

**STAFF REVIEW OF PROPOSALS FOR
2013 – 2014 Funding Process**

1. **Project Name/Title:** Affordable Rental Housing
2. **Agency Name:** Common Wealth Development
3. **Requested Amount:** 2013: \$432,000
2014: \$432,000 (Prior Year Level \$197,050)
4. **Project Type:** New or Continuing

5. **Framework Plan Objective Most Directly Addressed by Proposed Activity:**

D. Housing – Rental housing

6. **Product/Service Description:**

Common Wealth Development (CWD) proposes to acquire and rehabilitate 16 units of affordable rental housing for low-income households in Southwest Madison. CWD provides property management for the affordable housing developments that they own and operate.

7. **Anticipated Accomplishments (Numbers/Type/Outcome):**

Funds will be used to develop 8 units of affordable rental housing in 2013 and 8 units of affordable rental housing in 2014. CWD will target 4 of the 16 units to households at or below 50% of the area median income (AMI). All units will initially be rented to households at or below 60% of AMI, per the 2013-2014 Framework and HOME regulations.

8. **Staff Review:**

The proposal is for a “license to hunt” meaning that sites have not yet been identified. If implemented as planned, the proposed acquisition/rehab projects will effectively produce affordable rental housing. The proposed budget is based on 29 years of experience developing housing and appears reasonable. However, an actual project pro-forma and related details will need to be submitted, evaluated and approved when the sites are known. The actual per unit subsidy may vary depending on the size of the units, purchase price and amount of necessary rehab.

CWD’s application demonstrates a diverse array of financial & volunteer support. CWD proposes to leverage a first mortgage loan of approximately \$386,000 for each 8-unit project as well as other additional resources needed to complete each project. Based on past performance and experience in developing housing, CWD should be able to meet these objectives in the proposed timeline.

CWD proposes to target properties in SW Madison including the SW-North/Bettys/ Hammersley/Theresa/Park Edge/Park Ridge Neighborhood Resource Team areas.. These areas are identified as City of Madison focus areas due to higher than average rental rates, vacancy rates, absentee landlords and police calls as well as lower property values. CWD plans to improve property conditions through needed rehabilitation while increasing the presence of a local landlord in an area with a high percentage of absentee landlords. CWD proposes to monitor foreclosed, vacant properties as potential purchase options which is consistent with the Mayor’s goal of converting foreclosures into affordable housing and the City’s Anti-displacement policy. Rental vacancy rates in Madison have been steadily dropping over the past five years to a historic low of 2%, demonstrating pent up demand for rental units.

CWD has a strong knowledge of the housing market; however the organization’s rental experience is limited to the Marquette neighborhood. Project sites identified will be consistent with the 2013-2014 Framework condition to not convert owner-occupied units to rental units. CWD’s application acknowledges working in SW Madison may present new challenges and different assumptions regarding market and costs. Having been established to stabilize the once distressed Willy St./Marquette neighborhood, CWD is experienced and successful with neighborhood revitalization efforts.

CWD’s proposal gives solid evidence of coordinating with existing agencies and resources in this target area. Specific to this proposal, CWD is in the process of hiring a Housing Community Organizer (HCO) by the end of July in coordination with the SW Joining Forces for Families (JFF) Office, Orchard Ridge United Church of Christ, and Public Health Madison & Dane County. This HCO will develop partnerships to coordinate efforts

and maximize positive outcomes for the tenants in this area, especially in CWD's proposed new SW developments. Hiring a HCO also demonstrates thorough planning and should yield a positive impact in that area. By working with these agencies CWD can deal with issues that arise.

In a phone conversation, CWD's Executive Director clarified the following information:

- 1) Qualifications & Development Experience: Two CWD staff are licensed Real Estate Brokers who will assist in the search for and analysis of suitable acquisitions in the target area.
- 2) Market Conditions: Current real estate listings demonstrate an adequate supply of 4-plexes in CWD's price range. CWD contracted for a brief housing market study for the SW side in 2009, but recognizes that updated information will be needed to assess the market conditions in these areas. CWD also clarified that they prefer to search for 4-unit properties with 2-3 BRs, but will also review 8-unit and 2-unit properties that are for sale.
- 3) 15-Year Pro-forma: CDBG staff asked CWD to resubmit the 15 year pro-forma due to a formula error on the vacancy/bad debt that calculated the bottom line (cash flow) incorrectly.
- 4) Duplication of Services: The Housing Community Organizer will not duplicate direct services provided by JFF, CAC, TRC or other organizations.

CWD is a Community Housing Development Organization (CHDO) and qualifies for HOME CHDO set aside funds.

This proposal does not identify a specific site(s) but rather requests funds to allow the agency to seek a site(s). Proposed new HUD rules state that funds may not be committed unless a specific local project with an address has been reviewed and approved based on detailed project information. If funding is recommended, this project may only be approved contingent upon having identified a specific site(s) by a certain date and providing related project detail sufficient for staff to ensure a viable project and compliance with regulatory requirements.

HUD has proposed a slate of significant changes to the HOME regulations. These changes have been put forth for comment and at this time the final version is not decided. It is HUD's intent to have these rules finalized by the end of this year. If this project is funded it will have to comply with all future adopted regulatory changes.

Total Cost/Total Beneficiaries Equals:	\$818,406/8 rental housing units= \$102,301/unit
CD Office Funds/CD-Eligible Beneficiaries Equals:	\$432,000/8 rental housing units= \$54,000/unit
CD Office Funds as Percentage of Total Budget:	53%

ORGANIZATION:	ORGANIZATION
PROGRAM/LETTER:	B Program B Rental Housing
OBJECTIVE STATEMENTS:	CDBG: D. Housing - Rental housing (CDBG)

DESCRIPTION OF PROJECT

1. NEED FOR PROJECT: Please identify local community need, including gap you are addressing, and assessment of market conditions of the neighborhood, the response of the neighborhood and the alderperson of the proposed project.

This project addresses the need to expand the number of affordable housing rental units & to improve the quality & diversity of units available to low er income individuals. SW Madison has pocketed neighborhoods overw helmed with high levels of poverty & homelessness. 71% of children at Falk Elementary & 51% at Orchard Ridge Elementary in 2010-11 were low income. Falk & Orchard Ridge have high mobility rates of 28.91% & 23.32% respectively, compared to 18% of all MMSD elementary schools. According to a report by Urban Assets, 20% of the properties on Russett/Balsam Rds are ow ned by landlords that don't live in Madison & the conditions of the properties are fair to poor. In the Loreen/Bettys/Hammersley Area, 81% of the duplexes are non-ow ner occupied and 30% are ow ned by landlords that don't live in Madison.

2. PROJECT DESCRIPTION: Please provide an overview of the project, including whether project is acquisition, rehab and/or new construction, type, size of unit created, and the impact of your project.

Common Wealth Development will acquire and rehabilitate 8 units of housing in 2013 and another 8 units of housing in 2014 in SW Madison. CWD will create 4 units for households at or below 50% of Dane County Median Income and 12 units for households at or below 80%. Where feasible, CWD will incorporate accessibility and energy efficiency features and remove lead paint and asbestos. These units will expand the number of affordable housing rental units and improve the quality and diversity of the units available to low er income individuals and families in SW Madison. There is a dire need for decent housing managed by invested landlords in SW Madison. Affordable housing will increase family and community stability in SW Madison.

3. PROPOSED PROJECT GOALS: Please provide the total number of units in the project, the number of affordable units created and the number of units assisted with requested funds, the number of unduplicated households served by the assisted units.

CWD will expand the number of decent affordable housing rental units & improve the quality & diversity of the units available to low er income individuals throughout the community. Over 2 years,CWD will provide affordable housing to 16 households, serving 16-64 individuals. 4 households will serve those at or below 50% of Dane County Median Income & 12 households will serve those at or below 80%.

4. SERVICES INCLUDED IN PROPOSED PROJECT: Please describe any services (such as housing counseling or case management), provided to the residents in this project, including those that are disability related.

If services are ongoing, please describe the content and frequency.

n/a

ORGANIZATION:
PROGRAM/LETTER:

Organization Name: Common Wealth Development
B Program B Rental Housing

5. LOCATION: Please identify the specific site or target neighborhood(s).

CWD will target potential sites in SW Madison, including the Balsam/Russett and SW-North/Betty/Hammersley/Theresa/Park Edge/Park Ridge Resource Team areas. CWD has not yet identified the 16 units of housing but will monitor foreclosed properties as potential purchase opportunities.

6. POPULATION SERVED: Please describe the target population in terms of preferences to a specific population (e.g., families, individuals with a disability, homeless) or any other unique characteristic.

Common Wealth Development will target low income households. 4 units will be available for households under 50% of Dane County Median Income. 12 units will be available to households under 80% of Dane County Median Income. Where possible, Common Wealth Development will create housing accessible to people with disabilities.

7. OUTREACH PLAN: Please briefly describe your affirmative marketing strategy, tenant selection plan and any other strategies to engage your intended population.

Common Wealth Development will work closely with the Housing Community Organizer to market the apartments at the Housing Service Center that will be located at the JFF office on Russett Rd. CWD will coordinate with Michael Bruce at the JFF office and Department of Public Health nurses, Kim Neuschel and Jessica LeClair, to successfully market the apartments to neighborhood residents. CWD has a successful outreach plan that enables us to maintain high occupancy rates. CWD affirmatively markets all rental properties. A notice of vacancies is sent to a list of organizations and service providers representing and aiding minority and low-income populations and people with disabilities. The Equal Housing Opportunity logo is used with all advertising and the Fair Housing Poster is displayed in our offices. Records of advertising are kept for three years. The source of the applicant's knowledge of the vacancy is tracked in the application.

8. COORDINATION: Please describe how you coordinate your project with other community groups or agencies.

Through funding from Orchard Ridge United Church of Christ, CWD, in coordination with Joining Forces for Families and Public Health Madison & Dane County is hiring a Housing Community Organizer to centralize & improve upon current housing services in SW Madison. The Housing Community Organizer will develop a Housing Service Center & identify opportunities to build greater resiliency within the SW neighborhoods by organizing residents & stakeholders to address the root causes of homelessness and poverty. CWD will use the Housing Service Center to market apartment vacancies. CWD has a 31 year history as a good landlord so we get many referrals from agencies and will work with these agencies to market apartment vacancies. CWD will work with these agencies to deal with any potential issues that arise with tenants of these apartments. Given our unique partnership with Orchard Ridge, JFF and Public Health, we can use these connections to coordinate efforts and maximize positive outcomes.

9. VOLUNTEERS: Please describe how volunteers will be utilized in your project.

none

10. Number volunteers utilized in 2011?

0

Number of volunteer hours utilized in 2011?

0

ORGANIZATION:
PROGRAM/LETTER:

Organization Name: Common Wealth Development
B Program B Rental Housing

11. BARRIERS: Are there populations that are experiencing barriers to the housing you are proposing, e.g., access to transportation, physical or mental impairments or disabilities?

CWD offers affordable housing to low and moderate income households. If there is a language barrier, CWD will seek translation assistance. CWD currently works with numerous groups serving people with disabilities. CWD is responsive to accommodating the special needs of these residents. We have made numerous accommodations to our apartments to make them more accessible to our residents with physical disabilities. At Yahara River View Apartments, we created raised bed gardens to provide gardening opportunities for people of all abilities. We also work with residents with other special needs.

12. EXPERIENCE: Please describe your agency's affordable housing development experience, qualifications of proposed project staff, financial capacity of your agency to complete your proposed project, and past performance that will contribute to the success of the proposed program. How many affordable housing units has your agency created and managed in the past five years?

CWD has a successful 33-year track record of neighborhood revitalization with a history of acquiring and rehabilitating older properties and creating new housing development to provide affordable housing. CWD's housing goals include creating affordable housing for people with limited incomes and preserving and improving older housing stock while preserving the community's socio-economic diversity. Currently, CWD owns and manages 99 units of rental housing with consistently high occupancy rates. CWD recently purchased three foreclosed properties and provided substantial rehabilitation. Jenifer Place will open in August and provide 12 affordable apartments on Madison's east side. CWD already has 35 applications for these 12 apartments. Paul Jasenski, Housing Development Manager, has worked at CWD for 24 years on acquisition, rehabilitation, construction management, financing, and management of CWD's housing projects. Paul has put together numerous affordable housing projects including the highly successful Falconer Cooperative, Yahara River View Apartments and Jenifer Place. Ted Parker, Financial Manager, has over 24 years of financial non-profit management experience. He is responsible for CWD's annual operating budget of 1.6 million dollars. Marianne Morton has over 30 years of community and economic development experience and is skilled in pulling together funding sources, mobilizing community support and delivering programs and projects. Diane Eddings, Housing Manager, has over 12 years of housing management experience including affirmative marketing, outreach, tenant relations and tax credit compliance. Jill Oelke, Housing Specialist, has over 30 years experience in the real estate field. Staff's long term tenure at CWD shows their effectiveness and commitment to providing affordable housing opportunities.

13. RISK: Please describe the level of risk your agency will be taking with this project. Please describe any fees you will be charging to the participant.

CWD has a 29 year history of providing affordable housing. Expansion into SW Madison is a significant change for us. We recognize that developments in SW Madison will have greater risk and will need to be underwritten and managed carefully. We will coordinate with the Housing Organizer, JFF and Department of Health staff.

14. STAFF: Project Staff: Staff Titles, FTE dedicated to this project and required qualifications for project staff.

Staff Title	FTE	Credentials/Qualifications
Housing Development Manager	0.75	Acquisition, rehabilitation, management
Financial Manager	0.16	Experience as a non-profit Financial Manager

ORGANIZATION:

Organization Name: Common Wealth Development

PROGRAM/LETTER:

B Program B Rental Housing

15. PARTICIPANT INCOME LEVELS:

Indicate the number of households at each income level that this project would serve in 2013.

Income Level	Number of Households
Over 80% county median income	0
61% - 80% county median income	6
51% - 60% county median income	0
30% - 50% county median income	2
Less than 30% of county median income	0
Total households to be served	8

16. If projections for 2014 will vary significantly from 2013, complete the following:

Income Level for 2014	Number of Households
Over 80% county median income	0
61% - 80% county median income	0
51% - 60% county median income	0
30% - 50% county median income	0
Less than 30% of county median income	0
Total households to be served	0

17. AGENCY COST ALLOCATION PLAN: If you plan to include a portion of indirect costs in your project budget, describe the method your agency uses to determine indirect cost allocations in your project.

Indirect costs shared by all programs are split on a pro rata share based on individual program staff hours divided by total agency staff hours.

18. PROJECT ACTIVITIES: Describe activities/benchmarks by timeline to illustrate how your project will be implemented (such as acquisition, start of construction, end of construction, available for occupancy).

Activity Benchmark	Est. Month of Completion
Site Control	March 2013, 2014
Lead Paint Assessment	March 2013, 2014
Final Specs and Plans	April 2013, 2014
Financing Secured	April 2013, 2014
Real Estate Closing	May 2013, 2014
Rehabilitation	May, June 2013, 14
Rent Up	July, Aug 2013, 14

ORGANIZATION:	Organization Name: Common Wealth Development
PROGRAM/LETTER:	B Program B Rental Housing

DEMOGRAPHICS

Complete the following chart for unduplicated participants served by your agency's rental program in 2011. Indicate the number and percentage by the following characteristics. For new projects, please identify projected participant numbers and descriptors.

DESCRIPTOR	Part. #	Part. %	Staff #	Staff %	DESCRIPTOR	Part. #	Part. %	Staff #	Staff %
TOTAL	168	100%	6	100%	RESIDENCY				
MALE	84	50%	3	50%	CITY OF MADISON	168	100%		
FEMALE	84	50%	3	50%	DANE COUNTY (NOT IN CITY)	0	0%		
UNKNOWN/OTHER	0	0%	0	0%	OUTSIDE DANE COUNTY	0	0%		
					TOTAL RESIDENCY	168	100%		
					AGE				
					<2	1	1%		
					2 - 5	9	5%		
					6 - 12	13	8%		
					13 - 17	8	5%		
					18 - 29	25	15%		
					30 - 59	87	52%		
					60 - 74	20	12%		
					75 & UP	5	3%		
					TOTAL AGE	168	100%		
					RACE				
					WHITE/CAUCASIAN	143	85%	6	100%
					BLACK/AFRICAN AMERICAN	13	8%	0	0%
					ASIAN	5	3%	0	0%
					AMERICAN INDIAN/ALASKAN NATIVE	1	1%	0	0%
					NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%
					MULTI-RACIAL:	3	2%	0	0%
					Black/AA & White/Caucasian	2	67%	0	0%
					Asian & White/Caucasian	0	0%	0	0%
					Am Indian/Alaskan Native & White/Caucasian	1	33%	0	0%
					Am Indian/Alaskan Native & Black/AA	0	0%	0	0%
					BALANCE/OTHER	3	2%	0	0%
					TOTAL RACE	168	100%	6	100%
					ETHNICITY				
					HISPANIC OR LATINO	18	11%	0	0%
					NOT HISPANIC OR LATINO	150	89%	6	100%
					TOTAL ETHNICITY	168	100%	6	100%
					PERSONS WITH DISABILITIES	43	26%	0	0%

Part. = Participant

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:	Organization Name: Common Wealth Development
PROGRAM/LETTER:	B Program B Rental Housing

PROJECT OUTCOMES

Number of unduplicated individual participants served during 2011.	168
Total to be served in 2013.	up to 208

Complete the following for each project outcome. No more than two outcomes per project will be reviewed.
 Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	Improve the quality of rental units available to lower income individuals in SW Madison by improving the housing stock.
Performance Indicator(s):	Acquire and rehabilitate 16 units of rental housing

Proposed for 2013:	Total to be considered in <input style="width: 50px; text-align: center;" type="text" value="8"/> perf. measurement	Targeted % to meet perf. measures <input style="width: 50px; text-align: center;" type="text" value="100%"/>	Targeted # to meet perf. measure <input style="width: 50px; text-align: center;" type="text" value="8"/>
Proposed for 2014:	Total to be considered in <input style="width: 50px; text-align: center;" type="text" value="8"/> perf. measurement	Targeted % to meet perf. measures <input style="width: 50px; text-align: center;" type="text" value="100%"/>	Targeted # to meet perf. measure <input style="width: 50px; text-align: center;" type="text" value="8"/>

Explain the measurement tools or methods:	Purchase 16 units of rental housing. Provide rehabilitation including removal of lead paint and asbestos, accessibility features, and energy efficient upgrades when feasible. Create units that are decent, safe and desirable for apartment living.
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Outcome Objective # 2:	Improve the quality of rental units available to lower income individuals in SW Madison by providing effective management.
Performance Indicator(s):	Own and manage 16 units of rental housing in SW Madison for households at or below 50% or 80% of Dane County Median Income.

Proposed for 2013:	Total to be considered in <input style="width: 50px; text-align: center;" type="text" value="8"/> perf. measurement	Targeted % to meet perf. measures <input style="width: 50px; text-align: center;" type="text" value="100%"/>	Targeted # to meet perf. measure <input style="width: 50px; text-align: center;" type="text" value="8"/>
Proposed for 2014:	Total to be considered in <input style="width: 50px; text-align: center;" type="text" value="8"/> perf. measurement	Targeted % to meet perf. measures <input style="width: 50px; text-align: center;" type="text" value="100%"/>	Targeted # to meet perf. measure <input style="width: 50px; text-align: center;" type="text" value="8"/>

Explain the measurement tools or methods:	Market the apartments to 4 households under 50% of Dane County Median Income and 12 households under 80% of Dane County Median Income. Effectively screen prospective tenants. Sign leases with approved tenants. Maintain the property and units through preventive maintenance measures and by responding to tenant complaints and requests in a timely fashion. Respond to tenants promptly regarding tenant conflicts, safety concerns and questions.
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ORGANIZATION: Organization Name: Common Wealth Development

1. Provide the following information for rental housing projects (list each address with unit number separately).

Address/Unit Number	# Bedrooms	Req. Amount of CD \$	Proj. Income Category*	Proj. Monthly Unit Rent	Includes Utilities?
unknown-4 units	1, 2 or 3	216,000	30-50%	unknown	No
unknown-12 units	1, 2 or 3	648,000	50-80%	unknown	No

*Less than or equal to 30% CMI, 31-50% CMI, 51-60% CMI, 61-80% CMI, >80% CMI

2. Identify if your project includes any of the following features (Check all that apply):

Incorporates accessibility features	X
Incorporates energy efficiency features	X
Involves lead paint removal	X
Involves asbestos removal	X
Incorporates long term affordability restrictions greater than that required by the HOME rules	

3. For projects that include rehabilitation, have you completed a capital needs plan for this property? Describe.

Sites have not yet been selected.

4. Do you qualify as a Community Housing Development Organization (CHDO)? Yes

5. MATCH: Please describe if you could provide non-federal matching funds for this project. If yes, describe amount and source of matching funds.

Common Wealth Development will secure first mortgage financing. Common Wealth Development will seek possible grant funds for energy efficiency and lead/asbestos removal.

6. FUNDS NEEDED: Please describe why CDD funds are needed and how you can ensure the project will be viable.

Common Wealth Development will secure first mortgage financing and equity for this project. The remaining funds will come from another source. Common Wealth Development has successfully used CDBG HOME funds for many housing projects in the past.

ORGANIZATION: **Organization Name: Common Wealth Development**

7. Real Estate Project Data Summary

Enter the site address (or addresses) for the proposed project and answer the identified questions by column for each address site.

	# of Units Prior to Purchase	# of Units Post- Project	# Units Occupied	# Tenants to be Displaced	Appraised Value Current	Appraised Value Post-Project	Purchase Price	Accessible Current?	Post-Project Accessible?
Address:	8	8	0	0	unknown	unknown	unknown	No	Yes
Address:									
Address:									
Address:									
Address:									

If no specific site has been identified, use the average of the high-low range or your best estimate of costs.

ORGANIZATION: ORGANIZATION

8. CAPITAL BUDGET

Enter the proposed project capital budget. Identify the fund source and terms and whether the funds have been already committed or are proposed. **Place a C next to source if funds have already been committed and a P next to source if the fund source is proposed.** Ex.: Acquisition: \$300,000 HOME (P), \$100,000 from CDBG (P), \$200,000 from Anchor Bank @5% interest/15 years (C).

	TOTAL	Amount	Source/Terms**	Amount	Source/Terms**
Acquisition Costs:					
Acquisition	575,000	393,000	HOME Funds - P	182,000	First Mortgage Amount -P
Title Insurance and Recording	2,800	1,500	HOME Funds - P	1,300	First Mortgage Amount -P
Appraisal	2,400	600	HOME Funds - P	1,800	First Mortgage Amount -P
Predvlpmnt/feasibility/market study*	0	0		0	
Survey	0	0		0	
Marketing*	3,000	3,000		0	
Relocation	0	0		0	
Other (List)					
	0	0		0	
Construction:					
Construction Costs	122,500			122,500	First Mortgage Amount -P
Soils/Site Preparation	0	0		0	
Construction Mgmt	5,000	0	HOME Funds - P	5,000	First Mortgage Amount -P
Landscaping, Play Lots, Signage	5,000	0		5,000	First Mortgage Amount -P
Construction Interest	4,000	0		4,000	First Mortgage Amount -P
Permits; Print Plans/Specs	1,500	1,500	HOME Funds - P		First Mortgage Amount -P
Other (List)					
	0	0		0	
Fees:					
Architect	3,000	0		3,000	First Mortgage Amount -P
Engineering	0	0		0	
Accounting*	1,000	0		1,000	First Mortgage Amount -P
Legal*	2,000	0		2,000	First Mortgage Amount -P
Development Fee*	64,800	32,400	HOME Funds - P	32,400	First Mortgage Amount -P
Leasing Fee*	0	0		0	
Other (List)					
	0	0		0	
Project Contingency:	12,000	0		12,000	1st Mortgage /Equity -P
Furnishings:	0	0		0	
Reserves Funded from Capital:					
Operating Reserve	8,000			8,000	First Mortgage Amount -P
Replacement Reserve	0	0		0	
Maintenance Reserve	0	0		0	
Vacancy Reserve	0	0		0	
Lease Up Reserve	6,406	0		6,406	First Mortgage Amount -P
Other: (List)					
	0	0		0	
TOTAL COSTS:	818,406	432,000		386,406	

If CDBG funds are used for items with an asterisk (), the total cost of these items may not exceed 15% of the CDBG amount.

**Note: Each amount for each source must be listed separately, i.e., Acquisition: \$30,000 HOME, \$125,000 Capitol Revolving Fund. Identify if grant or loan and terms.

ORGANIZATION:

ORGANIZATION

9. TOTAL PROJECT PROFORMA

Enter total Revenue and Expense information for the proposed project for a 15 year period.

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Revenue:						
Gross Income	64,800	66,420	68,081	69,783	71,527	73,315
Less Vacancy/Bad Debt	3,240	3,321	3,404	3,489	3,576	3,666
Income from Non-Residential Use*	0	0	0	0	0	0
Total Revenue	61,560	63,099	64,676	66,293	67,951	69,649
Expenses:						
Office Expenses and Phone	1,872	1,928	1,986	2,046	2,107	2,170
Real Estate Taxes		0	0	0	0	0
Advertising, Accounting, Legal Fees	2,704	2,785	2,869	2,955	3,043	3,135
Payroll, Payroll Taxes and Benefits		0	0	0	0	0
Property Insurance	2,184	2,250	2,317	2,387	2,458	2,532
Mtc, Repairs and Mtc Contracts	7,260	7,478	7,702	7,933	8,171	8,416
Utilities (gas/electric/fuel/water/sewer)	6,120	6,304	6,493	6,687	6,888	7,095
Property Mgmt	4,136	4,260	4,388	4,520	4,655	4,795
Operating Reserve Pmt	2,600	2,678	2,758	2,841	2,926	3,014
Replacement Reserve Pmt	3,008	3,098	3,191	3,287	3,386	3,487
Support Services	0	0	0	0	0	0
Other (List)						
Permits & Fees	588	606	624	643	662	682
	0	0	0	0	0	0
Total Expenses	30,472	31,386	32,328	33,298	34,297	35,325
Net Operating Income	31,088	31,713	32,349	32,996	33,654	34,324
Debt Service:						
First Mortgage	27,033	27,033	27,033	27,033	27,033	27,033
Second Mortgage	0	0	0	0	0	0
Other (List)						
	0	0	0	0	0	0
	0	0	0	0	0	0
Total Debt Service	27,033	27,033	27,033	27,033	27,033	27,033
Total Annual Cash Expenses	57,505	58,419	59,361	60,331	61,330	62,358
Total Net Operating Income	4,055	4,680	5,316	5,963	6,621	7,291
Debt Service Reserve	0	0	0	0	0	0
Cash Flow	4,055	4,680	5,316	5,963	6,621	7,291

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

Assumptions

Vacancy Rate	5.0%
Annual Increase	2.5%
Other	
2.5% Income, 3% operating expenses/yr	

Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
75,148	77,027	78,953	80,926	82,949	85,023	87,149	89,328	91,561
3,757	3,851	3,948	4,046	4,147	4,251	4,357	4,466	4,578
0	0	0	0	0	0	0	0	0
71,391	73,175	75,005	76,880	78,802	80,772	82,791	84,861	86,983

2,235	2,302	2,371	2,443	2,516	2,591	2,669	2,749	2,832
0	0	0	0	0	0	0	0	0
3,229	3,326	3,425	3,528	3,634	3,743	3,855	3,971	4,090
0	0	0	0	0	0	0	0	0
2,608	2,686	2,767	2,850	2,935	3,023	3,114	3,207	3,303
8,669	8,929	9,197	9,473	9,757	10,050	10,351	10,662	10,981
7,308	7,527	7,753	7,985	8,225	8,472	8,726	8,987	9,257
4,939	5,087	5,239	5,397	5,558	5,725	5,897	6,074	6,256
3,105	3,198	3,294	3,392	3,494	3,599	3,707	3,818	3,933
3,592	3,699	3,810	3,925	4,043	4,164	4,289	4,417	4,550
0	0	0	0	0	0	0	0	0

702	723	745	767	790	814	838	863	889
0	0	0	0	0	0	0	0	0
36,385	37,477	38,601	39,759	40,952	42,180	43,446	44,749	46,092
35,006	35,699	36,404	37,121	37,850	38,592	39,346	40,112	40,891

27,033	27,033	27,033	27,033	27,033	27,033	27,033	27,033	27,033
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
27,033	27,033	27,033	27,033	27,033	27,033	27,033	27,033	27,033
63,418	64,510	65,634	66,792	67,985	69,213	70,479	71,782	73,125
7,973	8,666	9,371	10,088	10,817	11,559	12,313	13,079	13,858
0	0	0	0	0	0	0	0	0
7,973	8,666	9,371	10,088	10,817	11,559	12,313	13,079	13,858

ORGANIZATION: Organization Name: Common Wealth Development

8. CAPITAL BUDGET

Enter the proposed project capital budget. Identify the fund source and terms and whether the funds have been already committed or are proposed. **Place a C next to source if funds have already been committed and a P next to source if the fund source is proposed.** Ex.: Acquisition: \$300,000 HOME (P), \$100,000 from CDBG (P), \$200,000 from Anchor Bank @5% interest/15 years (C).

	TOTAL	Amount	Source/Terms**	Amount	Source/Terms**
Acquisition Costs:					
Acquisition	600,000	393,000	HOME Funds - P	207,000	First Mortgage Amount -P
Title Insurance and Recording	2,800	1,500	HOME Funds - P	1,300	First Mortgage Amount -P
Appraisal	2,400	600	HOME Funds - P	1,800	First Mortgage Amount -P
Predvlpmnt/feasibility/market study*	0	0		0	
Survey	0	0		0	
Marketing*	3,000	3,000		0	
Relocation	0	0		0	
Other (List)					
	0	0		0	
Construction:					
Construction Costs	140,000			140,000	First Mortgage Amount -P
Soils/Site Preparation	0	0		0	
Construction Mgmt	8,000	0	HOME Funds - P	8,000	First Mortgage Amount -P
Landscaping, Play Lots, Signage	8,000	0		8,000	First Mortgage Amount -P
Construction Interest	6,000	0		6,000	First Mortgage Amount -P
Permits; Print Plans/Specs	2,000	1,500	HOME Funds - P	500	First Mortgage Amount -P
Other (List)					
	0	0		0	
Fees:					
Architect	4,000	0		4,000	First Mortgage Amount -P
Engineering	0	0		0	
Accounting*	1,000	0		1,000	First Mortgage Amount -P
Legal*	4,000	0		4,000	First Mortgage Amount -P
Development Fee*	64,800	32,400	HOME Funds - P	32,400	First Mortgage Amount -P
Leasing Fee*	0	0		0	
Other (List)					
	0	0		0	
Project Contingency:					
	20,000	0		20,000	1st Mortgage /Equity -P
Furnishings:					
	0	0		0	
Reserves Funded from Capital:					
Operating Reserve	8,000			8,000	First Mortgage Amount -P
Replacement Reserve	0	0		0	
Maintenance Reserve	0	0		0	
Vacancy Reserve	0	0		0	
Lease Up Reserve	6,000	0		6,000	First Mortgage Amount -P
Other: (List)					
	0	0		0	
TOTAL COSTS:	880,000	432,000		448,000	

If CDBG funds are used for items with an asterisk (), the total cost of these items may not exceed 15% of the CDBG amount.

**Note: Each amount for each source must be listed separately, i.e., Acquisition: \$30,000 HOME, \$125,000 Capitol Revolving Fund. Identify if grant or loan and terms.

ORGANIZATION: Organization Name: Common Wealth Development

9. TOTAL PROJECT PROFORMA

Enter total Revenue and Expense information for the proposed project for a 15 year period.

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Revenue:						
Gross Income	64,800	66,420	68,081	69,783	71,527	73,315
Less Vacancy/Bad Debt	-3,240	-3,321	-3,404	-3,489	-3,576	-3,666
Income from Non-Residential Use*	0	0	0	0	0	0
Total Revenue	68,040	69,741	71,485	73,272	75,103	76,981
Expenses:						
Office Expenses and Phone	1,872	1,928	1,986	2,046	2,107	2,170
Real Estate Taxes		0	0	0	0	0
Advertising, Accounting, Legal Fees	2,704	2,785	2,869	2,955	3,043	3,135
Payroll, Payroll Taxes and Benefits		0	0	0	0	0
Property Insurance	2,184	2,250	2,317	2,387	2,458	2,532
Mtc, Repairs and Mtc Contracts	7,260	7,478	7,702	7,933	8,171	8,416
Utilities (gas/electric/fuel/water/sewer)	6,120	6,304	6,493	6,687	6,888	7,095
Property Mgmt	4,136	4,260	4,388	4,520	4,655	4,795
Operating Reserve Pmt	2,600	2,678	2,758	2,841	2,926	3,014
Replacement Reserve Pmt	3,008	3,098	3,191	3,287	3,386	3,487
Support Services	0	0	0	0	0	0
Other (List)						
Permits & Fees	588	606	624	643	662	682
	0	0	0	0	0	0
Total Expenses	30,472	31,386	32,328	33,298	34,297	35,325
Net Operating Income	37,568	38,355	39,157	39,974	40,807	41,656
Debt Service:						
First Mortgage	32,668	32,668	32,668	32,668	32,668	32,668
Second Mortgage	0	0	0	0	0	0
Other (List)						
	0	0	0	0	0	0
	0	0	0	0	0	0
Total Debt Service	32,668	32,668	32,668	32,668	32,668	32,668
Total Annual Cash Expenses	63,140	64,054	64,996	65,966	66,965	67,993
Total Net Operating Income	4,900	5,687	6,489	7,306	8,139	8,988
Debt Service Reserve	0	0	0	0	0	0
Cash Flow	4,900	5,687	6,489	7,306	8,139	8,988

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

Assumptions

Vacancy Rate	5.0%
Annual Increase	2.5%
Other	
2.5% Income, 3% operating expenses/yr	

Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
75,148	77,027	78,953	80,926	82,949	85,023	87,149	89,328	91,561
-3,757	-3,851	-3,948	-4,046	-4,147	-4,251	-4,357	-4,466	-4,578
0	0	0	0	0	0	0	0	0
78,906	80,878	82,900	84,973	87,097	89,274	91,506	93,794	96,139

2,235	2,302	2,371	2,443	2,516	2,591	2,669	2,749	2,832
0	0	0	0	0	0	0	0	0
3,229	3,326	3,425	3,528	3,634	3,743	3,855	3,971	4,090
0	0	0	0	0	0	0	0	0
2,608	2,686	2,767	2,850	2,935	3,023	3,114	3,207	3,303
8,669	8,929	9,197	9,473	9,757	10,050	10,351	10,662	10,981
7,308	7,527	7,753	7,985	8,225	8,472	8,726	8,987	9,257
4,939	5,087	5,239	5,397	5,558	5,725	5,897	6,074	6,256
3,105	3,198	3,294	3,392	3,494	3,599	3,707	3,818	3,933
3,592	3,699	3,810	3,925	4,043	4,164	4,289	4,417	4,550
0	0	0	0	0	0	0	0	0

702	723	745	767	790	814	838	863	889
0	0	0	0	0	0	0	0	0
36,385	37,477	38,601	39,759	40,952	42,180	43,446	44,749	46,092
42,520	43,401	44,299	45,214	46,145	47,094	48,060	49,045	50,047

32,668	32,668	32,668	32,668	32,668	32,668	32,668	32,668	32,668
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
32,668	32,668	32,668	32,668	32,668	32,668	32,668	32,668	32,668
69,053	70,145	71,269	72,427	73,620	74,848	76,114	77,417	78,760
9,852	10,733	11,631	12,546	13,477	14,426	15,392	16,377	17,379
0	0	0	0	0	0	0	0	0
9,852	10,733	11,631	12,546	13,477	14,426	15,392	16,377	17,379

ORGANIZATION:
PROGRAM/LETTER:

Organization Name: Common Wealth Development
B Program B Affordable Rental Housing

10. PROGRAM BUDGET

a. 2012 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	197,050	29,557	0	0	167,493
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER	323,022	0	0	0	323,022
TOTAL REVENUE	520,072	29,557	0	0	490,515

b. 2013 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	432,000	64,800	0	0	367,200
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	386,406	0	0	0	386,406
TOTAL REVENUE	818,406	64,800	0	0	753,606

*OTHER GOVT 2013

Source	Amount	Terms
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2013

Source	Amount	Terms
First Mortgage	356,406	6.5% 30 yr. amortization
Equity	30,000	CWD contribution
	0	
	0	
	0	
TOTAL	386,406	

ORGANIZATION:	Organization Name: Common Wealth Development
PROGRAM/LETTER:	B Program B Affordable Rental Housing

11. 2014 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2013 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

a. PROGRAM UPDATE: If requesting more than 2013, describe any major changes being proposed for the program/service in 2014, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (w ith spaces) (2 lines max.)

b. 2014 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2013-2014.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2013 and 2014.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (w ith spaces) (2 lines max.)

c. 2014 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

*OTHER GOVT 2014

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2014

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

ORGANIZATION:	Organization Name: Common Wealth Development
PROGRAM/LETTER:	B Program B Affordable Rental Housing

10. PROGRAM BUDGET

a. 2012 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	197,050	29,557	0	0	167,493
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER	323,022	0	0	0	323,022
TOTAL REVENUE	520,072	29,557	0	0	490,515

b. 2013 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	432,000	64,800	0	0	367,200
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	430,697	0	0	0	430,697
TOTAL REVENUE	862,697	64,800	0	0	797,897

*OTHER GOVT 2013

Source	Amount	Terms
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2013

Source	Amount	Terms
First Mortgage	430,697	6.5% 30 yr. amortization
	0	
	0	
	0	
TOTAL	430,697	

ORGANIZATION:	Organization Name: Common Wealth Development
PROGRAM/LETTER:	B Program B Affordable Rental Housing

11. 2014 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2013 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

a. PROGRAM UPDATE: If requesting more than 2013, describe any major changes being proposed for the program/service in 2014, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (w ith spaces) (2 lines max.)

b. 2014 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2013-2014.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2013 and 2014.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (w ith spaces) (2 lines max.)

c. 2014 PROPOSED BUDGET

REVENUE SOURCE	BUDGET TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	0	0	0	0	0
TOTAL REVENUE	0	0	0	0	0

*OTHER GOVT 2014

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2014

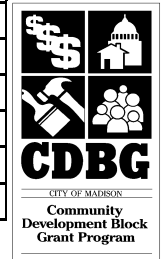
Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

APPLICATION FOR 2013-2014 FUNDS



1. AGENCY CONTACT INFORMATION

Organization	Organization Name: Common Wealth Development	
Mailing Address	1501 Williamson Street, Madison, WI 53703	
Telephone	256-3527	
FAX	256-4499	
Admin Contact	Marianne Morton	
Financial Contact	Ted Parker	
Website	www.cwd.org	
Email Address	marianne@cwd.org	
Legal Status	Private: Non-Profit	
Federal EIN:	39-1323500	
State CN:		
DUNS #	30460778	



2. SIGNATURE PAGE

AFFIRMATIVE ACTION

If funded, applicant hereby agrees to comply with 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 www.cityofmadison.com/dcr/aaForms.cfm.

LIVING WAGE ORDINANCE

If funded, applicant hereby agrees to comply with City of Madison Ordinance 4.20. The Madison Living Wage for 2013 will be **\$12.19 (hourly)**. This reflects a 3% increase over Madison Living Wage for 2012, and is consistent with prior annual increases.

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.

3. SIGNATURE

Enter name:

By entering your initials in the box you are electronically signing your name and agreeing to the terms listed above

DATE

AGENCY CONTACT INFORMATION

ORGANIZATION **Organization Name: Common Wealth Development**

1. AGENCY CONTACT INFORMATION

A	Program A Youth Business Mentoring Program	OCS: Youth A2: Youth Employment (CSC)										
	Contact: Aronn Peterson	New Prg?	No	Phone:	256-3527x18	Email:	aronn@cwd.org					
B	Program B Affordable Rental Housing	CDBG: D. Housing - Rental housing (CDBG)										
	Contact: Paul Jasenski	New Prg?	No	Phone:	256-3527x14	Email:	paul@cwd.org					
C	Program C											
	Contact:	New Prg?		Phone:		Email:						
D	Program D	Select an Objective Statement from the Drop-Down										
	Contact:	New Prg?		Phone:		Email:						
E	Program E	Select an Objective Statement from the Drop-Down										
	Contact:	New Prg?		Phone:		Email:						
F	Program F	Select an Objective Statement from the Drop-Down										
	Contact:	New Prg?		Phone:		Email:						
G	Program G	Select an Objective Statement from the Drop-Down										
	Contact:	New Prg?		Phone:		Email:						
H	Program H	Select an Objective Statement from the Drop-Down										
	Contact:	New Prg?		Phone:		Email:						

2. AGENCY REVENUE DETAILED BY PROGRAM

REVENUE SOURCE	2011 ACTUAL	2012 BUDGET	2013-14 PROPOSED	2013-14 PROPOSED PROGRAMS								Non-City	
				A	B	C	D	E	F	G	H		
DANE CO HUMAN SVCS	118,400	118,400	118,400	118,400	0	0	0	0	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0	0	0	0	0	0	0
MADISON-COMM SVCS	71,998	71,998	74,158	74,158	0	0	0	0	0	0	0	0	0
MADISON-CDBG	452,300	197,050	432,000	0	432,000	0	0	0	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0	0	0	0	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0	0	0	0	0	0	0	0	0
OTHER GOVT	6,864	0	0	0	0	0	0	0	0	0	0	0	0
FUNDRAISING DONATIONS	143,526	268,608	246,895	100,836	0	0	0	0	0	0	0	0	146,059
USER FEES	1,123,637	1,111,679	1,201,542	0	0	0	0	0	0	0	0	0	1,201,542
OTHER	150,132	323,022	430,697	0	430,697	0	0	0	0	0	0	0	0
TOTAL REVENUE	2,066,857	2,090,757	2,503,692	293,394	862,697	0	0	0	0	0	0	0	1,347,601

3. AGENCY ORGANIZATIONAL PROFILE

a. AGENCY MISSION STATEMENT

Common Wealth Development's mission is "To continue to build and sustain a vibrant, diverse, engaged, inclusive and safe community". Common Wealth's goals are: 1) to provide job training, placement, financial education and mentoring for low-income teens; 2) to promote the creation of new living wage jobs; 3) to create affordable housing; 4) to preserve and improve existing housing stock; and 5) to involve the people living and working in our neighborhoods in community-building activities.

b. AGENCY EXPERIENCE AND QUALIFICATIONS

CWD has a successful 33-year track record of neighborhood revitalization and has completed many innovative programs and initiatives that have improved our community through development of quality affordable and accessible housing; creation of jobs for low-moderate income households; and access for teens to employment opportunities, earned income and supportive relationships with adult mentors. CWD has a diverse and experienced staff committed to carrying out its mission. CWD's Executive Director, Marianne Morton, has 31 years of community and economic development experience and is skilled in putting together financing sources, mobilizing community support and delivering programs and initiatives. CWD's Financial Manager, Ted Parker, has over 24 years of non-profit financial management experience. Common Wealth's Program Managers for business, youth and housing –have a combined total of 48 years of non-profit experience. Common Wealth's staff is skilled and experienced in working with people from a wide variety of cultural and racial backgrounds. They regularly attend trainings and stay abreast of best practices on working with culturally diverse and high-needs populations. CWD acquires and rehabilitates older properties and creates new housing development to provide affordable housing. Currently, CWD owns and manages 99 units of rental housing. CWD recently purchased three foreclosed properties on Madison's east side and provided substantial rehabilitation. Jenifer Place will open in August and provide 12 affordable apartments. With 35 years of combined work with CWD, housing staff's long term tenure at CWD shows their effectiveness and commitment to providing affordable housing opportunities. Since launching our Youth Program twenty-two years ago, CWD has provided over 7,000 youth with opportunities to improve their quality of life by economically empowering themselves. CWD's employment and financial programs enable low-income and at-risk youth to develop and apply employment and money management skills, explore careers and higher education, and have access to employment opportunities, earned income, matched savings accounts and supportive relationships with adult mentors. CWD's long-history of delivering need-based and result-producing employment programs to economically disadvantaged and at-risk youth led to CWD receiving the 2007 Governor's Award for Financial Literacy.

4. AGENCY GOVERNING BODY

How many Board meetings were held in 2011?	12
How many Board meetings has your governing body or Board of Directors scheduled for 2012?	12
How many Board seats are indicated in your agency by-laws?	from 6 to 18

Please list your current Board of Directors or your agency's governing body.

Name	Michael Dilorio				
Home Address	941 Spaight Street, Madison, WI 53703				
Occupation	Licensed Practical Nurse				
Representing	Neighborhood Individual				
Term of Office		From:	12/2011	To:	12/2013
Name	Laura Guyer				
Home Address	1 Fen Oak Court, Madison, WI 53718				
Occupation	Dane Co. Land and Water Resources				
Representing	Dane County Individual				
Term of Office		From:	03/2011	To:	12/2012
Name	Joann Kelley				
Home Address	4333 Crawford Drive, Madison, WI 53711				
Occupation	Residential and Community Services, MGE				
Representing	Neighborhood Organization				
Term of Office		From:	06/2011	To:	12/2012
Name	Eric Kestin				
Home Address	11 Anniversary Court, Madison, WI 53704				
Occupation	Investigator/Conciliator 3, City of Madison Department of Civil Rights				
Representing	Dane County Individual				
Term of Office		From:	04/2011	To:	12/2013
Name	Connie Kilmark				
Home Address	211 S. Paterson Street, #215, Madison, WI 53703				
Occupation	Director, Kilmark and Associates				
Representing	Neighborhood Individual				
Term of Office		From:	08/2011	To:	08/2012
Name	David Kohli				
Home Address	1256 Spaight Street, #2, Madison, WI 53703				
Occupation	Owner, Perfect Circle Cycling				
Representing	Neighborhood Individual				
Term of Office		From:	01/2012	To:	12/2012
Name	Russ Lerum				
Home Address	706 S. Baldwin Street, Madison, WI 53703				
Occupation	Senior Mechanical Engineer, Retired				
Representing	Neighborhood Individual				
Term of Office		From:	12/2010	To:	12/2012
Name	Truly Remarkable Loon				
Home Address	1134 Spaight Street, Madison, WI 53703				
Occupation	Self-Employed Entertainer				
Representing	Neighborhood Individual				
Term of Office		From:	12/2010	To:	12/2012

AGENCY GOVERNING BODY cont.

Name	David Marshall			
Home Address	574 Troy Drive, Madison, WI 53704			
Occupation	Program Specialist, Dane Co. Department of Human Services			
Representing	Dane County Individual			
Term of Office		From:	04/2011	To: 12/2012
Name	Robert Paolino			
Home Address	825 Troy Drive, Madison, WI 53704			
Occupation	Senior Legislative Analyst, WI Legislative Reference Bureau			
Representing	Dane County Individual			
Term of Office		From:	04/2011	To: 12/2013
Name	Michael Rosenberg			
Home Address	1302 Rutledge Street, Madison, WI 53703			
Occupation	Attorney			
Representing	Neighborhood Individual			
Term of Office		From:	12/2011	To: 12/2013
Name	Michelle Rutta-Wahe			
Home Address	100 Coyle Parkway, Cottage Grove, WI 53527			
Occupation	Owner, Your Heart's Content			
Representing	Dane County Organization			
Term of Office		From:	12/2011	To: 12/2013
Name	Elisabeth Shea			
Home Address	3122 Atwood Avenue, Madison, WI 53704			
Occupation	Attorney			
Representing	Neighborhood Individual			
Term of Office		From:	12/2010	To: 12/2012
Name	Kate Stalker			
Home Address	2033 Rutledge Street, Madison, WI 53704			
Occupation	Principal, KSA Demographic			
Representing	Neighborhood Individual			
Term of Office		From:	01/2012	To: 12/2013
Name	George Swamp			
Home Address	5771 Chapel Valley Road, Madison, WI 53711			
Occupation	School Social Worker, Madison Metropolitan School District			
Representing	Dane County Individual			
Term of Office		From:	01/2012	To: 12/2013
Name	Polly Westmont			
Home Address	1131 Jenifer Street, Madison, WI 53703			
Occupation	Shift Worker, Williamson Street Grocery Co-op			
Representing	Dane County Individual			
Term of Office		From:	12/2011	To: 12/2013
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy

AGENCY GOVERNING BODY cont.

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

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Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

5. STAFF-BOARD-VOLUNTEER DEMOGRAPHICS

Indicate by number the following characteristics for your agency's current staff, board and volunteers.

Refer to application instructions for definitions. You will receive an "ERROR" until completing the demographic information.

DESCRIPTOR	STAFF		BOARD		VOLUNTEER	
	Number	Percent	Number	Percent	Number	Percent
TOTAL	16	100%	16	100%	85	100%
GENDER						
MALE	7	44%	9	56%	37	44%
FEMALE	9	56%	7	44%	48	56%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	16	100%	16	100%	85	100%
AGE						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	14	88%	12	75%	81	95%
60 AND OLDER	2	13%	4	25%	4	5%
TOTAL AGE	16	100%	16	100%	85	100%
RACE*						0
WHITE/CAUCASIAN	13	81%	14	88%	52	61%
BLACK/AFRICAN AMERICAN	3	19%	0	0%	16	19%
ASIAN	0	0%	0	0%	8	9%
AMERICAN INDIAN/ALASKAN NATIVE	0	0%	1	6%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	1	6%	4	5%
Black/AA & White/Caucasian	0	0%	0	0%	3	75%
Asian & White/Caucasian	0	0%	0	0%	0	0%
Am Indian/Alaskan Native & White/Caucasian	0	0%	1	100%	1	25%
Am Indian/Alaskan Native & Black/AA	0	0%	0	0%	0	0%
BALANCE/OTHER	0	0%	0	0%	5	6%
TOTAL RACE	16	100%	16	100%	85	100%
ETHNICITY						
HISPANIC OR LATINO	0	0%	0	0%	5	6%
NOT HISPANIC OR LATINO	16	100%	16	100%	80	94%
TOTAL ETHNICITY	16	100%	16	100%	85	100%
PERSONS WITH DISABILITIES	0	0%	0	0%	0	0%

*These categories are identified in HUD standards.

6. AGENCY EXPENSE BUDGET

This chart describes your agency's total expense budget for 3 separate years.

Where possible, use audited figures for 2011 Actual.

The subtotals for the 2012 BUDGET and 2013-14 PROPOSED must equal the amounts entered in the ACCOUNT CATEGORIES on the NonCityBudget and program budget worksheets. The "ERROR" message appears until the sum of the line items equals the amount of the subtotals that have aggregated from your NonCityBudget and program budget worksheets.

Account Description	2011 ACTUAL	2012 BUDGET	2013-14 PROPOSED
A. PERSONNEL			
Salary	606,798	592,758	676,307
Taxes	62,735	51,223	56,465
Benefits	125,418	128,260	151,622
SUBTOTAL A.	794,951	772,241	884,394
B. OPERATING			
All "Operating" Costs	391,819	334,005	336,455
SUBTOTAL B.	391,819	334,005	336,455
C. SPACE			
Rent/Utilities/Maintenance	271,323	294,739	294,189
Mortgage (P&I) / Depreciation / Taxes	229,358	185,757	185,757
SUBTOTAL C.	500,681	480,496	479,946
D. SPECIAL COSTS			
Assistance to Individuals	4,657	7,500	5,000
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	545,744	496,515	797,897
Other:	0	0	0
SUBTOTAL D.	550,401	504,015	802,897
SPECIAL COSTS LESS CAPITAL EXPENDITURE	4,657	7,500	5,000
TOTAL OPERATING EXPENSES	1,692,108	1,594,242	1,705,795
E. TOTAL CAPITAL EXPENDITURES	545,744	496,515	797,897

7. PERSONNEL DATA: List Percent of Staff Turnover

6.3%

Divide the number of resignations or terminations in calendar year 2011 by total number of budgeted positions.

Do not include seasonal positions. Explain if you had a 20% or more turnover rate in a certain staff position/category.

Discuss any other noteworthy staff retention issues, or policies to reduce staff turnover.

n/a

8. PERSONNEL DATA: Personnel Schedule

a. Personnel Schedule

List each staff position by title. Seasonal Employees should be entered in seasonal section. Indicate if the position meets the Living Wage Exception with an asterisk (*).

Indicate the number of 2013 Proposed Full-Time Equivalents (FTEs) in each staff position, across all agency programs.

Indicate the total salaries for all FTEs in that staff position. **Do NOT include payroll taxes or benefits in this table.**

Indicate base hourly wage for each position. **All positions in city funded programs must meet City Living Wage requirements.**

The Madison Living Wage for 2013 will be **\$12.19 (hourly)**.

Staff Position/Category	2012		2013-14		Hourly Wage	2013-14 PROPOSED FTEs DISTRIBUTED BY PROGRAM									
	Est. FTE	Est. Salary	Proposed FTE	Proposed Salary		A	B	C	D	E	F	G	H	Non-City FTE	
						FTE	FTE	FTE	FTE	FTE	FTE	FTE	FTE		FTE
Executive Director	0.75	44,318	0.75	45,568	29.10	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.62
Financial Manager	0.80	44,449	0.80	45,783	27.41	0.20	0.16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.44
Youth Programs Director	1.00	44,402	1.00	49,207	23.57	0.48	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.52
Youth Programs staff	3.50	120,520	3.50	122,912	16.75	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.50
Housing Developer	1.00	56,581	1.00	88,171	27.86	0.00	0.75	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.25
Rehab Specialist	0.75	38,442	0.88	46,168	25.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.88
Maintenance staff	0.88	36,699	0.75	29,034	20.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.75
Office Manager	0.75	29,597	0.75	31,060	19.83	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.75
Land Trust Manager	0.75	36,143	0.75	32,228	23.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.75
Housing Manager	1.00	53,010	1.00	54,600	26.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
Housing Marketer	0.80	33,408	1.00	43,013	20.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
Business Incubator Manager	1.00	54,012	1.00	55,603	26.63	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
Community Organizer	0.50	20,880	1.00	41,760	20.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
Americorps*	2.00	24,180	2.00	24,180	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	15.48	636,641	16.18	709,287		3.81	0.91	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11.46
	TOTAL PERSONNEL COSTS:			712,657											

b. Seasonal Employees

Seasonal/Project Employee ONLY	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings	A	B	C	D	E	F	G	H	Non-City
					# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS
Groundskeeper	30	180	18.72	3,370	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	30	180		3,370	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00

**STAFF REVIEW OF PROPOSALS FOR
2013 – 2014 Funding Process**

-
1. **Project Name/Title:** Program A. Rental Housing
2. **Agency Name:** Housing Initiatives
3. **Requested Amount:** 2013: \$432,000 (Prior Year Level: \$0)
2014: \$432,000 (2012 Reserves: \$139,100)
4. **Project Type:** New or Continuing

5. **Framework Plan Objective Most Directly Addressed by Proposed Activity:**
D. Housing – Rental housing

6. **Product/Service Description:**

Housing Initiatives (HI) proposes to acquire and rehabilitate 16 units of affordable rental housing for low-income people who have chronic mental illness and are homeless. HI provides property management for the 79 units that they currently own and operate; secures rent subsidies for their clients (Shelter + Care, Section 8 or Veterans Assistance (VASH) Vouchers) to make the units affordable; and ensures that their clients receive case management services.

7. **Anticipated Accomplishments (Numbers/Type/Outcome):**

Funds will be used to develop 8 units of affordable rental housing in 2013 and 8 units of affordable rental housing in 2014 for a total of 16 units targeted for lower income individuals.

8. **Staff Review**

The proposal is for a “license to hunt” meaning that sites have not yet been identified. The proposed budget is based on 16 years of experience developing housing. Projected cash flow appears high for this size development. However, an actual project pro-forma and related details will need to be submitted, evaluated and approved when the sites are known. HI proposes to leverage a low-interest 2% 30-year WHEDA loan of approximately \$200,000 to complete each 8-unit project. The actual funding subsidy may vary depending on size of units and purchase price.

In terms of project demand, HI application’s states that there are 100 people on the waiting list. The application has limited information about affirmative marketing strategies and their tenant selection plan, although the CDBG office approves these annually with the most recent being May 2012. Rental vacancy rates in Madison have been steadily dropping over the past five years to a historic low of 2% demonstrating pent up demand for rental units.

HI works closely with their clients’ mental health case managers to maintain tenant stability. HI has established numerous relationships with agencies who work with their residents. By working with these agencies HI can deal with issues that arise. HI’s proposal references coordination with Dane County Mental Health providers and the Veteran’s Administration, though not at length. HI uses a handful of volunteers for transportation and property upkeep.

HI has a 16 year successful history of developing affordable housing for this high-risk, high-needs population of homeless people with mental illness. HI has been adding between 4-8 units per year to its portfolio, and therefore should be able to meet these objectives in the proposed timeline. The application has limited details about HI staff’s qualifications and development experience, market conditions, project timeline, and financial capacity of the agency. In a phone conversation, HI’s Executive Director clarified the following:

- 1) Qualifications & Development Experience: The Executive Director has developed 18 affordable rental housing projects including one major new construction project. The Development Director has 35 years experience having retired from WHEDA in the multi-family, non-profit rental underwriting department.
- 2) Market Conditions: There have been several real estate listings per month of 4-plexes in the \$180,000-\$240,000 price range demonstrating adequate supply. HI prefers to focus on foreclosed, vacant properties ideally on the westside so as to provide diversity in housing opportunities for their clientele. Very few properties are entirely vacant which limits availability, but a few opportunities do arise. HI states they have become more involved in community stabilization efforts and seek properties where this is necessary. The application mentions seeking condominium units, however, identified project sites

will have to be consistent with the 2013-2014 Framework condition to not convert owner-occupied units to rental units.

- 3) Timeline: 2013 & 2014: Site identification- April; Closing- August, Rehab- September, Rent-up- October.

HI is a Community Housing Development Organization (CHDO) and qualifies for HOME CHDO set aside funds.

This proposal does not identify a specific site(s) but rather requests funds to allow the agency to seek a site(s). Proposed new HUD rules state that funds may not be committed unless a specific local project with an address has been reviewed and approved based on detailed project information. If funding is recommended, this project may only be approved contingent upon having identified a specific site(s) by a certain date and providing related project detail sufficient for staff to ensure a viable project and compliance with regulatory requirements.

HUD has proposed a slate of significant changes to the HOME regulations. These changes have been put forth for comment and at this time the final version is not decided. It is HUD's intent to have these rules finalized by the end of this year. If this project is funded it will have to comply with all future adopted regulatory changes.

Total Cost/Total Beneficiaries Equals:	\$632,406/8 rental housing units= \$79,051/unit
CD Office Funds/CD-Eligible Beneficiaries Equals:	\$432,000/8 rental housing units= \$54,000/unit
CD Office Funds as Percentage of Total Budget:	69%

ORGANIZATION:	Housing Initiatives, Inc.
PROGRAM/LETTER:	D Program D
OBJECTIVE STATEMENTS:	CDBG: D. Housing - Rental housing (CDBG)

DESCRIPTION OF PROJECT

1. NEED FOR PROJECT: Please identify local community need, including gap you are addressing, and assessment of market conditions of the neighborhood, the response of the neighborhood and the alderperson of the proposed project.

There is a documented need for permanent housing for persons who are disabled through chronic mental illness and are homeless. Housing Initiatives, Inc. (HII) has over 100 persons on our waiting list for such housing.

2. PROJECT DESCRIPTION: Please provide an overview of the project, including whether project is acquisition, rehab and/or new construction, type, size of unit created, and the impact of your project.

HII would like to develop eight units of permanent housing for persons who are disabled through chronic mental illness and are homeless. We would look to do these, ideally, through acquisition/rehab of two four plex apartment buildings, but would also look for duplexes and condominium units suitable for this population. The apartments would be one or two bedroom units of modest size.

3. PROPOSED PROJECT GOALS: Please provide the total number of units in the project, the number of affordable units created and the number of units assisted with requested funds, the number of unduplicated households served by the assisted units.

We would provide eight affordable units with rent assistance from HUD Shelter plus care, none of which would be duplicated.

4. SERVICES INCLUDED IN PROPOSED PROJECT: Please describe any services (such as housing counseling or case management), provided to the residents in this project, including those that are disability related.

If services are ongoing, please describe the content and frequency.

The tenants receive permanent housing through the funds provided and case management through Continuum of care matching services as part of Shelter Plus Care.

ORGANIZATION:

Housing Initiatives, Inc.

PROGRAM/LETTER:

D Program D

5. LOCATION: Please identify the specific site or target neighborhood(s).

The target area is the City of Madison in areas of greatest need with alder support.

6. POPULATION SERVED: Please describe the target population in terms of preferences to a specific population (e.g., families, individuals with a disability, homeless) or any other unique characteristic.

Persons disabled through chronic mental illness and are homeless.

7. OUTREACH PLAN: Please briefly describe your affirmative marketing strategy, tenant selection plan and any other strategies to engage your intended population.

Our marketing is done through existing waiting list persons and those referred through Dane county mental health service providers and the Veterans administration.

8. COORDINATION: Please describe how you coordinate your project with other community groups or agencies.

Coordination with Dane county Mental health providers is done on a day to day basis based on existing relations with such service providers.

9. VOLUNTEERS: Please describe how volunteers will be utilized in your project.

Volunteer services for project upkeep and transportation services are used

10. Number volunteers utilized in 2011?

5

Number of volunteer hours utilized in 2011?

100

ORGANIZATION:	Housing Initiatives, Inc.
PROGRAM/LETTER:	D Program D

11. BARRIERS: Are there populations that are experiencing barriers to the housing you are proposing, e.g., access to transportation, physical or mental impairments or disabilities?

The barriers for this population are landlords who do not want to rent to persons with limited or no income, behavior problems, poor landlord references and (sometimes) police records caused by conditions and behaviors associated with chronic mental illness are common

12. EXPERIENCE: Please describe your agency's affordable housing development experience, qualifications of proposed project staff, financial capacity of your agency to complete your proposed project, and past performance that will contribute to the success of the proposed program. How many affordable housing units has your agency created and managed in the past five years?

Hll has provided affordable housing for this population for 16 years. The staff has a combined experience of over 65 years, including the executive director who has led Hll for 15 years. Hll has an annual audit in compliance with federal requirements and over 16 years has provided 84 units of housing with a variety of funding from the City State and Federal sources, with no failures.

13. RISK: Please describe the level of risk your agency will be taking with this project. Please describe any fees you will be charging to the participant.

The only risk to the project is if Federal funding for HUD Shelter plus Care is eliminated. The only fees charged tenants is 30% of Income for rent.

14. STAFF: Project Staff: Staff Titles, FTE dedicated to this project and required qualifications for project staff.

Staff Title	FTE	Credentials/Qualifications
Executive Director	X	15 years experience
Deputy Director	X	5 years experience
Development Director	X	35 Years experience
Property/Client Services	X	23 years experience
Office Manager		4 years experience
Maintenance Supervisor	X	20 years experience

ORGANIZATION:	Housing Initiatives, Inc.
PROGRAM/LETTER:	D Program D

DEMOGRAPHICS

Complete the following chart for unduplicated participants served by your agency's rental program in 2011. Indicate the number and percentage by the following characteristics. For new projects, please identify projected participant numbers and descriptors.

DESCRIPTOR	Part. #	Part. %	Staff #	Staff %	DESCRIPTOR	Part. #	Part. %	Staff #	Staff %
TOTAL	143	100%	0	0%	RESIDENCY				
MALE	86	60%	0	0%	CITY OF MADISON	131	92%		
FEMALE	57	40%	0	0%	DANE COUNTY (NOT IN CITY)	12	8%		
UNKNOWN/OTHER	0	0%	0	0%	OUTSIDE DANE COUNTY	0	0%		
					TOTAL RESIDENCY	143	100%		
					AGE				
					<2	0	0%		
					2 - 5	0	0%		
					6 - 12	0	0%		
					13 - 17	0	0%		
					18 - 29	11	8%		
					30 - 59	108	76%		
					60 - 74	22	15%		
					75 & UP	2	1%		
					TOTAL AGE	143	100%		
					RACE				
					WHITE/CAUCASIAN	84	59%	0	0%
					BLACK/AFRICAN AMERICAN	48	34%	0	0%
					ASIAN	10	7%	0	0%
					AMERICAN INDIAN/ALASKAN NATIVE	0	0%	0	0%
					NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%
					MULTI-RACIAL:	0	0%	0	0%
					Black/AA & White/Caucasian	0	0%	0	0%
					Asian & White/Caucasian	0	0%	0	0%
					Am Indian/Alaskan Native & White/Caucasian	0	0%	0	0%
					Am Indian/Alaskan Native & Black/AA	0	0%	0	0%
					BALANCE/OTHER	1	1%	0	0%
					TOTAL RACE	143	100%	0	0%
					ETHNICITY				
					HISPANIC OR LATINO	3	2%	0	0%
					NOT HISPANIC OR LATINO	140	98%	0	0%
					TOTAL ETHNICITY	143	100%	0	0%
					PERSONS WITH DISABILITIES	143	100%	0	0%

Part. = Participant

Note: Race and ethnic categories are stated as defined in HUD standards

ORGANIZATION:	Housing Initiatives, Inc.
PROGRAM/LETTER:	D Program D

PROJECT OUTCOMES

Number of unduplicated individual participants served during 2011.	143
Total to be served in 2013.	

Complete the following for each project outcome. No more than two outcomes per project will be reviewed.
 Refer to the instructions for detailed descriptions of what should be included in the table below.

Outcome Objective # 1:	Provide Permanent Housing for 8 persons disabled through chronic mental illness and/or are homeless.
Performance Indicator(s):	Show occupancy of 8 persons in the proposed project

Proposed for 2013:	Total to be considered in <input type="text" value="8"/> perf. measurement	Targeted % to meet perf. measures <input type="text" value="100%"/>	Targeted # to meet perf. measure <input type="text" value="8"/>
Proposed for 2014:	Total to be considered in <input type="text" value="8"/> perf. measurement	Targeted % to meet perf. measures <input type="text" value="100%"/>	Targeted # to meet perf. measure <input type="text" value="8"/>

Explain the measurement tools or methods:	Measurement will be project occupancy status as demonstrated by tenant files for the project.
---	---

Outcome Objective # 2:	
Performance Indicator(s):	

Proposed for 2013:	Total to be considered in <input type="text"/> perf. measurement	Targeted % to meet perf. measures <input type="text" value="0%"/>	Targeted # to meet perf. measure <input type="text" value="0"/>
Proposed for 2014:	Total to be considered in <input type="text"/> perf. measurement	Targeted % to meet perf. measures <input type="text" value="0%"/>	Targeted # to meet perf. measure <input type="text" value="0"/>

Explain the measurement tools or methods:	
---	--

ORGANIZATION: Housing Initiatives, Inc.

1. Provide the following information for rental housing projects (list each address with unit number separately).

Address/Unit Number	# Bedrooms	Req. Amount of CD \$	Proj. Income Category*	Proj. Monthly Unit Rent	Includes Utilities?
Unspecified		\$720,000	<30%	\$720	Yes

*Less than or equal to 30% CMI, 31-50% CMI, 51-60% CMI, 61-80% CMI, >80% CMI

2. Identify if your project includes any of the following features (Check all that apply):

Incorporates accessibility features

Incorporates energy efficiency features

Involves lead paint removal

Involves asbestos removal

Incorporates long term affordability restrictions greater than that required by the HOME rules

X
X

3. For projects that include rehabilitation, have you completed a capital needs plan for this property? Describe.

Project is unspecified, when located we will do a capital need plan.

4. Do you qualify as a Community Housing Development Organization (CHDO)?

Yes

5. MATCH: Please describe if you could provide non-federal matching funds for this project. If yes, describe amount and source of matching funds.

Private financing and Grants

6. FUNDS NEEDED: Please describe why CDD funds are needed and how you can ensure the project will be viable.

CDD funds are needed to provide equity capital to obtain complimentary loans to complete development costs.

ORGANIZATION: Housing Initiatives, Inc.

7. Real Estate Project Data Summary

Enter the site address (or addresses) for the proposed project and answer the identified questions by column for each address site.

	# of Units Prior to Purchase	# of Units Post- Project	# Units Occupied	# Tenants to be Displaced	Appraised Value Current	Appraised Value Post-Project	Purchase Price	Accessible Current?	Post-Project Accessible?
Address:	Unspecified								
	84	92	84	0					
Address:									
Address:									
Address:									
Address:									

If no specific site has been identified, use the average of the high-low range or your best estimate of costs.

ORGANIZATION: Housing Initiatives, Inc.

8. CAPITAL BUDGET

Enter the proposed project capital budget. Identify the fund source and terms and whether the funds have been already committed or are proposed. **Place a C next to source if funds have already been committed and a P next to source if the fund source is proposed.** Ex.: Acquisition: \$300,000 HOME (P), \$100,000 from CDBG (P), \$200,000 from Anchor Bank @5% interest/15 years (C).

	TOTAL	Amount	Source/Terms**	Amount	Source/Terms**
Acquisition Costs:					
Acquisition	450,000	432,000	CDBG (p)	18,000	WHEDA @2% 30 year (p)
Title Insurance and Recording	800			800	WHEDA @2% 30 year (p)
Appraisal	1,600	0		1,600	WHEDA @2% 30 year (p)
Predvlpmnt/feasibility/market study*	0	0		0	
Survey	1,500	0		1,500	WHEDA @2% 30 year (p)
Marketing*	0	0		0	
Relocation	0	0		0	
Other (List)					
	0	0		0	
Construction:					
Construction Costs	90,000	0		90,000	WHEDA @2% 30 year (p)
Soils/Site Preparation	0	0		0	
Construction Mgmt	0	0		0	
Landscaping, Play Lots, Signage	0	0		0	
Construction Interest	0	0		0	
Permits; Print Plans/Specs	1,500	0		1,500	WHEDA @2% 30 year (p)
Other (List)					
Environmental & Taxes	10,850	0		10,850	WHEDA @2% 30 year (p)
Fees:					
Architect	0	0		0	
Engineering	0	0		0	
Accounting*	2,000	0		2,000	WHEDA @2% 30 year (p)
Legal*	5,000	0		5,000	WHEDA @2% 30 year (p)
Development Fee*	63,000	0		63,000	WHEDA @2% 30 year (p)
Leasing Fee*	0	0		0	
Other (List)					
Loan App & Origination	3,256	0		3,256	WHEDA @2% 30 year (p)
Project Contingency:					
	0	0		0	
Furnishings:					
	0	0		0	
Reserves Funded from Capital:					
Operating Reserve	0	0		0	
Replacement Reserve	2,400	0		2,400	WHEDA @2% 30 year (p)
Maintenance Reserve	0	0		0	
Vacancy Reserve	0	0		0	
Lease Up Reserve	0	0		0	
Other: (List)					
Closing Costs	500	0		500	WHEDA @2% 30 year (p)
TOTAL COSTS:	632,406	432,000		200,406	

If CDBG funds are used for items with an asterisk (), the total cost of these items may not exceed 15% of the CDBG amount.

**Note: Each amount for each source must be listed separately, i.e., Acquisition: \$30,000 HOME, \$125,000 Capitol Revolving Fund. Identify if grant or loan and terms.

s, Inc.

for the proposed project for a 15 year period.

Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9
72,960	73,690	74,426	75,171	75,922	76,682	77,449	78,223	79,005
1,459	1,474	1,488	1,503	1,518	1,533	1,549	1,564	1,580
0	0	0	0	0	0	0	0	0
71,501	72,216	72,938	73,668	74,404	75,148	75,900	76,659	77,425

300	306	312	318	325	331	338	345	351
0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0
7,000	7,140	7,283	7,428	7,577	7,729	7,883	8,041	8,202
4,500	4,590	4,682	4,775	4,871	4,968	5,068	5,169	5,272
14,400	14,688	14,982	15,281	15,587	15,899	16,217	16,541	16,872
13,000	13,260	13,525	13,796	14,072	14,353	14,640	14,933	15,232
4,290	4,376	4,463	4,553	4,644	4,737	4,831	4,928	5,026
0	0	0	0	0	0	0	0	0
3,000	3,060	3,121	3,184	3,247	3,312	3,378	3,446	3,515
0	0	0	0	0	0	0	0	0

2,300	2,346	2,393	2,441	2,490	2,539	2,590	2,642	2,695
0	0	0	0	0	0	0	0	0
48,790	49,766	50,761	51,776	52,812	53,868	54,945	56,044	57,165
22,711	22,450	22,177	21,891	21,592	21,280	20,954	20,614	20,260

10,139	10,139	10,139	10,139	10,139	10,139	10,139	10,139	10,139
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
10,139	10,139	10,139	10,139	10,139	10,139	10,139	10,139	10,139
58,929	59,905	60,900	61,915	62,951	64,007	65,084	66,183	67,304
12,572	12,311	12,038	11,752	11,453	11,141	10,815	10,475	10,121
12,572	12,311	12,038	11,752	11,453	11,141	10,815	10,475	10,121

as, storage spaces or application fees.

2.0%
1.0%

Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
79,795	80,593	81,399	82,213	83,035	83,866
1,596	1,612	1,628	1,644	1,660	1,677
0	0	0	0	0	0
78,200	78,982	79,771	80,569	81,375	82,189

359	366	373	380	388	396
0	0	0	0	0	0
0	0	0	0	0	0
8,366	8,533	8,704	8,878	9,055	9,236
5,378	5,485	5,595	5,707	5,821	5,938
17,209	17,554	17,905	18,263	18,628	19,000
15,536	15,847	16,164	16,487	16,817	17,153
5,127	5,229	5,334	5,441	5,550	5,661
0	0	0	0	0	0
3,585	3,657	3,730	3,805	3,881	3,958
0	0	0	0	0	0

2,749	2,804	2,860	2,917	2,975	3,035
0	0	0	0	0	0
58,309	59,475	60,664	61,878	63,115	64,377
19,891	19,507	19,107	18,692	18,260	17,811

10,139	10,139	10,139	10,139	10,139	10,139
0	0	0	0	0	0

0	0	0	0	0	0
0	0	0	0	0	0
10,139	10,139	10,139	10,139	10,139	10,139
68,448	69,614	70,803	72,017	73,254	74,516
9,752	9,368	8,968	8,553	8,121	7,672
9,752	9,368	8,968	8,553	8,121	7,672

ORGANIZATION:	Housing Initiatives, Inc.
PROGRAM/LETTER:	A Program A

10. PROGRAM BUDGET

a. 2012 BUDGETED

REVENUE SOURCE	SOURCE TOTAL	ACCOUNT CATEGORY			
		PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	10,800	5,500	5,300	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER	790,090	233,890	556,200	0	0
TOTAL REVENUE	800,890	239,390	561,500	0	0

b. 2013 PROPOSED BUDGET

REVENUE SOURCE	SOURCE TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	60,300	55,000	5,300	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	432,000	0	0	0	432,000
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	808,940	233,940	575,000	0	0
TOTAL REVENUE	1,301,240	288,940	580,300	0	432,000

*OTHER GOVT 2013

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2013

Source	Amount	Terms
Rent Income	808,940	
	0	
	0	
	0	
	0	
TOTAL	808,940	

ORGANIZATION:	Housing Initiatives, Inc.
PROGRAM/LETTER:	A Program A

11. 2014 PROGRAM CHANGE EXPLANATION

Complete only if you are requesting more than your 2013 request.

Note: Additional funding should only be requested where services or programming will change or expand in the second year.

a. PROGRAM UPDATE: If requesting more than 2013, describe any major changes being proposed for the program/service in 2014, i.e., expansions or narrowing in target population, scope and level of services, geographic area to be served, etc.).

200 characters (w ith spaces) (2 lines max.)

b. 2014 COST EXPLANATION

Complete only if significant financial changes are anticipated between 2013-2014.

Explain specifically, by revenue source, any significant financial changes that you anticipate between 2013 and 2014.

For example: unusual cost increases, program expansion or loss of revenue.

200 characters (w ith spaces) (2 lines max.)

c. 2014 PROPOSED BUDGET		ACCOUNT CATEGORY			
REVENUE SOURCE	BUDGET TOTAL	PERSONNEL	OPERATING	SPACE	SPECIAL COSTS
DANE CO HUMAN SVCS	60,300	55,000	5,300	0	0
DANE CO CDBG	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0
MADISON-CDBG	432,000	0	0		432,000
UNITED WAY ALLOC	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0
OTHER GOVT*	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0
USER FEES	0	0	0	0	0
OTHER**	808,940	233,940	575,000	0	0
TOTAL REVENUE	1,301,240	288,940	580,300	0	432,000

*OTHER GOVT 2014

Source	Amount	Terms
	0	
	0	
	0	
	0	
	0	
TOTAL	0	

**OTHER 2014

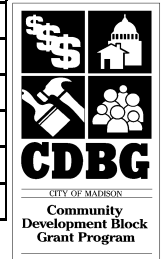
Source	Amount	Terms
Rent Income	808,940	
	0	
	0	
	0	
	0	
TOTAL	808,940	

APPLICATION FOR 2013-2014 FUNDS



1. AGENCY CONTACT INFORMATION

Organization	Housing Initiatives, Inc.	
Mailing Address		
Telephone		
FAX		
Admin Contact		
Financial Contact		
Website		
Email Address		
Legal Status	Select Status from Drop-Down	
Federal EIN:		
State CN:		
DUNS #		



2. SIGNATURE PAGE

AFFIRMATIVE ACTION

If funded, applicant hereby agrees to comply with 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 www.cityofmadison.com/dcr/aaForms.cfm.

LIVING WAGE ORDINANCE

If funded, applicant hereby agrees to comply with City of Madison Ordinance 4.20. The Madison Living Wage for 2013 will be **\$12.19 (hourly)**. This reflects a 3% increase over Madison Living Wage for 2012, and is consistent with prior annual increases.

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.

3. SIGNATURE

Enter name:

By entering your initials in the box you are electronically signing your name and agreeing to the terms listed above

DATE

AGENCY CONTACT INFORMATION

ORGANIZATION **Housing Initiatives, Inc.**

1. AGENCY CONTACT INFORMATION

A	Program A	Select an Objective Statement from the Drop-Down			
	Contact: Dean Loumos	New Prg? Yes	Phone: 608 277 8330	Email: dloumos@housinginit.org	
B	Program B	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	
C	Program C	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	
D	Program D	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	
E	Program E	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	
F	Program F	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	
G	Program G	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	
H	Program H	Select an Objective Statement from the Drop-Down			
	Contact:	New Prg?	Phone:	Email:	

2. AGENCY REVENUE DETAILED BY PROGRAM

REVENUE SOURCE	2011 ACTUAL	2012 BUDGET	2013-14 PROPOSED	2013-14 PROPOSED PROGRAMS									
				A	B	C	D	E	F	G	H	Non-City	
DANE CO HUMAN SVCS	713,439	10,800	60,300	60,300	0	0	0	0	0	0	0	0	0
DANE CO CDBG	0	0	0	0	0	0	0	0	0	0	0	0	0
MADISON-COMM SVCS	0	0	0	0	0	0	0	0	0	0	0	0	0
MADISON-CDBG	0	0	432,000	432,000	0	0	0	0	0	0	0	0	0
UNITED WAY ALLOC	0	0	0	0	0	0	0	0	0	0	0	0	0
UNITED WAY DESIG	0	0	0	0	0	0	0	0	0	0	0	0	0
OTHER GOVT	0	0	0	0	0	0	0	0	0	0	0	0	0
FUNDRAISING DONATIONS	0	0	0	0	0	0	0	0	0	0	0	0	0
USER FEES	674,250	0	0	0	0	0	0	0	0	0	0	0	0
OTHER	0	790,090	808,940	808,940	0	0	0	0	0	0	0	0	0
TOTAL REVENUE	1,387,689	800,890	1,301,240	1,301,240	0	0	0	0	0	0	0	0	0

3. AGENCY ORGANIZATIONAL PROFILE

a. AGENCY MISSION STATEMENT

600 characters (with spaces) (6 lines max.) Housing Initiatives exists to provide permanent housing to people who suffer from chronic mental illness and became homeless because of it.

b. AGENCY EXPERIENCE AND QUALIFICATIONS

6000 characters (with spaces) (47 lines max.) Housing Initiatives was established in 1993 and has since developed, own and manage 80 units of housing for people with mental illnesses. We also rent another 50 units from private landlords. All of our units are subsidized through Shelter plus Care rent assistance program that is funded by HUD through Dane County Human Services or subsidized through the Section 8 program. Last year our program was awarded a prestigious honor from HUD for providing permanent housing specifically in our office/apartment complex and we will continue to add units to our stock. Our staff has had little turnover since its inception and our Executive Director, who is largely responsible for building our program, has been working here for 17 years.

4. AGENCY GOVERNING BODY

How many Board meetings were held in 2011?

How many Board meetings has your governing body or Board of Directors scheduled for 2012?

How many Board seats are indicated in your agency by-laws?

Please list your current Board of Directors or your agency's governing body.

Name	Robert L. Beilman, President				
Home Address	4510 Woods End Rd				
Occupation	Dean Medical Center (retired)				
Representing	Professional				
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	Sandra Drew, V-President-Secretary				
Home Address	10 Bayberry Tr				
Occupation	Professional, retired				
Representing					
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	George Silverwood				
Home Address	4414 Woods End Rd				
Occupation	Bunberry realtor				
Representing	Professional				
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	Kathryn Michol, MD, MS				
Home Address	125 N. Hamilton St. #705				
Occupation	Retired Physician				
Representing	Professional				
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	Tim Olsen				
Home Address	4114 Scott Tr				
Occupation	Program Supervisor, Tellurian				
Representing	Professional				
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	Mark Adams				
Home Address	1313 Crowley Ave # 1				
Occupation	Client representative				
Representing	Program				
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	Julie Stephens				
Home Address	1012 E. Dayton St. #3				
Occupation	Client representative				
Representing	Program				
Term of Office	3 years	From:	01/2011	To:	01/2014
Name	Nhahn Khampouny				
Home Address	1110 Ruskin St. # 6				
Occupation	Client representative				
Representing	Program				
Term of Office	3 years	From:	01/2011	To:	01/2014

AGENCY GOVERNING BODY cont.

Name	Randy Blumer, Treasurer			
Home Address	2573 Curly Oaks			
Occupation	Director, Insurance Security Fund			
Representing	Professional			
Term of Office	3 years	From:	01/2011	To: 01/2014
Name	Ed Gleason			
Home Address	714 Huron Hill			
Occupation	Alliant Energy Executive (Retired)			
Representing	Community			
Term of Office	3 years	From:	01/2011	To: 01/2014
Name	Terry Hottenroth			
Home Address	4321 Westport Rd			
Occupation	Lawyer, UW Health			
Representing	Community			
Term of Office	3 years	From:	01/2011	To: 01/2014
Name				
Home Address				
Occupation				
Representing				
Term of Office	3 years	From:	01/2011	To: 01/2014
Name				
Home Address				
Occupation				
Representing				
Term of Office	3 years	From:	01/2011	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy
Name				
Home Address				
Occupation				
Representing				
Term of Office		From:	mm/yyyy	To: mm/yyyy

AGENCY GOVERNING BODY cont.

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

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Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

Name

Home Address

Occupation

Representing

Term of Office

From: mm/yyyy

To: mm/yyyy

5. STAFF-BOARD-VOLUNTEER DEMOGRAPHICS

Indicate by number the following characteristics for your agency's current staff, board and volunteers.

Refer to application instructions for definitions. You will receive an "ERROR" until completing the demographic information.

DESCRIPTOR	STAFF		BOARD		VOLUNTEER	
	Number	Percent	Number	Percent	Number	Percent
TOTAL	7	100%	11	100%	0	0%
GENDER						
MALE	6	86%	7	64%	0	0%
FEMALE	1	14%	4	36%	0	0%
UNKNOWN/OTHER	0	0%	0	0%	0	0%
TOTAL GENDER	7	100%	11	100%	0	0%
AGE						
LESS THAN 18 YRS	0	0%	0	0%	0	0%
18-59 YRS	6	86%	7	64%	0	0%
60 AND OLDER	1	14%	4	36%	0	0%
TOTAL AGE	7	100%	11	100%	0	0%
RACE*						0
WHITE/CAUCASIAN	6	86%	9	82%	0	0%
BLACK/AFRICAN AMERICAN	0	0%	1	9%	0	0%
ASIAN	0	0%	1	9%	0	0%
AMERICAN INDIAN/ALASKAN NATIVE	1	14%	0	0%	0	0%
NATIVE HAWAIIAN/OTHER PACIFIC ISLANDER	0	0%	0	0%	0	0%
MULTI-RACIAL:	0	0%	0	0%	0	0%
Black/AA & White/Caucasian	0	0%	0	0%	0	0%
Asian & White/Caucasian	0	0%	0	0%	0	0%
Am Indian/Alaskan Native & White/Caucasian	0	0%	0	0%	0	0%
Am Indian/Alaskan Native & Black/AA	0	0%	0	0%	0	0%
BALANCE/OTHER	0	0%	0	0%	0	0%
TOTAL RACE	7	100%	11	100%	0	0%
ETHNICITY						
HISPANIC OR LATINO	1	14%	0	0%	0	0%
NOT HISPANIC OR LATINO	6	86%	11	100%	0	0%
TOTAL ETHNICITY	7	100%	11	100%	0	0%
PERSONS WITH DISABILITIES	0	0%	3	27%	0	0%

*These categories are identified in HUD standards.

6. AGENCY EXPENSE BUDGET

This chart describes your agency's total expense budget for 3 separate years.

Where possible, use audited figures for 2011 Actual.

The subtotals for the 2012 BUDGET and 2013-14 PROPOSED must equal the amounts entered in the ACCOUNT CATEGORIES on the NonCityBudget and program budget worksheets. The "ERROR" message appears until the sum of the line items equals the amount of the subtotals that have aggregated from your NonCityBudget and program budget worksheets.

Account Description	2011 ACTUAL	2012 BUDGET	2013-14 PROPOSED
A. PERSONNEL			
Salary		200,000	225,000
Taxes		39,390	63,940
Benefits		0	0
SUBTOTAL A.	0	239,390	288,940
B. OPERATING			
All "Operating" Costs		561,500	580,300
SUBTOTAL B.	0	561,500	580,300
C. SPACE			
Rent/Utilities/Maintenance	0	0	0
Mortgage (P&I) / Depreciation / Taxes	0	0	
SUBTOTAL C.	0	0	0
D. SPECIAL COSTS			
Assistance to Individuals	0	0	0
Subcontracts, etc.	0	0	0
Affiliation Dues	0	0	0
Capital Expenditure	0	0	432,000
Other:	0	0	0
SUBTOTAL D.	0	0	432,000
SPECIAL COSTS LESS CAPITAL EXPENDITURE	0	0	0
TOTAL OPERATING EXPENSES	0	800,890	869,240
E. TOTAL CAPITAL EXPENDITURES	0	0	432,000

7. PERSONNEL DATA: List Percent of Staff Turnover

0.0%

Divide the number of resignations or terminations in calendar year 2011 by total number of budgeted positions.

Do not include seasonal positions. Explain if you had a 20% or more turnover rate in a certain staff position/category.

Discuss any other noteworthy staff retention issues, or policies to reduce staff turnover.

600 characters (with spaces) (6 lines max.)

b. Seasonal Employees

Seasonal/Project Employee ONLY	Nbr of Weeks	Total Hours	Hourly Wage	Seasonal Earnings	A	B	C	D	E	F	G	H	Non-City
					# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS	# HRS
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	0	0	0.00	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	0	0		0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00