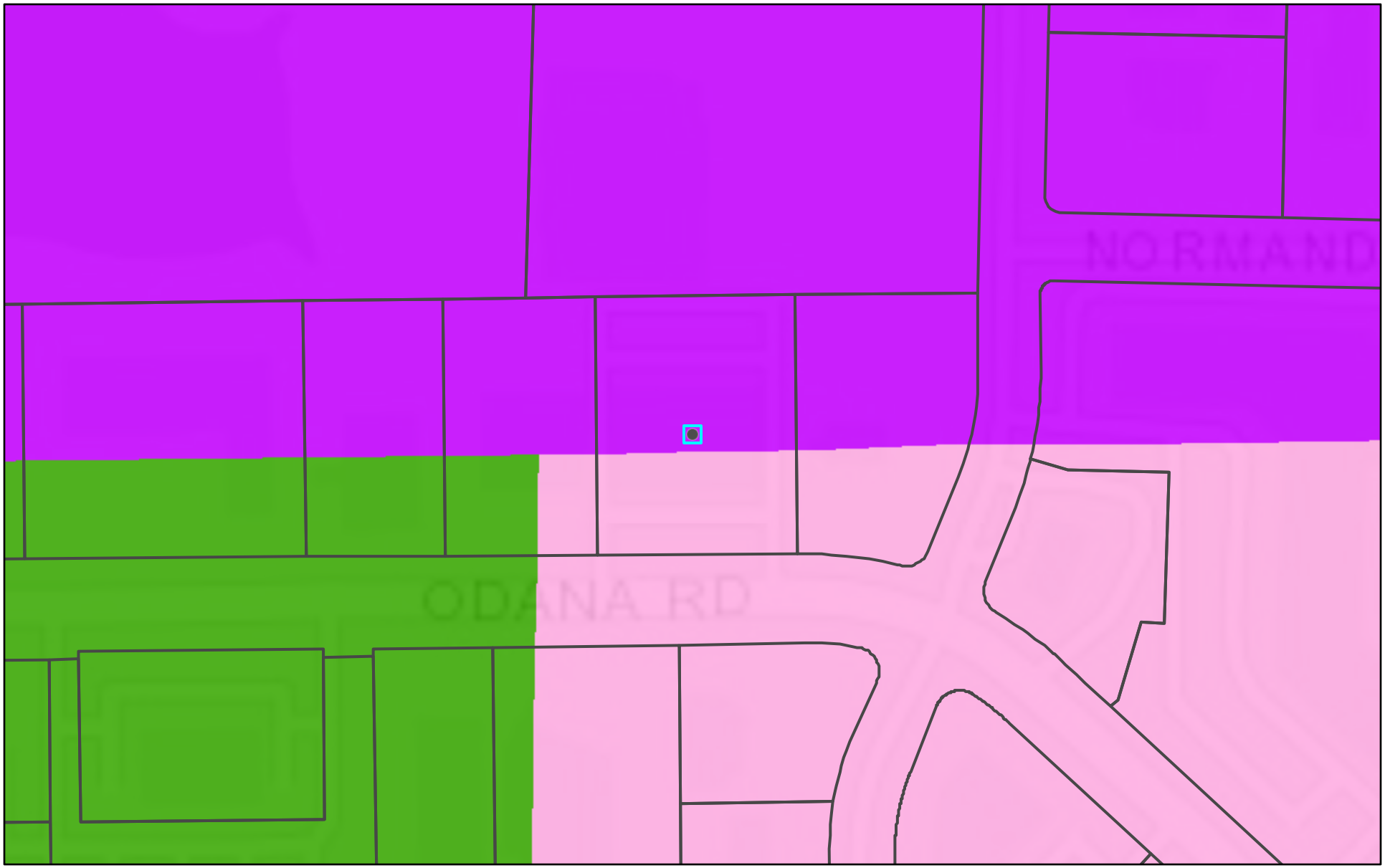
2023 Affordable Housing Targeted Area Map

- 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 Devlopment

ArcGIS Web Map



8/14/2023, 5:05:54 PM

Property_Lookup - Parcels
Eligible Core
Limited Eligibility
Preservation Rehab
Preferred TOD
Ineligible

1:2,257

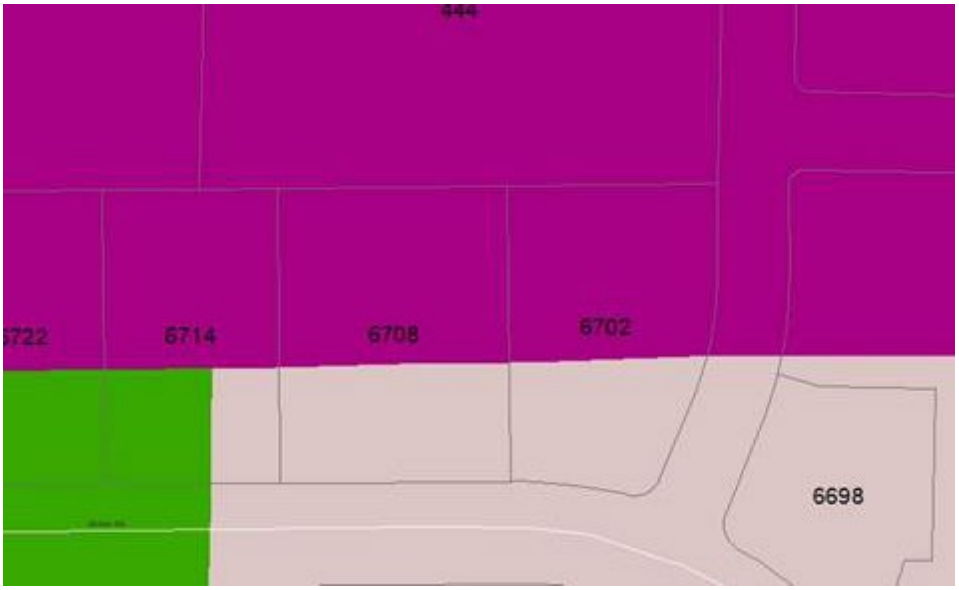
0 0.01 0.03 0.05 mi

0 0.02 0.04 0.08 km

From:	Vogt, John D.
To:	Sean O"brien; Lane Manning
Cc:	Firchow, Kevin; Kirchgatter, Jenny; Frater, Matt
Subject:	6702-6714 Odana Road
Date:	Thursday, June 23, 2022 9:34:59 AM
Attachments:	image002.png image004.png image005.png

Hi Sean,

We got a better look and we can confirm that the sites you are looking at are Preferred TOD (the new Super Preferred if looking at last year's map).



Thanks!

John

OUR **MADISON**
INCLUSIVE, INNOVATIVE & THRIVING

{ he | him | his } **John Vogt** | Community Development Specialist

Department of Planning and Community & Economic Development
Community Development Division

Madison Municipal Building | Suite 300
215 Martin Luther King, Jr. Boulevard | Madison, Wisconsin 53703-3348

Mail P.O. Box 2627 | Madison, Wisconsin 53701-2627
Tel 608 267 0742 | ***Fax*** 608 261 9661
Email jvogt@cityofmadison.com | ***Web*** cityofmadison.com/cdd

From: cnc@twgi.com on behalf of New Construction
To: Sean O"brien; Sean O"brien
Subject: Welcome to New Construction (FOE-C71D3-27087)
Date: Thursday, July 14, 2022 12:19:52 PM

Thank You

A notification of this application has been submitted.

Application Number:	**FOE-C71D3-27087**
Sponsor:	**Focus on Energy**
Program:	**New Construction**
Created By:	**Sean O'Brien on 7/14/2022 12:19:42 PM**
Project Name:	**Merchant Place Apartments**
Project Location:	**6706 Odana Road** **Madison, WI 53719**
Business Customer:	**Northpointe Development II Corporation**

Your unique application number is listed below. You can make additional modifications to the application by clicking the link below. You will be required to login or establish an account.

FOE-C71D3-27087

focus on energy®
Partnering with Wisconsin utilities

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phone: 608.230.7010
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MEMORANDUM

To: Sean O'Brien, Northpointe Development Corp

From: Stefanie Bator

Project: Focus on Energy
Energy Design Assistance
Merchant Place Apartments, Madison, WI

Project No.: 4022556

Date: September 9, 2022

Summary: The purpose of the meeting on September 7, 2022 was to review the Energy Design Assistance program and energy savings associated with the Merchant Place Apartments project. Focus on Energy presented results at the meeting.

Focus on Energy collaborates with the project team to explore and quantify alternative materials and systems with the goal of selecting design strategies that are cost effective and have the highest value. Energy analysis results are used to determine custom incentives from Focus on Energy. The project team reviewed the strategy results and associated incremental cost information provided by Focus on Energy and assembled bundles of strategies based on the current design and group discussion.

Bundle 3 WAS SELECTED as the target bundle.

Additional changes to the bundle selection can be made and will be captured during the verification phase.

Item: **Model updates and requested information**

- Owner and design team reviewed the bundles composition and made changes to reflect the current design.

Action: The above changes are now incorporated and the revised results, incentives, and paybacks are included in these minutes.

Item: **Energy Utility Service and Rates**

- Madison Gas and Electric Company, a participating Focus on Energy utility, will provide electric service for the building.
- Madison Gas and Electric Company, a participating Focus on Energy utility, will provide natural gas service for the building.
- Average electric and gas rates for the state of Wisconsin shall be used for the Design Assistance program. Actual rates may be able to be applied if provided by the project team.

Action: Bob Feller (Knothe and Bruce Architects, LLC) to provide actual rates if desired.

Item: **Owner Incentive**

The Design Assistance program provides an incentive to the owner to help reduce the upfront costs associated with the addition of energy-saving strategies evaluated and verified by the program. The owner incentive is not intended to cover all increases in construction costs.

Sean O`Brien (Northpointe Development II Corporation) was identified as the point of contact for the owner incentive.

Action: **Focus on Energy** to provide Sean O`Brien (Northpointe Development II Corporation) with the owner incentive following occupancy and program verification.

Item: **Design Team Incentive**

The Design Assistance program provides an incentive to the design team for their participation in the following activities: (1) attendance at formal meetings; (2) transfer of building architectural/engineering design information; and (3) development of applicable energy conservation strategies' incremental costs (incremental as compared to the base building design). Please note that the design team incentive is not intended to cover actual system(s) design or re-design associated with energy conservation strategies. The design team incentive will be paid out to the person identified as design team lead upon completion of the Bundle Requirements Document.

Bob Feller (Knothe and Bruce Architects, LLC) was identified as the point of contact for the design team incentive.

Action: **Focus on Energy** to provide Bob Feller (Knothe and Bruce Architects, LLC) with the design team incentive upon completion of the Bundle Requirements Document.

Item: **Verification Phase**

Verification, a process that seeks to assure that one of the bundles is implemented, will be laid out in detail in the coming weeks but will generally include 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 design team incentive and sends payment to design team lead.
- Project Team sends Construction Documents to Focus on Energy, electronic format preferred.
- Project Team sends State of Wisconsin approved COMCheck submittal to Focus on Energy.
- Project Team sends requested equipment submittals to Focus on Energy.
- Field verification of select projects of 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.

The purpose of the verification phase is to assist the project team and Focus on Energy toward realizing the energy conservation goals of the program and increasing the likelihood that the incentive proposed during the design phase is achieved upon completion of the project.

Item: **Next Steps**

Action: Upon bundle selection, **Focus on Energy** will prepare the Bundle Requirements Document.

Bundle Results Summary

Bundled Annual Savings

Bundle Description	Peak kW Savings	% Peak kW Savings	kWh Savings	% kWh Savings	Gas Savings (Therm)	% Gas Savings	Energy Cost Savings
Valued	26	14	165,180	14	19,782	27	$38,255
Proposed	33	18	221,544	19	23,897	33	$49,412
Design+	49	26	282,247	24	25,648	35	$59,505

Simple Payback with Incentive

Bundle Description	Energy Cost Savings	Incremental First Cost	Focus on Energy Electric Incentive	Focus on Energy Gas Incentive	Total Incentive	Payback in Years (after incentive)
Valued	$38,255	$271,313	$12,389	$17,210	$29,599	6.3
Proposed	$49,412	$397,841	$16,616	$20,790	$37,406	7.3
Design+	$59,505	$563,276	$21,169	$22,314	$43,483	8.7

Energy Use Intensity

Bundle Description	Energy Use Intensity (kBTU/sf/yr)
Valued	48.6
Proposed	45.3
Design+	43.2

Detailed strategy results are shown in the appendix.

Building Summary

Building Summary		
Location	Madison, WI	
Narrative	Multifamily new construction	
Space Asset Areas	Area	Number of Stories
Apartments (124)	109,938 ft²	4
Lobby, Commons, Fitness	3,227 ft²	1
Corridors	14,883 ft²	4
Commercial	4,422 ft²	1
Stairwells	2,480 ft²	4
Garage	46,263 ft²	1
Total	**181,213 ft²**	**5**
Exterior lighting	Parking: 18,694 ft²	
Systems Summary		
Envelope	Wood wall and roof construction: R-21 for the wall, R-40 for the roof	
Glazing	Non-metal frames aluminum frame or storefront at Lobby and Commercial areas: U-value: 0.27, argon	
Lighting	LED throughout	
Plug/Process	Energy Star Appliances	
Service Water Heating	95% Gas-fired storage tanks (centralized)	
Snow Melt	N/A	
Hours of Operation	Typical residential hours (24/7)	
HVAC	**Apartment:** 95% gas-fired furnaces and DX cooling **Lobby, Commons, Fitness, Corridors:** 95% gas-fired furnaces and DX cooling **Commercial:** 95% Gas-fired Furnaces (no cooling) **Stairwells:** Electric wall unit heaters **Garage:** 80% gas-fired unit heaters	
Utilities		
Electric Utility	Madison Gas and Electric Company	
Gas Utility	Madison Gas and Electric Company	
Schedule		
Construction Documents Complete	08/01/2023	
Construction Start	05/01/2024	
Occupancy	06/01/2025	
Baseline Reference	ASHRAE 90.1-2013 Appendix G	
Other Notes		

Appendix A. Detailed Strategy Results

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Mechanical									
Apartments									
Electronically commutated motor	1	9,539	-188	$1,252	$14,135	11.3		x	x
5% improved DX cooling efficiency	2.6	6,478	0	$943	$20,387	21.6			
10% improved DX cooling efficiency	5	12,387	0	$1,801	$40,773	22.6			
20% improved DX cooling efficiency	9.2	22,697	0	$3,303	$81,547	24.7			x
30% improved DX cooling efficiency	12.8	31,431	0	$4,571	$122,320	26.8			
82% efficient gas furnace	0	0	491	$353	$3,142	8.9			
90% efficient gas furnace	0	0	2,234	$1,605	$17,320	10.8			
95% efficient gas furnace	0	0	3,174	$2,283	$26,182	11.5		x	x
Programmable thermostats for Apartments	0.1	3,441	1,570	$1,631	$3,495	2.1	x	x	
Smart thermostats for Apartments	6.7	29,502	2,368	$5,994	$22,038	3.7			x
Lobby, Commons, Fitness, Corridors									
Electronically commutated motor	2.1	13,520	-222	$1,808	$2,328	1.3		x	x
5% improved DX cooling efficiency	0.5	714	0	$104	$3,358	32.3			
10% improved DX cooling efficiency	0.9	1,354	0	$197	$6,717	34.1			
20% improved DX cooling efficiency	1.7	2,454	0	$356	$13,433	37.7			x
30% improved DX cooling efficiency	2.3	3,352	0	$488	$20,150	41.3			
82% efficient gas furnace	0	0	88	$64	$518	8.1			
90% efficient gas furnace	0	0	401	$289	$2,853	9.9			
95% efficient gas furnace	0	0	571	$411	$4,313	10.5		x	x
Commercial									
Electronically commutated motor	0	367	-6	$48	$569	11.8		x	x
82% efficient gas furnace	0	0	12	$9	$126	14.0			
90% efficient gas furnace	0	0	55	$39	$697	17.9			
95% efficient gas furnace	0	0	78	$56	$1,053	18.8		x	x
Garage									
82% efficient gas furnace	0	0	869	$625	$1,322	2.1			
90% efficient gas furnace	0	0	3,955	$2,841	$7,289	2.6			
95% efficient gas furnace	0	0	5,621	$4,042	$11,018	2.7			
CO sensor control of outdoor air	0	20,682	12,255	$11,816	$4,626	0.4	x	x	x
Architectural									
Apartments									
Wall R-16	0	-23	115	$80	$1,230	15.4	x		

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Wall R-20	0.4	-266	1,072	$735	$14,353	19.5		x	
Wall R-24	0.6	-441	1,705	$1,162	$27,475	23.6			x
Roof R-24	0.2	58	448	$333	$7,212	21.7			
Roof R-30	0.4	121	1,034	$762	$20,877	27.4			
Roof R-36	0.5	139	1,421	$1,043	$34,542	33.1	x		
Roof R-40	0.6	128	1,614	$1,181	$43,653	37.0		x	
Roof R-50	0.7	127	1,959	$1,428	$66,428	46.5			x
Roof R-60	0.8	132	2,187	$1,591	$89,203	56.1			
White roof	1.6	3,710	-321	$308	$498	1.6			
Glazing high solar gain w/ argon, non-metal frame	1	-652	2,720	$1,862	$3,133	1.7			
Glazing medium solar gain, high transparency w/ argon, non-metal frame	4.5	10,119	1,902	$2,838	$13,683	4.8			
Glazing medium solar gain w/ argon, non-metal frame	4.5	10,119	1,902	$2,838	$8,408	3.0	x	x	x
Glazing low solar gain w/ argon, non-metal frame	8.9	22,834	754	$3,864	$8,408	2.2			
10% window to wall area ratio	9.3	22,054	2,426	$4,954	$0	0.0			
20% window to wall area ratio	2.6	6,286	708	$1,427	$0	0.0			
Lobby, Commons, Fitness									
Wall R-16	0	5	5	$3	$60	20.1	x		
Wall R-20	0	39	47	$38	$703	18.5		x	
Wall R-24	0	62	75	$61	$1,346	22.1			x
Glazing high solar gain w/ argon, metal frame	0.1	163	21	$41	$154	3.7			
Glazing medium solar gain, high transparency w/ argon, metal frame	0.2	368	-22	$39	$670	17.2			
Glazing medium solar gain w/ argon, metal frame	0.2	277	-20	$26	$412	15.8			
Glazing high solar gain triple pane w/ argon, metal frame	0.1	300	113	$126	$5,478	43.5	x	x	x
Glazing medium solar gain, high transparency triple pane w/ argon, metal frame	0.3	468	77	$126	$5,995	47.6			
Glazing medium solar gain triple pane w/ argon, metal frame	0.3	391	74	$111	$5,736	51.7			
Glazing low solar gain triple pane w/ argon, metal frame	0.4	366	23	$70	$5,736	81.9			
10% window to wall area ratio	0.4	420	102	$135	$0	0.0			
20% window to wall area ratio	0.1	3	33	$23	$0	0.0			
Corridors									
Roof R-24	0	57	54	$49	$976	19.9			
Roof R-30	0	120	124	$108	$2,827	26.2			
Roof R-36	0.1	161	171	$148	$4,677	31.6	x		
Roof R-40	0.1	182	194	$165	$5,910	35.8		x	
Roof R-50	0.1	213	235	$200	$8,994	45.0			x
Roof R-60	0.1	236	262	$224	$12,077	53.9			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Commercial									
Wall R-16	0	1	1	$1	$33	33.2	x		
Wall R-20	0	12	11	$9	$388	43.1		x	
Wall R-24	0	16	18	$14	$742	53.0			x
Glazing high solar gain triple pane w/ argon, metal frame	0	36	43	$36	$6,375	100+	x	x	x
Stairwells									
Wall R-16	0	105	0	$14	$49	3.5	x		
Wall R-20	0	971	0	$140	$573	4.1		x	
Wall R-24	0	1,535	0	$223	$1,097	4.9			x
Roof R-24	0	179	0	$25	$130	5.2			
Roof R-30	0	412	0	$60	$377	6.3			
Roof R-36	0	567	0	$80	$623	7.8	x		
Roof R-40	0	643	0	$91	$788	8.7		x	
Roof R-50	0	781	0	$114	$1,199	10.5			x
Roof R-60	0	873	0	$126	$1,610	12.8			
Garage									
Wall R-16	0	0	39	$29	$774	26.7		x	x
Lighting									
Facility									
Exterior tradable site lighting reduced to 2.36 kW	0	1,147	0	$169	$397	2.4			
Exterior tradable site lighting reduced to 2.10 kW	0	2,295	0	$334	$795	2.4	x		
Exterior tradable site lighting reduced to 1.83 kW	0	3,442	0	$499	$1,192	2.4		x	
Exterior tradable site lighting reduced to 1.57 kW	0	4,589	0	$668	$1,590	2.4			x
Exterior tradable site lighting reduced to 1.31 kW	0	5,737	0	$832	$1,987	2.4			
Exterior tradable site lighting reduced to 1.05 kW	0	6,883	0	$1,002	$2,384	2.4			
Exterior tradable site lighting reduced to 0.79 kW	0	8,031	0	$1,169	$2,782	2.4			
Exterior tradable site lighting reduced to 0.52 kW	0	9,178	0	$1,336	$3,179	2.4			
Apartments									
Lighting power in Apartments reduced to 0.96 W/ft²	0.6	11,402	-209	$1,507	$7,341	4.9			
Lighting power in Apartments reduced to 0.86 W/ft²	1.3	22,855	-421	$3,023	$14,687	4.9	x		
Lighting power in Apartments reduced to 0.75 W/ft²	2	34,332	-634	$4,541	$21,560	4.7		x	
Lighting power in Apartments reduced to 0.64 W/ft²	2.7	45,784	-848	$6,053	$27,962	4.6			x
Lighting power in Apartments reduced to 0.54 W/ft²	3.5	57,270	-1,064	$7,567	$33,892	4.5			
Lighting power in Apartments reduced to 0.43 W/ft²	4.2	68,757	-1,282	$9,084	$39,350	4.3			
Lobby, Commons, Fitness									
Occupancy sensor controls, 25% of space	0	365	-7	$48	$151	3.1			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Occupancy sensor controls, 50% of space	0.1	734	-15	$96	$302	3.1	x		
Occupancy sensor controls, 75% of space	0.1	1,102	-22	$146	$453	3.1		x	x
Occupancy sensor controls, 100% of space	0.2	1,466	-30	$192	$604	3.1			
Vacancy sensor controls, 75% of space	0.2	1,276	-26	$167	$453	2.7			
Vacancy sensor controls, 100% of space	0.2	1,701	-35	$223	$604	2.7			
Lighting power in Lobby, Commons, Fitness reduced to 0.46 W/ft²	0.1	466	-9	$61	$215	3.5			
Lighting power in Lobby, Commons, Fitness reduced to 0.41 W/ft²	0.2	937	-18	$125	$431	3.4	x		
Lighting power in Lobby, Commons, Fitness reduced to 0.36 W/ft²	0.2	1,404	-28	$185	$633	3.4		x	
Lighting power in Lobby, Commons, Fitness reduced to 0.31 W/ft²	0.3	1,870	-37	$246	$821	3.3			x
Lighting power in Lobby, Commons, Fitness reduced to 0.26 W/ft²	0.4	2,341	-46	$308	$995	3.2			
Corridors									
Occupancy sensor controls, 25% of space	0.2	2,286	-37	$305	$696	2.3	x		
Occupancy sensor controls, 50% of space	0.5	4,565	-74	$610	$1,393	2.3		x	x
Occupancy sensor controls, 75% of space	0.7	6,796	-112	$906	$2,089	2.3			
Occupancy sensor controls, 100% of space	0.9	8,062	-132	$1,078	$2,785	2.6			
Lighting power in Corridors reduced to 0.46 W/ft²	0.4	2,828	-45	$380	$994	2.6			
Lighting power in Corridors reduced to 0.41 W/ft²	0.8	5,658	-91	$758	$1,988	2.6	x		
Lighting power in Corridors reduced to 0.36 W/ft²	1.2	8,483	-138	$1,136	$2,919	2.6		x	
Lighting power in Corridors reduced to 0.31 W/ft²	1.7	11,310	-186	$1,512	$3,785	2.5			x
Lighting power in Corridors reduced to 0.26 W/ft²	2.1	14,138	-235	$1,888	$4,588	2.4			
Stairwells									
Occupancy sensor controls, 25% of space	0	179	0	$26	$116	4.5	x		
Occupancy sensor controls, 50% of space	0.1	354	0	$50	$232	4.6		x	x
Occupancy sensor controls, 75% of space	0.1	530	0	$76	$348	4.6			
Occupancy sensor controls, 100% of space	0.2	704	0	$102	$464	4.6			
Lighting power in Stairwells reduced to 0.46 W/ft²	0.1	241	0	$36	$166	4.6			
Lighting power in Stairwells reduced to 0.41 W/ft²	0.2	481	0	$69	$331	4.8	x		
Lighting power in Stairwells reduced to 0.36 W/ft²	0.2	714	0	$104	$486	4.7		x	
Lighting power in Stairwells reduced to 0.31 W/ft²	0.3	949	0	$136	$631	4.6			x

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Lighting power in Stairwells reduced to 0.26 W/ft²	0.4	1,184	0	$171	$765	4.5			
Garage									
Occupancy sensor controls, 50% of space	0.5	4,964	-62	$679	$1,732	2.6		x	x
Occupancy sensor controls, 75% of space	1.1	11,169	-141	$1,524	$3,896	2.6			
Occupancy sensor controls, 100% of space	1.7	17,375	-222	$2,368	$6,061	2.6			
Lighting power in Garage reduced to 0.19 W/ft²	0.9	6,347	-79	$868	$3,089	3.6			
Lighting power in Garage reduced to 0.17 W/ft²	1.8	12,695	-160	$1,729	$6,180	3.6	x		
Lighting power in Garage reduced to 0.15 W/ft²	2.7	19,042	-243	$2,598	$9,073	3.5		x	
Lighting power in Garage reduced to 0.13 W/ft²	3.6	25,390	-326	$3,459	$11,767	3.4			x
Lighting power in Garage reduced to 0.11 W/ft²	4.5	31,737	-412	$4,324	$14,262	3.3			
Lighting power in Garage reduced to 0.08 W/ft²	5.4	38,084	-502	$5,179	$16,559	3.2			
Lighting power in Garage reduced to 0.06 W/ft²	6.3	44,432	-592	$6,039	$18,657	3.1			
Plug/Process									
Facility									
Traction elevator, gearless	0.5	2,051	0	$298	$26,509	89.0			
Traction elevator, machine roomless	1	4,307	0	$627	$35,547	56.7		x	x
Traction elevator, regenerative	1.4	5,785	0	$840	$92,783	100+			
Elevator permanent magnet motor	0.2	744	0	$110	$33,137	100+			
Apartments									
Clothes washers, ENERGY STAR minimum certification efficiency	4.5	32,988	-355	$4,543	$18,395	4.0	x	x	x
Clothes dryers, ENERGY STAR minimum certification efficiency	0.6	4,496	-58	$612	$36,791	60.1	x	x	x
Dishwashers, ENERGY STAR premium efficiency	0.4	3,060	284	$647	$122,636	100+	x	x	x
Refrigerators, ENERGY STAR minimum certification efficiency	1.2	9,235	-120	$1,258	$42,923	34.1	x	x	x
Service Water Heating									
Facility									
90% SWH efficiency	0	0	1,780	$1,279	$4,660	3.6	x		
95% SWH efficiency	0	0	2,434	$1,750	$6,990	4.0		x	x
Apartments									
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	1,475	$1,060	$368	0.3			
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	2,212	$1,591	$785	0.5	x	x	
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	2,949	$2,120	$1,091	0.5			x

Appendix B. Key Model Inputs

Utility Rates

Fuel	Utility	Conversion factor	Rate
Electric	Madison Gas and Electric Company	n/a	Average rate: $0.1455per kWh $/kWh
Gas	Madison Gas and Electric Company	n/a	Average rate: $0.72per therm $/therm

Copies:

Attendees shown in **bold**.

Name	Company	Email	Phone
Sean O'Brien	Northpointe Development Corp	sean@northpointedev.com	608.334.5665
Bob Feller	Knothe and Bruce Architects, LLC	bfeller@knothebruce.com	608.836.3690
Nic Sell	Dave Jones, Inc	nsell@davejonesinc.com	608.222.8490
John Medenwald	Connery Construction, Inc.	johnm@conneryconstruction.com	
Lane Manning	Dream Lane Real Estate	lane@dreamlanere.com	
Darin Aguilar	Focus on Energy	daguilar@willdan.com	952.939.1804
Stefanie Bator	Focus on Energy	sbator@willdan.com	858.292.1840

FULL SPECTRUM SOLAR

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info@fullspectrumsolar.com
www.fullspectrumsolar.com

Installation & Repair - Commercial & Residential - New Construction & Retrofit - Solar Electric & Solar Thermal

ESTIMATE

CUSTOMER INFO
Sean O'brien
Developer
Northpointe Development
Odana Apartments

QUOTE #	DATE
ODANA071522	7/15/2022
CUSTOMER ID	**VALID UNTIL**

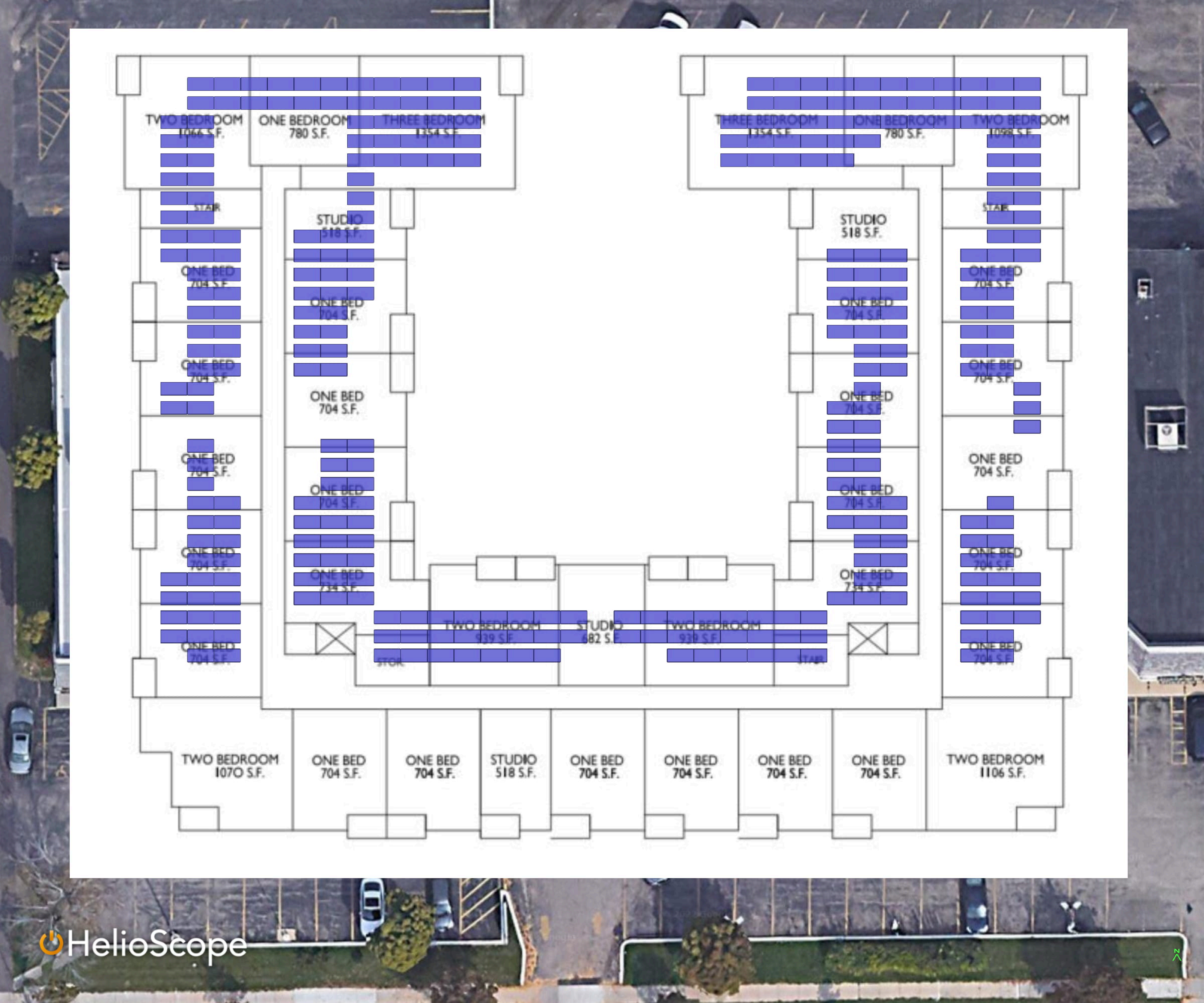
Prepared By: Burke O'Neal

DESCRIPTION OF WORK / EXCLUSIONS

Install a 134 kW (peak DC) minimum photovoltaic system with 96 kW (AC) Fronius or SMA inverter capacity with module-level rapid shutdown. **Exclusions**: 1) Any required roof reinforcements to support array, 2) Provision of a properly placed backfeed breaker in switchgear properly designed to accept solar backfeed, 3) EMT conduit from basement in the vicinity of inverters up through the roof, 4) Ethernet cable for internet connection to the inverters (WIFI connection is a possible alternative if there is a strong signal to inverters, but less reliable).

PRIMARY EQUIPMENT	QTY	UNIT PRICE	AMOUNT
134 kW Min PV system with the following major equipment	1		$278,250
134 kW Jinko 410 made in the U.S. or the same or better efficiency/warranty module, 400 W Min each	1		-
96 kW (AC) Fronius or SMA inverter capacity w/ monitoring	1		-
SMA or APSystems rapid shutdown devices	1		-
IronRidge or Unirac ballasted racking	1		
Concrete ballast as specified by IronRidge or Unirac	1		-
Wire, conduit, fittings, support, electrical hardware, etc.	1		-
Exterior mounted lockable utility disconnect	1		-
5 year workmanship warranty in addition to product warranties	1		-
Handling of Focus on Energy paperwork, permits, assistance with grant applications as needed	1		-
Thank you for your business!		**SUBTOTAL**	**$278,250**
		OTHER	**-**
		TOTAL QUOTE	**$ 278,250.00**

Estimated energy production: 154,000 kWh per year
Estimated incentives: 26% federal tax credit (2022 level), $16,400 Focus on Energy, $10,000 MadiSUN business grant, accelerated depreciation with 87% of total cost as basis.


TWO BEDROOM 1066 S.F.
ONE BEDROOM 780 S.F.
THREE BEDROOM 1354 S.F.
THREE BEDROOM 1354 S.F.
ONE BEDROOM 780 S.F.
TWO BEDROOM 1098 S.F.
STAIR
STUDIO 518 S.F.
STUDIO 518 S.F.
STAIR
ONE BED 704 S.F.
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ONE BED 704 S.F.
ONE BED 704 S.F.
TWO BEDROOM 939 S.F.
STUDIO 682 S.F.
TWO BEDROOM 939 S.F.
STOR
STAIR
TWO BEDROOM 1070 S.F.
ONE BED 704 S.F.
ONE BED 704 S.F.
STUDIO 518 S.F.
ONE BED 704 S.F.
ONE BED 704 S.F.
ONE BED 704 S.F.
ONE BED 704 S.F.
TWO BEDROOM 1106 S.F.
HelioScope

From: Kirchgatter, Jenny
To: Sean O"brien
Cc: Tucker, Matthew
Subject: RE: 6706-6714 Odana Road
Date: Monday, July 18, 2022 9:22:58 AM

Hi Sean,

6706 and 6714 Odana Rd are currently zoned CC (Commercial Center) district. Dwelling units in a mixed-use building is an allowed use with Conditional Use approval from the Plan Commission. Let me know if you need anything further. If you have a letter drafted, I can review it.

Jenny Kirchgatter
Assistant Zoning Administrator

(608) 266-4429
jkirchgatter@cityofmadison.com

https://www.cityofmadison.com/dpced/bi/coronavirus/3393/
https://www.cityofmadison.com/health-safety/coronavirus

From: Sean O'brien <sean@northpointedev.com>
Sent: Monday, July 18, 2022 9:06 AM
To: Kirchgatter, Jenny <JKirchgatter@cityofmadison.com>
Subject: 6706-6714 Odana Road

Jenny,

We are submitting our application today to CDD for the Madison Affordable Housing Funds. I just realized that we needed a letter from zoning saying that permissive is in place or the process to obtain zoning approvals. Can you confirm that our site is currently zoned CC and our project can be built under current zoning with a conditional use? The main limiting factor to staying in current zoning is greenspace per unit- which we are reviewing and if we need to switch zoning we could always switch to CC-T. Thanks much.

Sean O'Brien
Northpointe Development
2628 Saw Tooth Drive
Fitchburg WI 53711

Department of Planning & Community & Economic Development
Building Inspection Division
Madison Municipal Building, Suite 017
215 Martin Luther King Jr. Blvd.
P.O. Box 2984
Madison, Wisconsin 53701-2984
Phone: (608) 266-4551
Fax (608) 266-6377
www.cityofmadison.com

January 10, 2023

Sean O'Brien
230 Ohio Street STE 200
Oshkosh WI 54902

Re: Merchant Place Apartments / Mixed-Use Building with 124 Apartments at 6706-6714 Odana Rd.

Dear Sean O'Brien:

You have requested information relative to the zoning for the four-story, mixed-use building with approximately 4,800 sq. ft. of commercial space and 124 apartments that your organization is proposing to build at 6706-6714 Odana Rd.

The property lies within the CC Commercial Center Zoning District, within which *dwelling units in a mixed-use building* are a Conditional Use. The project also requires approval of the demolition of any principal structures that you may wish to raze to accommodate the redevelopment.

At its regular meeting on November 7, 2022, the Plan Commission of the City of Madison approved the Conditional Use that will allow for the development and construction of a four-story, mixed-use building with approximately 4,800 sq. ft. of commercial space and 124 apartments and the demolition of any principal structures required for the proposed development.

Your proposal also includes 1,000 square feet of commercial space for Middleton Outreach Ministry, which WHEDA calls a Community Service Facility, defined as "any facility designed to serve primarily individuals whose income is 60 percent or less of area median income." Madison's zoning code would classify this use as a *Counseling, community services organization*, which is a Permitted Use in the CC Commercial Center Zoning District

You may proceed with the steps necessary to finalize the approval and secure building and development permits. If you have any questions in regard to this letter, please feel free to contact me at kbannon@cityofmadison.com or (608) 266-4551.

Sincerely,

Katie Bannon, AICP
Zoning Administrator

From: Slack, Kristen
To: Sean O"brien
Subject: Re: Merchant Place Apartments
Date: Tuesday, August 8, 2023 1:14:14 PM

Thanks for this summary, Sean. I have no concerns and don't think we need another neighborhood meeting for this project.

Best,

kristi

Alder Kristen Slack, 19th District, Madison, WI
district19@cityofmadison.com
608-571-5749 (cell)
Subscribe to my blog: http://www.cityofmadison.com/council/district19/blog/

From: Sean O'brien <sean@northpointedev.com>
Sent: Tuesday, August 8, 2023 11:06 AM
To: Slack, Kristen
Subject: Merchant Place Apartments

Hello Alder Slack,

Thanks for taking the time to meet with me yesterday to discuss our Merchant Place Apartments, our 124 workforce housing project located at 6706 Odana Road. As discussed we already have entitlements in place as Planning Commission approved our conditional use request unanimously last year. We applied and were successful in obtaining the City's affordable housing funds last year, however; we were unfortunately not awarded tax credits from WHEDA. Our intent is to reapply for City of Madison funds as well as WHEDA tax credits. The project will be similar to what we submitted last year except for last year we had units set aside for households earning 30, 50, and 80% of county median income. This year we will have units set aside at 30, 50, 60, and 80% of county median income. I communicated with city CDD staff this morning and they asked me to follow up with you via email for the application. CDD requested that I get two things from you if possible.

- Please confirm your position on the project
- Please confirm that you are good with us not doing another neighborhood meeting.

Regarding the neighborhood meeting- this is the information that we included in our application last year.

"We held our neighborhood meeting on August 10th with the development team, city staff, and Alder Furman in attendance. We only had a few citizens attend the meeting and the questions were more general in nature. People were interested in the green features, retail component, and overall believe that Madison needs more housing. We didn't hear any concerns about our proposed plan for the site. "

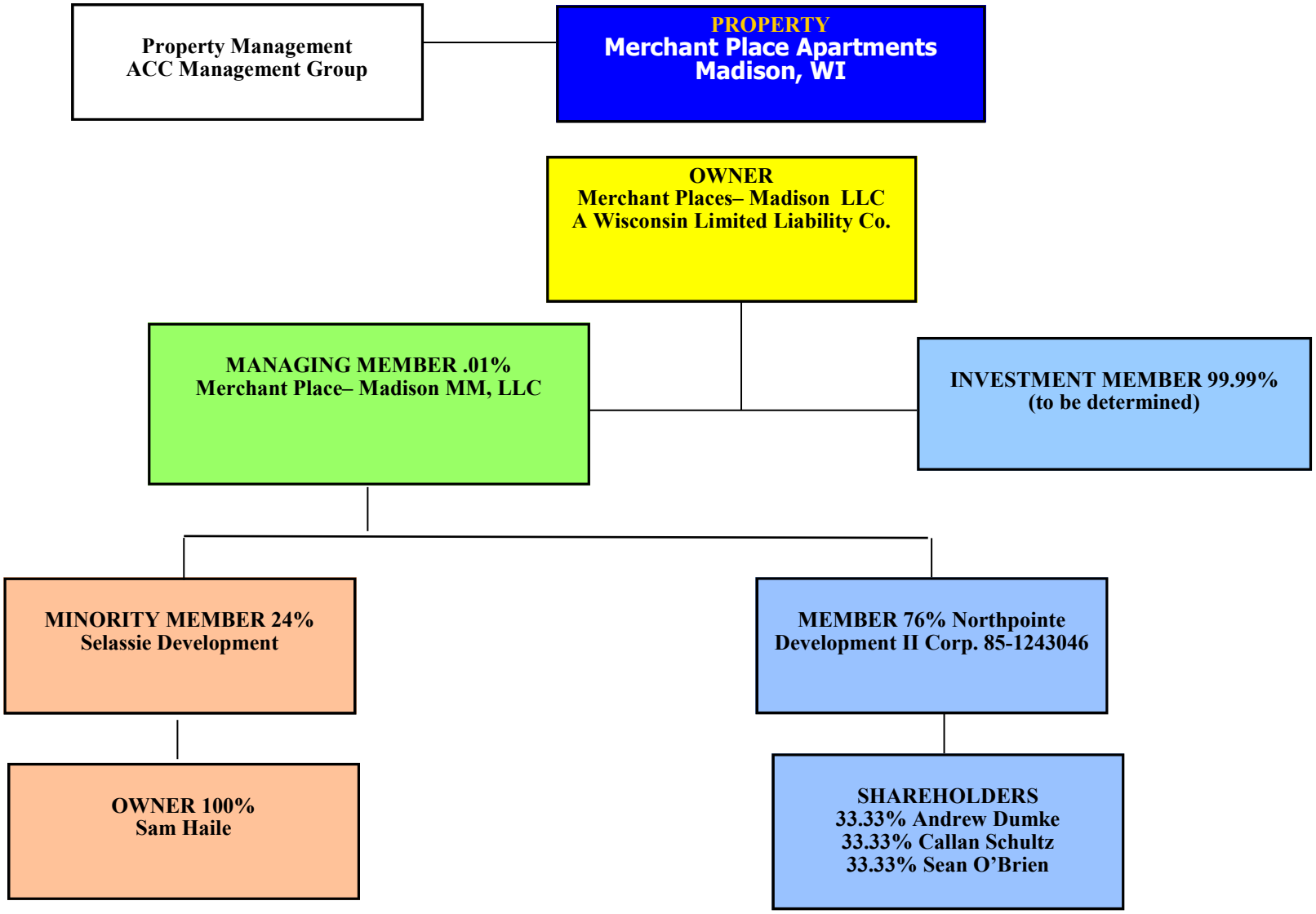
In addition to not hearing concerns at the neighborhood meeting we also didn't have anyone oppose the project at Plan Commission so it passed on consent agenda.

Please let me know if you have any questions or concerns.

Thanks again,

Sean O'Brien
Northpointe Development

OWNERSHIP STRUCTURE



MEMORANDUM OF UNDERSTANDING BETWEEN NORTHPOINTE DEVELOPMENT II CORPORATION AND MIDDLETON OUTREACH MINISTRY, INC.

This MEMORANDUM OF UNDERSTANDING (this "**MOU**") is hereby made and entered into by and between MOM Middleton Outreach Ministry (hereinafter "**Non-Profit**") and Northpointe Development II Corporation (hereinafter "**Developer**").

PURPOSE:

The purpose of this MOU is to develop a framework of cooperation between Non-Profit and Developer that will lead to the use of an approximately 1000 sq ft Commercial "**Community Service Facility**" incorporated into a 124-unit Affordable Housing apartment development located at 6706-6714 Odana Road, Madison WI (the "**Project**"). The Developer will construct the Project, which will be financed in part by low-income housing tax credits allocated by Wisconsin Housing and Economic Development Authority. 124 of the 124 units will be deemed affordable and rent restricted to households earning 30-80% of the County's Median Income for a period of 30 years. Non-Profit agrees to provide access to food security and housing stability services to low-income households in both the building and in the community, per the organizations already existing service-area and income requirements. The Community Service Facility will be used as a meeting space, case management office, and food pantry.

STATEMENT OF MUTUAL BENEFIT AND INTERESTS

Non-Profit represents and warrants that the service coordination described in this MOU conforms with their organization's mission and purpose and that the level of service coordination they intend to provide is adequate for the residents and other low to moderate households in the community to utilize their services. Non-Profit is a 501c3 that brings their community together to create food and housing security through action and advocacy. Because what we eat, where we live and our connection to community are key determinants of well-being and health, MOM focuses on providing access to these resources for people in our community. MOM hosts one of the largest food pantries in Dane County and provides case management, referrals, and housing stability assistance. The Seniors Program provides ride and chore assistance. MOM serves over 4,000 individuals each year.

Developer represents and warrants that Non-Profit's participation in this transaction will benefit the Project and allow tenants to maintain housing, connect tenants to services and improve the tenant's quality of life.

STATEMENT OF UNDERSTANDING

A) **Non-Profit:**

A designated Service Coordinator will be responsible for linking the Residents and Low income members of community with the site for use. Specific services to be offered under this agreement include:

1) Provide on-site service coordination and case management services as needed basis for the residents of the building.
2) Provide other services directly on-site that meet the needs of all low-income residents (both onsite and in the community, per the Non- Profit's own organizational guidelines) including:
  (a) Housing Case Management
  (b) Food Pantry / Emergency food access
  (c) Resource Referrals
3) All services provided will be at no cost to the tenants or low-income members of the community.
4) Services will be available and provided throughout the year.
5) Non-Profit would be responsible for furnishings, equity, and for maintaining space
6) Any exterior signage installed by Non-profit would have to be approved by Developer and Park Towne Management Company.
7) Non- Profit agrees to keep space clean and in good physical condition.
8) Non- Profit agrees to pay all on-going operating expenses incurred by their space.

B) **DEVELOPER:**

1) Develop the Project and offer a space for use by Non-Profit.
2) Provide necessary electrical service to the unit including capacity for commercial refrigeration.
3) Provide buildout of space that includes walls, two offices, flooring and lighting similar to building. Non-profit can request changes that would be approved by Developer but paid by Non-profit.
4) Execute a lease with Non-Profit for commercial space for $1 annually for 10 years or time required by the Tax Credit program.
5) Confirms that Developer has consulted with a tax accountant and that the relationship with Non-Profit meets all IRS requirements to qualify as a Community Service Facility.

IT IS MUTUALLY UNDERSTOOD AND AGREED BY AND BETWEEN THE PARTIES THAT:

LEASED SPACE. Approximately 1000 sq feet, located in a separate and stand-alone area of the apartment building, as shown on the attached site plan, will be improved by Developer and leased to Non-Profit for $1 annually for a minimum of 10 years. This area will be used to primarily serve low to moderate income members defined as households at or below 60% of the Dane County Median income, and include office, case management, and food pantry space.

MODIFICATION. Modifications within the scope of the instrument shall be made by mutual consent of the parties, by the issuance of a written modification, signed and dated by all parties, prior to any changes being performed.

PARTICIPATION IN SIMILAR ACTIVITIES. This instrument in no way restricts Non-Profit or Developer from participating in similar activities with other public or private agencies, organizations, and individuals. However, both parties to this agreement acknowledge a desire to maintain strong working relationships in the future, to consider future partnership opportunities, and to discuss partnership opportunities that they believe may be of interest to the other party.

FEE CERTIFICATION STATEMENT. Any fees charged for the services provided in the facility must by affordable to persons at or below the 60% income level; however, as stated above all services will be provided at no cost.

PRINCIPAL CONTACTS. The principal contacts for this instrument are:

NON-PROFIT
Ellen Carlson
Executive Director
Phone: 608-826-3417
Email: Ellen@momhelps.org

DEVELOPER
Sean O'Brien
Secretary
Phone: 608-334-5665
Email: sean@northpointedev.com

IN WITNESS WHEREOF, the parties hereto have executed this MOU as of the first date set forth above.

Middleton Outreach Ministry, INC	Northpointe Development II Corporation
Ellen Carlson Executive Director	Sean O'Brien, Secretary

2023 Affordable Housing Fund-Tax Credit RFP
Supplemental Application Questions

Northpointe
Merchant Place 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. Please cc: jspears@cityofmadison.com. We ask that you refrain from submitting additional documentation not specifically requested at this time or using alternative formats.

Questions:

A. 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.** See attached
    b. **What percentage of projected Energy Use Intensity (EUI) savings calculated over the baseline energy code is anticipated? (Note: 20% required.)** The EUI is anticipated to be 43.5 based on the design bundle selected. The baseline for multifamily housing according is 59.6 a reduction of over 27%
    c. **What is the highest feasible Bundle Level to which this project can commit?** We have committed to Bundle Level 3- the highest Bundle Level.

B. 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 -** The project is an infill site on a major thoroughfare. The site is very walkability to amenities, jobs, public transportation, bike paths. We will incorporate both indoor and outdoor play areas into our plan and all units will have walkout access or balconies. The parking will be mostly hidden underground where we will also have bike parking. Additional bike parking will be provided outside of the building. We added an easement to our site plan to allow for a future bike path to be installed to the north of the property connecting tenants directly to Mineral Point Road and the BRT line. We also plan to coordinate with the B-Cycle program to add E-Bikes and Stations on site. In previous projects this partnership has allowed for free memberships to tenants giving them additional transportation or leisure opportunities. Finally, internet and heat will be included with the rent as an added benefit to the tenants.

b. **Optimize energy use** The project will have energy efficient window systems, meet or exceed energy code, score 250 or more points on Wisconsin Green Built Standards, and highly efficient HVAC systems. The project will also be designed to meet Energy Star New Construction and EPA indoor Air Plus Certification. This will require that we add continuous insulation to the wall assembly as well as provide fresh air to the common areas and continuous circulating air in the units. We plan to install a 134kw solar system to eliminate over 90% of the common area electrical usage.
c. **Protect and conserve water** we will install low flow faucets, toilets, energy efficient appliances, and water heaters with re-circulation water lines.
d. **Optimize building space and material use** Locally sourced masonry- materials utilizing recycled materials where possible. The framing walls will be assembled off-site vs stick build at the property.
e. **Enhance indoor environmental quality (IEQ)** The building will be designed to EPA indoor air plus certification. The building will have generous windows, air purification filters, and operable sashes on windows for fresh air.
f. **Optimize operational and maintenance practices.** Lights on timers, occupancy sensors in common areas.

C. **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?** The Mou calls for services to be provided during the lease up period. For our Uno Terrace project we organized and started coordinating with our Support Service Providers and Management Company 6 months prior to C of O. This early coordination allowed us to be ready for the three months window prior to C of O to meet weekly to discuss potential applicants as well as different ways to directly reach out and connect with potential applicants. This included finding ways to meet with potential tenants while hosting group events or at locations more convenient for them. We plan to take the same approach with this project. Merchant Place Apartments will also have a Community Service space leased by our Supportive Service Provider to meet with potential applicants as well as existing tenants after occupancy.

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phone: 608.230.7010
fax: 608.230.7035
www.focusonenergy.com

MEMORANDUM

To: Sean O'Brien, Northpointe Development Corp

From: Stefanie Bator

Project: Focus on Energy
Energy Design Assistance
Merchant Place Apartments, Madison, WI

Project No.: 4022556

Date: September 9, 2022

Summary: The purpose of the meeting on September 7, 2022 was to review the Energy Design Assistance program and energy savings associated with the Merchant Place Apartments project. Focus on Energy presented results at the meeting.

Focus on Energy collaborates with the project team to explore and quantify alternative materials and systems with the goal of selecting design strategies that are cost effective and have the highest value. Energy analysis results are used to determine custom incentives from Focus on Energy. The project team reviewed the strategy results and associated incremental cost information provided by Focus on Energy and assembled bundles of strategies based on the current design and group discussion.

Bundle 3 WAS SELECTED as the target bundle.

Additional changes to the bundle selection can be made and will be captured during the verification phase.

Item: **Model updates and requested information**

- Owner and design team reviewed the bundles composition and made changes to reflect the current design.

Action: The above changes are now incorporated and the revised results, incentives, and paybacks are included in these minutes.

Item: **Energy Utility Service and Rates**

- Madison Gas and Electric Company, a participating Focus on Energy utility, will provide electric service for the building.
- Madison Gas and Electric Company, a participating Focus on Energy utility, will provide natural gas service for the building.
- Average electric and gas rates for the state of Wisconsin shall be used for the Design Assistance program. Actual rates may be able to be applied if provided by the project team.

Action: Bob Feller (Knothe and Bruce Architects, LLC) to provide actual rates if desired.

Item: **Owner Incentive**

The Design Assistance program provides an incentive to the owner to help reduce the upfront costs associated with the addition of energy-saving strategies evaluated and verified by the program. The owner incentive is not intended to cover all increases in construction costs.

Sean O`Brien (Northpointe Development II Corporation) was identified as the point of contact for the owner incentive.

Action: **Focus on Energy** to provide Sean O`Brien (Northpointe Development II Corporation) with the owner incentive following occupancy and program verification.

Item: **Design Team Incentive**

The Design Assistance program provides an incentive to the design team for their participation in the following activities: (1) attendance at formal meetings; (2) transfer of building architectural/engineering design information; and (3) development of applicable energy conservation strategies' incremental costs (incremental as compared to the base building design). Please note that the design team incentive is not intended to cover actual system(s) design or re-design associated with energy conservation strategies. The design team incentive will be paid out to the person identified as design team lead upon completion of the Bundle Requirements Document.

Bob Feller (Knothe and Bruce Architects, LLC) was identified as the point of contact for the design team incentive.

Action: **Focus on Energy** to provide Bob Feller (Knothe and Bruce Architects, LLC) with the design team incentive upon completion of the Bundle Requirements Document.

Item: **Verification Phase**

Verification, a process that seeks to assure that one of the bundles is implemented, will be laid out in detail in the coming weeks but will generally include 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 design team incentive and sends payment to design team lead.
- Project Team sends Construction Documents to Focus on Energy, electronic format preferred.
- Project Team sends State of Wisconsin approved COMCheck submittal to Focus on Energy.
- Project Team sends requested equipment submittals to Focus on Energy.
- Field verification of select projects of 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.

The purpose of the verification phase is to assist the project team and Focus on Energy toward realizing the energy conservation goals of the program and increasing the likelihood that the incentive proposed during the design phase is achieved upon completion of the project.

Item: **Next Steps**

Action: Upon bundle selection, **Focus on Energy** will prepare the Bundle Requirements Document.

Bundle Results Summary

Bundled Annual Savings

Bundle Description	Peak kW Savings	% Peak kW Savings	kWh Savings	% kWh Savings	Gas Savings (Therm)	% Gas Savings	Energy Cost Savings
Valued	26	14	165,180	14	19,782	27	$38,255
Proposed	33	18	221,544	19	23,897	33	$49,412
Design+	49	26	282,247	24	25,648	35	$59,505

Simple Payback with Incentive

Bundle Description	Energy Cost Savings	Incremental First Cost	Focus on Energy Electric Incentive	Focus on Energy Gas Incentive	Total Incentive	Payback in Years (after incentive)
Valued	$38,255	$271,313	$12,389	$17,210	$29,599	6.3
Proposed	$49,412	$397,841	$16,616	$20,790	$37,406	7.3
Design+	$59,505	$563,276	$21,169	$22,314	$43,483	8.7

Energy Use Intensity

Bundle Description	Energy Use Intensity (kBTU/sf/yr)
Valued	48.6
Proposed	45.3
Design+	43.2

Detailed strategy results are shown in the appendix.

Building Summary

Building Summary		
Location	Madison, WI	
Narrative	Multifamily new construction	
Space Asset Areas	Area	Number of Stories
Apartments (124)	109,938 ft²	4
Lobby, Commons, Fitness	3,227 ft²	1
Corridors	14,883 ft²	4
Commercial	4,422 ft²	1
Stairwells	2,480 ft²	4
Garage	46,263 ft²	1
Total	**181,213 ft²**	**5**
Exterior lighting	Parking: 18,694 ft²	
Systems Summary		
Envelope	Wood wall and roof construction: R-21 for the wall, R-40 for the roof	
Glazing	Non-metal frames aluminum frame or storefront at Lobby and Commercial areas: U-value: 0.27, argon	
Lighting	LED throughout	
Plug/Process	Energy Star Appliances	
Service Water Heating	95% Gas-fired storage tanks (centralized)	
Snow Melt	N/A	
Hours of Operation	Typical residential hours (24/7)	
HVAC	**Apartment:** 95% gas-fired furnaces and DX cooling **Lobby, Commons, Fitness, Corridors:** 95% gas-fired furnaces and DX cooling **Commercial:** 95% Gas-fired Furnaces (no cooling) **Stairwells:** Electric wall unit heaters **Garage:** 80% gas-fired unit heaters	
Utilities		
Electric Utility	Madison Gas and Electric Company	
Gas Utility	Madison Gas and Electric Company	
Schedule		
Construction Documents Complete	08/01/2023	
Construction Start	05/01/2024	
Occupancy	06/01/2025	
Baseline Reference	ASHRAE 90.1-2013 Appendix G	
Other Notes		

Appendix A. Detailed Strategy Results

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Mechanical									
Apartments									
Electronically commutated motor	1	9,539	-188	$1,252	$14,135	11.3		x	x
5% improved DX cooling efficiency	2.6	6,478	0	$943	$20,387	21.6			
10% improved DX cooling efficiency	5	12,387	0	$1,801	$40,773	22.6			
20% improved DX cooling efficiency	9.2	22,697	0	$3,303	$81,547	24.7			x
30% improved DX cooling efficiency	12.8	31,431	0	$4,571	$122,320	26.8			
82% efficient gas furnace	0	0	491	$353	$3,142	8.9			
90% efficient gas furnace	0	0	2,234	$1,605	$17,320	10.8			
95% efficient gas furnace	0	0	3,174	$2,283	$26,182	11.5		x	x
Programmable thermostats for Apartments	0.1	3,441	1,570	$1,631	$3,495	2.1	x	x	
Smart thermostats for Apartments	6.7	29,502	2,368	$5,994	$22,038	3.7			x
Lobby, Commons, Fitness, Corridors									
Electronically commutated motor	2.1	13,520	-222	$1,808	$2,328	1.3		x	x
5% improved DX cooling efficiency	0.5	714	0	$104	$3,358	32.3			
10% improved DX cooling efficiency	0.9	1,354	0	$197	$6,717	34.1			
20% improved DX cooling efficiency	1.7	2,454	0	$356	$13,433	37.7			x
30% improved DX cooling efficiency	2.3	3,352	0	$488	$20,150	41.3			
82% efficient gas furnace	0	0	88	$64	$518	8.1			
90% efficient gas furnace	0	0	401	$289	$2,853	9.9			
95% efficient gas furnace	0	0	571	$411	$4,313	10.5		x	x
Commercial									
Electronically commutated motor	0	367	-6	$48	$569	11.8		x	x
82% efficient gas furnace	0	0	12	$9	$126	14.0			
90% efficient gas furnace	0	0	55	$39	$697	17.9			
95% efficient gas furnace	0	0	78	$56	$1,053	18.8		x	x
Garage									
82% efficient gas furnace	0	0	869	$625	$1,322	2.1			
90% efficient gas furnace	0	0	3,955	$2,841	$7,289	2.6			
95% efficient gas furnace	0	0	5,621	$4,042	$11,018	2.7			
CO sensor control of outdoor air	0	20,682	12,255	$11,816	$4,626	0.4	x	x	x
Architectural									
Apartments									
Wall R-16	0	-23	115	$80	$1,230	15.4	x		

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Wall R-20	0.4	-266	1,072	$735	$14,353	19.5		x	
Wall R-24	0.6	-441	1,705	$1,162	$27,475	23.6			x
Roof R-24	0.2	58	448	$333	$7,212	21.7			
Roof R-30	0.4	121	1,034	$762	$20,877	27.4			
Roof R-36	0.5	139	1,421	$1,043	$34,542	33.1	x		
Roof R-40	0.6	128	1,614	$1,181	$43,653	37.0		x	
Roof R-50	0.7	127	1,959	$1,428	$66,428	46.5			x
Roof R-60	0.8	132	2,187	$1,591	$89,203	56.1			
White roof	1.6	3,710	-321	$308	$498	1.6			
Glazing high solar gain w/ argon, non-metal frame	1	-652	2,720	$1,862	$3,133	1.7			
Glazing medium solar gain, high transparency w/ argon, non-metal frame	4.5	10,119	1,902	$2,838	$13,683	4.8			
Glazing medium solar gain w/ argon, non-metal frame	4.5	10,119	1,902	$2,838	$8,408	3.0	x	x	x
Glazing low solar gain w/ argon, non-metal frame	8.9	22,834	754	$3,864	$8,408	2.2			
10% window to wall area ratio	9.3	22,054	2,426	$4,954	$0	0.0			
20% window to wall area ratio	2.6	6,286	708	$1,427	$0	0.0			
Lobby, Commons, Fitness									
Wall R-16	0	5	5	$3	$60	20.1	x		
Wall R-20	0	39	47	$38	$703	18.5		x	
Wall R-24	0	62	75	$61	$1,346	22.1			x
Glazing high solar gain w/ argon, metal frame	0.1	163	21	$41	$154	3.7			
Glazing medium solar gain, high transparency w/ argon, metal frame	0.2	368	-22	$39	$670	17.2			
Glazing medium solar gain w/ argon, metal frame	0.2	277	-20	$26	$412	15.8			
Glazing high solar gain triple pane w/ argon, metal frame	0.1	300	113	$126	$5,478	43.5	x	x	x
Glazing medium solar gain, high transparency triple pane w/ argon, metal frame	0.3	468	77	$126	$5,995	47.6			
Glazing medium solar gain triple pane w/ argon, metal frame	0.3	391	74	$111	$5,736	51.7			
Glazing low solar gain triple pane w/ argon, metal frame	0.4	366	23	$70	$5,736	81.9			
10% window to wall area ratio	0.4	420	102	$135	$0	0.0			
20% window to wall area ratio	0.1	3	33	$23	$0	0.0			
Corridors									
Roof R-24	0	57	54	$49	$976	19.9			
Roof R-30	0	120	124	$108	$2,827	26.2			
Roof R-36	0.1	161	171	$148	$4,677	31.6	x		
Roof R-40	0.1	182	194	$165	$5,910	35.8		x	
Roof R-50	0.1	213	235	$200	$8,994	45.0			x
Roof R-60	0.1	236	262	$224	$12,077	53.9			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Commercial									
Wall R-16	0	1	1	$1	$33	33.2	x		
Wall R-20	0	12	11	$9	$388	43.1		x	
Wall R-24	0	16	18	$14	$742	53.0			x
Glazing high solar gain triple pane w/ argon, metal frame	0	36	43	$36	$6,375	100+	x	x	x
Stairwells									
Wall R-16	0	105	0	$14	$49	3.5	x		
Wall R-20	0	971	0	$140	$573	4.1		x	
Wall R-24	0	1,535	0	$223	$1,097	4.9			x
Roof R-24	0	179	0	$25	$130	5.2			
Roof R-30	0	412	0	$60	$377	6.3			
Roof R-36	0	567	0	$80	$623	7.8	x		
Roof R-40	0	643	0	$91	$788	8.7		x	
Roof R-50	0	781	0	$114	$1,199	10.5			x
Roof R-60	0	873	0	$126	$1,610	12.8			
Garage									
Wall R-16	0	0	39	$29	$774	26.7		x	x
Lighting									
Facility									
Exterior tradable site lighting reduced to 2.36 kW	0	1,147	0	$169	$397	2.4			
Exterior tradable site lighting reduced to 2.10 kW	0	2,295	0	$334	$795	2.4	x		
Exterior tradable site lighting reduced to 1.83 kW	0	3,442	0	$499	$1,192	2.4		x	
Exterior tradable site lighting reduced to 1.57 kW	0	4,589	0	$668	$1,590	2.4			x
Exterior tradable site lighting reduced to 1.31 kW	0	5,737	0	$832	$1,987	2.4			
Exterior tradable site lighting reduced to 1.05 kW	0	6,883	0	$1,002	$2,384	2.4			
Exterior tradable site lighting reduced to 0.79 kW	0	8,031	0	$1,169	$2,782	2.4			
Exterior tradable site lighting reduced to 0.52 kW	0	9,178	0	$1,336	$3,179	2.4			
Apartments									
Lighting power in Apartments reduced to 0.96 W/ft²	0.6	11,402	-209	$1,507	$7,341	4.9			
Lighting power in Apartments reduced to 0.86 W/ft²	1.3	22,855	-421	$3,023	$14,687	4.9	x		
Lighting power in Apartments reduced to 0.75 W/ft²	2	34,332	-634	$4,541	$21,560	4.7		x	
Lighting power in Apartments reduced to 0.64 W/ft²	2.7	45,784	-848	$6,053	$27,962	4.6			x
Lighting power in Apartments reduced to 0.54 W/ft²	3.5	57,270	-1,064	$7,567	$33,892	4.5			
Lighting power in Apartments reduced to 0.43 W/ft²	4.2	68,757	-1,282	$9,084	$39,350	4.3			
Lobby, Commons, Fitness									
Occupancy sensor controls, 25% of space	0	365	-7	$48	$151	3.1			

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Occupancy sensor controls, 50% of space	0.1	734	-15	$96	$302	3.1	x		
Occupancy sensor controls, 75% of space	0.1	1,102	-22	$146	$453	3.1		x	x
Occupancy sensor controls, 100% of space	0.2	1,466	-30	$192	$604	3.1			
Vacancy sensor controls, 75% of space	0.2	1,276	-26	$167	$453	2.7			
Vacancy sensor controls, 100% of space	0.2	1,701	-35	$223	$604	2.7			
Lighting power in Lobby, Commons, Fitness reduced to 0.46 W/ft²	0.1	466	-9	$61	$215	3.5			
Lighting power in Lobby, Commons, Fitness reduced to 0.41 W/ft²	0.2	937	-18	$125	$431	3.4	x		
Lighting power in Lobby, Commons, Fitness reduced to 0.36 W/ft²	0.2	1,404	-28	$185	$633	3.4		x	
Lighting power in Lobby, Commons, Fitness reduced to 0.31 W/ft²	0.3	1,870	-37	$246	$821	3.3			x
Lighting power in Lobby, Commons, Fitness reduced to 0.26 W/ft²	0.4	2,341	-46	$308	$995	3.2			
Corridors									
Occupancy sensor controls, 25% of space	0.2	2,286	-37	$305	$696	2.3	x		
Occupancy sensor controls, 50% of space	0.5	4,565	-74	$610	$1,393	2.3		x	x
Occupancy sensor controls, 75% of space	0.7	6,796	-112	$906	$2,089	2.3			
Occupancy sensor controls, 100% of space	0.9	8,062	-132	$1,078	$2,785	2.6			
Lighting power in Corridors reduced to 0.46 W/ft²	0.4	2,828	-45	$380	$994	2.6			
Lighting power in Corridors reduced to 0.41 W/ft²	0.8	5,658	-91	$758	$1,988	2.6	x		
Lighting power in Corridors reduced to 0.36 W/ft²	1.2	8,483	-138	$1,136	$2,919	2.6		x	
Lighting power in Corridors reduced to 0.31 W/ft²	1.7	11,310	-186	$1,512	$3,785	2.5			x
Lighting power in Corridors reduced to 0.26 W/ft²	2.1	14,138	-235	$1,888	$4,588	2.4			
Stairwells									
Occupancy sensor controls, 25% of space	0	179	0	$26	$116	4.5	x		
Occupancy sensor controls, 50% of space	0.1	354	0	$50	$232	4.6		x	x
Occupancy sensor controls, 75% of space	0.1	530	0	$76	$348	4.6			
Occupancy sensor controls, 100% of space	0.2	704	0	$102	$464	4.6			
Lighting power in Stairwells reduced to 0.46 W/ft²	0.1	241	0	$36	$166	4.6			
Lighting power in Stairwells reduced to 0.41 W/ft²	0.2	481	0	$69	$331	4.8	x		
Lighting power in Stairwells reduced to 0.36 W/ft²	0.2	714	0	$104	$486	4.7		x	
Lighting power in Stairwells reduced to 0.31 W/ft²	0.3	949	0	$136	$631	4.6			x

Strategy	Annual Savings				Incremental First Cost	Payback (yrs)	1 : Valued	2 : Proposed	3 : Design+
	Peak kW	kWh	Gas (Therm)	Energy Cost					
Lighting power in Stairwells reduced to 0.26 W/ft²	0.4	1,184	0	$171	$765	4.5			
Garage									
Occupancy sensor controls, 50% of space	0.5	4,964	-62	$679	$1,732	2.6		x	x
Occupancy sensor controls, 75% of space	1.1	11,169	-141	$1,524	$3,896	2.6			
Occupancy sensor controls, 100% of space	1.7	17,375	-222	$2,368	$6,061	2.6			
Lighting power in Garage reduced to 0.19 W/ft²	0.9	6,347	-79	$868	$3,089	3.6			
Lighting power in Garage reduced to 0.17 W/ft²	1.8	12,695	-160	$1,729	$6,180	3.6	x		
Lighting power in Garage reduced to 0.15 W/ft²	2.7	19,042	-243	$2,598	$9,073	3.5		x	
Lighting power in Garage reduced to 0.13 W/ft²	3.6	25,390	-326	$3,459	$11,767	3.4			x
Lighting power in Garage reduced to 0.11 W/ft²	4.5	31,737	-412	$4,324	$14,262	3.3			
Lighting power in Garage reduced to 0.08 W/ft²	5.4	38,084	-502	$5,179	$16,559	3.2			
Lighting power in Garage reduced to 0.06 W/ft²	6.3	44,432	-592	$6,039	$18,657	3.1			
Plug/Process									
Facility									
Traction elevator, gearless	0.5	2,051	0	$298	$26,509	89.0			
Traction elevator, machine roomless	1	4,307	0	$627	$35,547	56.7		x	x
Traction elevator, regenerative	1.4	5,785	0	$840	$92,783	100+			
Elevator permanent magnet motor	0.2	744	0	$110	$33,137	100+			
Apartments									
Clothes washers, ENERGY STAR minimum certification efficiency	4.5	32,988	-355	$4,543	$18,395	4.0	x	x	x
Clothes dryers, ENERGY STAR minimum certification efficiency	0.6	4,496	-58	$612	$36,791	60.1	x	x	x
Dishwashers, ENERGY STAR premium efficiency	0.4	3,060	284	$647	$122,636	100+	x	x	x
Refrigerators, ENERGY STAR minimum certification efficiency	1.2	9,235	-120	$1,258	$42,923	34.1	x	x	x
Service Water Heating									
Facility									
90% SWH efficiency	0	0	1,780	$1,279	$4,660	3.6	x		
95% SWH efficiency	0	0	2,434	$1,750	$6,990	4.0		x	x
Apartments									
Showerheads, WaterSense fixture flow at 2.00 gpm	0	0	1,475	$1,060	$368	0.3			
Showerheads, WaterSense fixture flow at 1.75 gpm	0	0	2,212	$1,591	$785	0.5	x	x	
Showerheads, WaterSense fixture flow at 1.50 gpm	0	0	2,949	$2,120	$1,091	0.5			x

Appendix B. Key Model Inputs

Utility Rates

Fuel	Utility	Conversion factor	Rate
Electric	Madison Gas and Electric Company	n/a	Average rate: $0.1455per kWh $/kWh
Gas	Madison Gas and Electric Company	n/a	Average rate: $0.72per therm $/therm

Copies:

Attendees shown in **bold**.

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