



ENDING POVERTY

Supportive Housing Plan
Draft: November 10, 2014

Madison Supportive Housing
707-709 Rethke Avenue
Madison, WI

Contact Information			
	Owner	Management Agent	Services Partner*
Organization	Rethke Washington, LLC	Heartland Housing, Inc.	Heartland Health Outreach
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* Agency supplying on-site Support Coordination

**Supportive Housing Plan
Madison Supportive Housing, Madison, Wisconsin**

I. Overview

The new construction supportive housing development at 707-709 Rethke Avenue will deliver 60 high quality apartments (the Development) for individuals who would not be able to stay housed without a wide range of supportive services. People living in supportive housing usually have a history of homelessness and often face persistent obstacles to maintaining housing, such as a serious mental illness, a substance use disorder, or a chronic medical problem. Heartland Housing as the developer and property manager (HH) and Heartland Health Outreach (HHO) as the service provider will collaborate to provide high-quality supportive services for the residents of the Development.

II. Site Characteristics

A. Unit Mix

# Bedrooms	# Bathrooms	Unit Size (sq ft)	%AMI Target	Total Units	Monthly Rent
0	1	350	30%	6	\$383
0	1	350	50%	33	\$682*
0	1	350	60%	21	\$682*

* Note: These units receive project based subsidies. Tenants are responsible for rent equivalent to 30% of their income.

B. Access to Community Amenities and Transportation

1. The Development is located in proximity to many public and private amenities that will enhance the quality of life of the residents. These amenities include:
 - Access Community Health Center within .5 miles
 - Local grocery stores (Hy-Vee, Copps, Aldi’s, Woodman’s Food Market) within 1.1 miles
 - A City of Madison library (Hawthorne Branch) within .8 miles
 - Affordable shopping options: Family Dollar within .6 miles, Shopko within .9 miles and Walgreens drugstore within .7 miles
 - Madison and Dane County Public Health Clinic Location within .8 miles
 - East Madison Community Center within .9 miles and Salvation Army Community Center within .6 miles
 - Parks and open space (Carpenter-Ridgeway Park, Starkweather bike path) within .4 miles

2. Public transportation and access to major roadways are close to the Development. The site is within .2 miles of 3 regular City of Madison Metro Transit bus lines (route 6, 20, and 25) along E. Washington St., which connects residents to downtown Madison as well as health centers and shopping. The Development is also only .7 miles from N. Fair Oaks Avenue and Commercial Avenue with additional bus lines (route 17 and 34). These accessible transit routes will allow residents that do not have private transportation to easily get to other areas of the City and County.

II. Affordability

Rents will be made affordable through HUD Project-based Rental Assistance (54 units) and 30% AMI rents (6 units) with no rental or operating subsidy.

The City of Madison Community Development Authority (CDA) is providing 27 project based vouchers and Dane County Housing Authority (DCHA) is providing 27 project based vouchers. They understand and agree that Supportive Housing Populations, i.e. homeless and those at risk of homelessness, are the priority for these units. Heartland Housing (as property management agent) and Heartland Health Outreach (as service provider) will screen prospective residents to ensure they are in need of the additional services available only through permanent supportive housing like the Madison Supportive Housing project.

III. Support Coordination

Heartland Health Outreach (HHO) will provide on-site support coordination at the Development. Heartland Health Outreach's mission is to improve the health of people who lack access to health care by providing culturally competent, multidisciplinary services that prevent illness and improve physical, mental, and social well-being, and by advocating for human rights, including the right to health care.

The health care partner of Heartland Alliance for Human Needs & Human Rights, Heartland Health Outreach (HHO) was founded in 1985 as a Health Care for the Homeless demonstration project, funded by the Robert Wood Johnson Foundation and the Pew Charitable Trust. Today, it is a community health organization dedicated to addressing the lack of quality care for Chicago's many disenfranchised populations, including people who are homeless, poor, HIV positive, mentally ill, addicted, and immigrants or refugees.

HHO's integrated care services for people who are homeless include:

- Outreach, psychosocial rehabilitation, psychiatric assessment, medication management and monitoring, and case management for mentally ill or dually diagnosed adults
- Outreach, case management, and addiction services for those who have a substance use disorder;
- A 280-unit continuum of supervised and independent housing options for people who have a serious mental illness or a dual diagnosis;
- A full range of medical diagnostic, treatment, and education/prevention services at two community health centers, as well as through mobile outreach at more than 100 overnight and transitional shelters and drop-in centers throughout Chicago;
- Oral health care; and
- Coordinated TB treatment and housing.

IV. Access to Services

HHO's service delivery model is designed to assist residents in living independently by providing them with opportunities to learn, or further develop skills, to manage their finances, assets, housing, physical and mental health. HHO's supportive housing services are geared towards goals of maintaining housing stability and increasing self-sufficiency. Utilizing a strengths-based case management philosophy, our supportive services are flexible, based on participant needs and goals, and voluntary. Resident level of participation in services varies based on need. Case management services include assessment, engagement, service planning and goal setting, crisis intervention, substance use and mental health services, and linkage to healthcare, workforce development

and asset development services. Further, HHO will support the delivery of services provided by other organizations through inter-organizational collaboration and coordination.

To provide these services at Rethke, HHO proposes to staff the building with an interdisciplinary, on-site team that will operate 12 hours/day, seven days/week. The team will be headed by a licensed clinician who will oversee four other direct service positions: two case managers, one recovery specialist (with substance use treatment experience), and one community health worker (a professional with lived experience similar to that of the building’s residents). The team members will manage a shared caseload with a direct service staff to participant ratio of 1:15. This ratio is in line with best practice guidelines for the Housing First model.

As a team, the staff will collaborate with building management to screen all prospective residents. Prior to or soon after move-in, team members will conduct a comprehensive bio-psycho-social assessment with all new residents. The assessment will identify areas of concern for all residents around which staff and residents will develop individualized goals. Detailed service plans will be constructed around these goals to ensure that each resident has access to the type of support necessary to optimize his or her tenure in the community. Primary care, mental health services, substance use counseling, linkage to community-based supports, family reunification, money management, employment, and access to social assets are some of the areas that will be addressed in each service plan. All face-to-face and collateral activities will be documented in the form of progress notes, and the service plan will be reviewed and revised with each participant on a quarterly basis. The assessment is updated annually.

Working with the property manager, HHCS will attempt to circumvent any lease violations. Housing issues related to lease compliance will be addressed through the partnership of the property manager, case manager and resident. If the lease violation relates to rent payment, the group will develop a reasonable payment plan, and the case manager and resident will develop a budget that includes payment of rent according to the plan.

V. Annual Budget

Item	Amount
Payroll	213,248
Staff Related	15,000
Office Services	1,200
Equipment	6,500
Client Support	5,000
Management/General/Admin:	38,101
TOTAL	\$279,049

HHO is working with the city of Madison, Dane County, and Wisconsin Medicaid to explore funding options for the interdisciplinary supportive services team.

VI. Referral, Screening and Communication Plan

HH’s collaborative management model is focused on maintaining residents’ housing and creating a positive living environment. HH’s property and asset management team works in concert with supportive service staff to identify and address problems that might prove disruptive to the building or surrounding community. HH evaluates each prospective tenant as an individual, so that typical barriers do not automatically disqualify him or

her from housing. Tenants, with or without the assistance that will be offered by HHO can make Requests for Reasonable Accommodations under the Fair Housing Laws, HH will respond to all requests in a timely manner to make sure that all reasonable accommodations are made. As a result of this strengths-based approach, HH is able to successfully house individuals confronting multiple life challenges.

While HHO, and other agencies will be referring tenants to the property, tenant selection will be primarily under the supervision of Heartland Housing and the on-site property manager. Tenant selection will include interviews and income verification, criminal and credit checks, notification of selection or rejection, and maintenance of waiting lists. HH will adhere to all rules and regulations as applicable and approved by WHEDA, DOH, HUD Section 8 Program, and Low Income Housing Tax Credit (LIHTC) tenancy. Appropriate procedures to re-certify tenant incomes will be followed annually. All tenant selections, certifications, and other tenant related actions will comply with the other Regulatory Agreements identified in the Management Agreement.

If issues arise with a resident, the goal of HH's collaborative management model is to help the tenant work out a solution that is acceptable to the tenant, management and the service provider. Property management will identify problems and lease violations and immediately inform HH upper management and the appropriate HHO personnel. When a problem comes up regarding lease violations, the tenant and HHO case manager will receive appropriate notice from the property manager (this also includes Building Rules violations). A meeting will be scheduled for the tenant, property manager, HHO case manager, other appropriate HH staff and witnesses. The resident has the right to have an additional person present. A plan of action should result from this meeting with specific objectives to be met. If the problem is rent related, a solution may include a budget session and payment plan arrangement for the tenant. If housekeeping is an issue, housekeeping services can be arranged for the tenant. After a solution is worked out, it is submitted to the Property Manager and an agreement is negotiated, all parties must execute the agreement. The Director of Property Management has the sole and final approval over acceptance of these negotiated plans of action.

It is explained to the tenant that failure to follow through with the agreement will lead to serious consequences. Property management shall follow all procedures and regulations of the Madison Tenant Landlord Ordinance related to any eviction process.

VI. Transition Plan in the Event Service Funding and/or Rental Subsidy Is Reduced or Discontinued

The Supportive Housing Plan outlines the array of services that are necessary for housing retention of Supportive Housing tenants. The level of services described in the Supportive Housing Plan is contingent upon Dane County Department of Human Services or other outside funding. In addition, rental assistance is necessary for Supportive Housing Populations to remain in the units. Should the outside funding sources for services or rental assistance either (i) be reduced to an amount insufficient to deliver the scope of necessary services, or (ii) discontinued through no fault of the Owner, then the Owner shall make, with assistance from the service providers to the extent possible, good faith reasonable efforts to find alternative funding sources or rental assistance that would accommodate the Supportive Housing Population for which the Project received an allocation of federal low income housing credits.

Owner shall notify WHEDA in writing promptly upon learning that (a) the outside funding sources for the supportive services are either discontinued or are being reduced to an amount that is insufficient to deliver the scope of necessary services, or (b) if the rental assistance is reduced or terminated. If, despite its good faith efforts, the Owner is unable to secure alternative outside funding source(s) for services or replacement rental assistance, it shall notify WHEDA accordingly and provide supporting documentation, as appropriate. In addition, Owner shall work with WHEDA to develop and execute a transition plan that will ensure the short- and long-term economic viability of the project while endeavoring to maintain the spirit of the Supportive Housing

Plan. The transition plan may include, but not be limited to, transitioning the target population from the original Supportive Housing Population to a non-Supportive Housing Population.

VII. Agreement among Partners

WHEREAS **Rethke Washington, LLC** is developing a low-income housing tax credit project located at 707-709 Rethke Avenue in Madison, Wisconsin (the “Development”); and

The tax credit application submitted to the Wisconsin Housing and Economic Development authority in connection with the Development stated that supportive services would be provided to residents of the Project; and

Heartland Health Outreach provides, coordinates, or represents agencies that provide direct community-based services in the **Madison** area to Supportive Housing Populations; and

Heartland Housing, Inc. seeks to expand and support affordable housing opportunities for Supportive Housing Populations in the Madison community;

THEREFORE, **Rethke Washington, LLC, Heartland Health Outreach** and **Heartland Housing, Inc.** agree to the following supportive housing partnership to target 60 apartment units (the “Supportive Housing Units”) within the **Madison Supportive Housing** apartment complex to Supportive Housing Populations

Rethke Washington, LLC shall:

- Agree that all 60 units will be Supportive Housing Units.
- Assure that the Supportive Housing Units remain available to Supportive Housing Populations, and that the purposes and spirit of this agreement are maintained through the compliance period.
- Assure that any special arrangements (rent adjustments, unit subsidies, arrangement for transportation services, etc.) outlined in the Supportive Housing Plan are maintained through the compliance period.

Heartland Health Outreach shall:

- Provide staffing as outlined in Section IV to offer services/support coordination as needed, requested and accepted by tenants.
- Assist Supportive Housing applicants in the application process, including requesting and negotiating Reasonable Accommodations and Modifications, if applicable, and as needed and accepted.
- Facilitate access to community-based supportive services offered by **Heartland Health Outreach** and other area human services agencies for tenants. It is understood and agreed that these services shall be available to said tenants on an as-needed basis, and that receipt of these or any other services shall not be a condition of tenancy.
- Facilitate communication with **Heartland Housing, Inc.** by designating, and maintaining in the event of staff turnover, a named individual as the primary contact on matters related to Supportive Housing Units.

- Protect the confidentiality of tenants by sharing with **Heartland Housing, Inc.** only that information which is related to tenancy.

Heartland Housing, Inc. shall:

- Notify **Heartland Health Outreach** of initial lease-up 6 months prior to anticipated occupancy certification or when marketing begins, whichever comes first.
- Share tenant eligibility and screening criteria with **Heartland Health Outreach** so that the on-site Support Coordinator will be prepared to refer qualified tenants and assist them with requests for Reasonable Accommodations or Modifications when necessary.
- Educate initial and subsequent on-site property managers on the Supportive Housing Plan.
- Affirmatively market to persons with all types of disabilities, as may be described in the **Madison Supportive Housing** apartment complex's Affirmative Fair Housing Marketing Plan. Projects may advertise as offering services for people with particular types of disabilities but must admit other persons with disabilities who may benefit from the services.
- Screen all referred applicants using screening criteria established for all applicants at the apartment community, according to State and Federal Fair Housing Law.
- In the event a referred applicant is denied housing, (1) notify the applicant and **Heartland Health Outreach** of reason for denial, (2) accept and consider requests for Reasonable Accommodations in accordance with State and Federal Fair Housing Law, and (3) hold unit open until the request process is complete.
- Maintain a separate waiting list for referrals or applicants to Supportive Housing Units and prioritize these households for any Supportive Housing Units that may become vacant after the initial rent-up period, based upon the minimum number of units specified in the application.
- Communicate tenancy issues with the **Heartland Health Outreach** in a timely manner.
- Facilitate communication with **Heartland Health Outreach** by designating, and maintaining in the event of staff turnover, a named individual as the primary contact on matters related to the Supportive Housing Units.

All parties to this Agreement shall:

- Agree that **Rethke Washington, LLC** and **Heartland Housing, Inc.** are responsible for meeting compliance requirements established by the IRS and IHDA.
- Agree that **Rethke Washington, LLC** and **Heartland Housing, Inc.** are responsible for maintaining the property for the benefit of all the tenants.
- Agree that **Rethke Washington, LLC** and **Heartland Housing, Inc.** are responsible for communicating as needed to assist with housing retention of Supportive Housing tenants, to the extent that such assistance is accepted by the tenants.

- Agree that the provisions and the spirit of this agreement notwithstanding, decisions on the admittance and/or retention of tenants according to Fair Housing and WI Landlord Tenant Law are the responsibility of **Heartland Housing, Inc.**
- Agree that the terms of the Supportive Housing Plan for **Madison Supportive Housing** prepared jointly by **Rethke Washington, LLC, Heartland Housing, Inc.** and **Heartland Health Outreach**, including maintenance of a clear separation of property management and supportive service provision functions within or among partner organizations to assure confidentiality of tenant information, are hereby incorporated by reference.
- Agree that tenant participation in supportive services will not be a condition of tenancy.

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IN WITNESS WHEREOF, the parties have executed, or caused this agreement to be executed by their duly authorized representatives, as of the date below written.

Michael Goldberg, Secretary
Rethke Washington, LLC

Date

Michael Goldberg, Executive Director
Heartland Housing, Inc.

Date

Karen Batia, Executive Director
Heartland Health Outreach

Date

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