

Affordable Housing Fund (AHF-TC) Application

This application form should be used for projects seeking City of Madison AHF-TC funds. Please format for logical page breaks. Applications must be submitted electronically to the City of Madison Community Development Division by **noon on July 18, 2022**. Email to: cddapplications@cityofmadison.com

APPLICANT INFORMATION

Proposal Title:	Movin' Out Housing Initiatives Scattered Sites		
Amount of Funds Requested:	\$2,960,000	Type of Project:	<input checked="" type="checkbox"/> New Construction <input checked="" type="checkbox"/> Acquisition/Rehab
Name of Applicant:	Megan Schuetz		
Mailing Address:	902 Royster Oaks Drive Ste 105, Madison, WI, 53714		
Telephone:	608-229-6910	Fax:	608-819-0623
Admin Contact:	Megan Schuetz	Email Address:	megan@movin-out.org
Project Contact:	Megan Schuetz	Email Address:	megan@movin-out.org
Financial Contact:	Megan Schuetz	Email Address:	megan@movin-out.org
Website:	movin-out.org		
Legal Status of Maj. Owner:	<input type="checkbox"/> For-profit <input checked="" type="checkbox"/> Non-profit	LIHTC Application:	<input checked="" type="checkbox"/> 4% only <input type="checkbox"/> 4+4% <input type="checkbox"/> 9%
Anticipated WHEDA Set-Aside:	<input type="checkbox"/> General <input type="checkbox"/> Preservation <input type="checkbox"/> Non-Profit <input type="checkbox"/> Supportive Housing		
Federal EIN:	39-1833482	SAM/UEI #:*	W13DBKLHL4G9
			* If seeking federal funds

AFFIRMATIVE ACTION

If funded, applicant hereby agrees to comply with the City of Madison Ordinance 39.02 and file either an exemption or an affirmative action plan with the Department of Civil Rights. A Model Affirmative Action Plan and instructions are available at <https://www.cityofmadison.com/civil-rights/contract-compliance/affirmative-action-plan/individual-developers>.

LOBBYING RESIGTRATION

Notice regarding lobbying ordinance: If you are seeking approval of a development that has over 40,000 gross square feet of non-residential space, or a residential development of over 10 dwelling units, or if you are seeking assistance from the City with a value of over \$10,000 (this includes grants, loans, TIF, or similar assistance), then you likely are subject to Madison's lobbying ordinance, sec. 2.40, MGO. **You are required to register and report your lobbying.** Please consult the City Clerk for more information. Failure to comply with the lobbying ordinance may result in fines of \$1,000 to \$5,000. You may register at <https://www.cityofmadison.com/clerk/lobbyists/lobbyist-registration>.

CITY OF MADISON CONTRACTS

If funded, applicant agrees to comply with all applicable local, state and federal provisions. A sample contract that includes standard provisions may be obtained by contacting the Community Development Division at (608) 266-6520.

If funded, the City of Madison reserves the right to negotiate the final terms of a contract with the selected agency.

SIGNATURE OF APPLICANT

Enter Name: Kathryne Auerback

By submitting this application, I affirm that the statements and representations are true to the best of my knowledge.

By entering your initials in this box **[KA]** you are electronically signing your name as the submitter of the application and agree to the terms listed above.

Date: July 8th, 2022

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

As of now the project will be able to make cashflow payments starting in Year 13. Both Movin' Out and Housing Initiatives are committed to seeing these scattered site units remain permanently affordable.

AFFORDABLE HOUSING INITIATIVE FUND GOALS & OBJECTIVES

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

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

AFFORDABLE HOUSING NEEDS

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

Movin' Out and its staff have extensive experience in identifying affordable housing needs both within the City of Madison and statewide in Wisconsin. Movin' Out has over 20 years of housing experience and over 15 years of multifamily affordable housing development experience. Dave Porterfield, Movin' Out's Senior Advisor, has over 30 years of experience in planning and developing affordable housing in Madison and Wisconsin. Dave has served on the City of Madison's Affordable Housing Strategy Committee for over 5 years. This committee is charged with identifying the City's affordable housing needs. In this capacity he is very familiar with those needs in Madison. In addition, he currently serves as Vice-Chair on the Federal Home Loan Bank of Chicago's Community Investment Advisory Council. Megan Schuetz, Movin' Out's Real Estate Developer and Real Estate Development Program Manager, has over 15 years of experience in multifamily development that includes direct experience in the Madison and the redevelopment of scattered site properties. Please also see the Development Team Experience section and the Development Experience and Capacity Tab for additional information.

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

Movin' Out currently has 1,442 individuals in Dane County on the waitlist seeking affordable housing. Movin' Out's target population includes people with disabilities and more categories of people with vulnerabilities. Housing Initiatives has a Dane County Coordinated Entry List with 741 clients on the Priority List. Of the Priority List Clients, 313 are Chronically Homeless. Of the Priority List Clients, 413 have Severe Mental Health Disabilities. 242 Clients are both Chronically Homelessness and have Mentally Health Disabilities. This is Housing Initiatives' Target Market.

INTEGRATED SUPPORTIVE HOUSING UNITS

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

All units will target households where one member has a disability. In addition, 30 units will be set aside for referrals from the County's by-name list. Housing Initiatives already utilizes this list for the units they own. In the chart below we have checked many of the boxes as they often overlap based on the referrals received. The project is open to accepting chronically homeless or homeless for 60 of the units total and, of those, there will be 30 units designated for Coordinated Entry.

9. Please describe your proposed integrated supportive housing approach that will go beyond meeting WHEDA's supportive housing requirements outlined in the Appendix S Checklist of the WHEDA Qualified Allocation Plan targeting veterans and/or persons with disabilities. Please elaborate on which target populations you plan on serving.

Movin' Out and Housing Initiatives have established Memorandums of Understanding with the following organizations: My Choice (formerly known as Care Wisconsin – for adults with physical and/or developmental disabilities and frail elderly); Dane County Department of Human Services (for children with disabilities and mental health services); and Dane County Veterans Service Office (for veterans). We are committing to partner with the Homeless Services Consortium of Dane County (HSC) to include a preference for tenant referrals from the Coordinated Entry Systems Manager (for individuals and families experiencing homelessness). We have also included an MOU directly with Housing Initiatives to evidence their commitment to homeless individuals for this project.

In addition to these relationships, Movin' Out has an established Resident Service Coordination Program that provides service coordination between the above mentioned groups, residents, and property management. Movin' Out also coordinates empowerment services available to all residents such as financial literacy, income tax preparation, and first time homebuyer education. The role of the Resident Service Coordinator is to serve as a conduit between a resident and all community connections (services, neighbors, property management) in order to ensure the long term success of the resident. Residents that Movin' Out works with directly are often long-term, successful residents that contribute to the success of the community they live in.

Because this is a joint venture between two nonprofit housing organizations with somewhat overlapping missions the resulting project will provide tenants with access to a wide range of different types of supportive services to address an array of human service needs including those that are focused on assisting people who have experienced homelessness; people with any kind of permanent disability and military veteran specific services. Additionally, Housing Initiatives and Movin' Out staff each provide a portion of the required services directly. A description of those services is described below.

Housing Initiatives already has a strong supportive services program in place with four full time positions dedicated exclusively to supportive service work with HI clients. Supportive services are offered to all clients starting at move-in, or whenever needs may arise during tenancy. Holding true to a Housing First approach, these services are offered universally and consistently, but no services are required as a prerequisite or an ongoing condition of continued housing.

A primary activity of HI staff members is to build unique support networks around each client. These support networks utilize the various public services noted above, as well as an extensive array of public and private organizations that represent various specialized services. The strength of the HI program is that the staff act as advocates for clients from the first day of move-in, building relationships and serving as architects of supportive service planning to connect clients with the most appropriate services in the community. Staff themselves also serve a critical role in directly supporting clients; they meet, train, coordinate, coach and interact with clients on a more immediate basis than most other service providers. This type of generalized support, coupled with the specialized support of other agencies, provides for a very effective approach. A sampling of supportive services/agencies might include Journey Mental Health, the Aging & Disability Resource Center, Tellurian, iCare, SOAR Case Management, primary medical care, dental care, domestic abuse intervention, food resources, educational opportunities, employment assistance and much more.

Movin' Out's approach to ensuring services are available to the tenants in its supportive housing units is similar to that of Housing Initiatives. MOI has three dedicated staff that help to connect and coordinate tenants to a wide range of supportive services including many of the same providers that work with HI tenants. The primary distinction between the two agencies is that Housing Initiatives works exclusively with homeless and mentally ill tenants and Movin' Out primarily works with people with various kinds of disabilities but who may or may not have experienced homelessness and Movin' Out does not receive funding support from the homeless system funding sources.

The project has budgeted \$1200 per unit per year to pay for supportive services. More details on services can be found in the attached Service Plan.

10. Identify the partnership(s) with supportive service agencies that have been or will be formed to serve the target population(s) for the supportive housing units, including service provider(s) from the Continuum of Care (see Attachment C), if applicable. Provide a detailed description of the type (e.g., assessment and referral, on-site intensive

case management, etc.) and level of supportive services (% FTE and ratio of staff: household) that will be provided to residents of the proposed project.

Housing Initiatives will provide referral, intake, and supportive service services for people with mental illness or experiencing homelessness.

Additional information about the supportive service approach and service partners can be found in question #9 above and the attached supportive service plan.

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

Attach a letter from the service provider(s) detailing the services they intend to provide to residents of the supportive housing units, the cost of those services and how those services will be financially supported (i.e., through the development, fundraising, existing program dollars, etc.).

Please see attached service plan. The project is allocating \$1,200 annually per unit for supportive service costs.

PROPERTY MANAGEMENT: TENANT SELECTION & AFFIRMATIVE MARKETING

12. Describe your plans to incorporate flexible tenant selection criteria for households who are connected to supportive services, in order to provide housing opportunities for persons or families who would otherwise face common obstacles obtaining housing (e.g., poor credit, negative rental history, criminal conviction records, etc.). Specifically outline how this development's tenant selection criteria is consistent with the City of Madison Tenant Selection Best Practices (Attachment B-1 of the RFP) and provides the maximum feasible flexibility in tenant selection to the general population and supportive service units.

This project will adhere to the City of Madison Tenant Selection Practices listed on Attachment B-1 of the RFP. We have attached the project's Tenant Selection Plan.

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

Movin' Out and Housing Initiatives will partner with 4 supportive services agencies that are local. We have both worked with these organizations in the past and have extensive experience with in-depth pre-lease up coordination process for people with a disability or mental illness. The organizations that will provide supportive services are My Choice (formerly known as Care Wisconsin – for adults with physical and/or developmental disabilities and frail elderly); Dane County Department of Human Services (for children with disabilities and mental health services); and Dane County Veterans Service Office (for veterans). We are committing to partner with the Homeless Services Consortium of Dane County (HSC) to include a preference for tenant referrals from the Coordinated Entry Systems Manager (for individuals and families experiencing homelessness). You will see an MOU with Housing Initiatives directly for them to continue the work they are already doing with these units as well as the additional new construction units. All of these organizations have a history of providing services to developments that are successful and well-integrated within the community.

14. Describe the proposed development's **minimum** occupancy standards (1 pp per BR) that will prevent or reduce over-housing residents in such limited affordable housing opportunities consistent with Tenant Selection Plan Best Practices (Attachment B1 of the RFP).

We are committing to at least one resident per bedroom except for cases where reasonable accommodations are necessary due to a disability.

15. Describe the affirmative marketing strategy and any other strategies to engage the target populations for this proposal. Specifically outline how this development's marketing will be consistent with the City of Madison's Affirmative Marketing Plan Best Practices (Attachment B-2 of the RFP), especially for Asian and Latinx populations which tend to be under-represented in AHF Completion Reports.

This project will adhere to the City of Madison Affirmative Marketing Plan Best Practices Selection listed on Attachment B-2 of the RFP. We have attached the project's Tenant Selection Plan and will follow fair housing law to ensure all people have access to this housing. Additionally, at least 6 months prior to obtaining certificate of occupancy we will reach out to organizations such as the Homeless Services Consortium (HSC) and Neighborhood Resource Teams.

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

All units will be set aside for households where one member has a disability. 60 of the units are for people experiencing homelessness. To market to the most vulnerable and least likely to apply, best practices in the past included partnering with local agencies who provide coordinated entry or referrals for individuals seeking housing. We will continue this process and lenient application criteria to help ensure access. Our property manager, Wisconsin Management Company, and Housing Initiatives both have experience with marketing to people with disabilities and/or experiencing homelessness.

17. Describe the proposed development's security deposit policy (e.g., ½ or 1x's rent, other set amount(s), criteria for variations if credit is conditional, etc.). Is the higher deposit policy waived for households with a guaranteed rent subsidy or voucher? What is the minimum required income to rent ratio (e.g., 1.5 to 1)? Are the lease up policies consistent with the City's Tenant Selection Plan Best Practices (Attachment B-1 of the RFP)?

Not all units will require a security deposit. This will be dependent on the rental assistance being utilized. For units where a security deposit is required, a security deposit will be collected from tenants as follows:

- i. Security deposit is equal to one month's rent and is due with the signed lease. The amount of security deposits will not change if the rent amount changes.
- ii. Security deposits will be collected at the time of initial lease execution. Security deposits may be paid on an installment basis if the tenant is unable to pay the full amount at move-in AND inquires if installments are available.

18. What percentage of maximum LIHTC rents are used for 50 & 60% units? Describe the proposed development's policy toward limiting rent increases for lease renewals? How will it be ensured that prospective long-term tenants be protected from significantly and rapidly rising contract rents increases allowed under the published rent limits, even under the rent limit increase requirements in this RFP and Loan Agreement.

All units will technically be noted as 60% LIHTC units. The majority of units will have rental assistance and those units will income qualify at or below 50% of County Median Income based on existing program requirements. Most residents will fall under 30% CMI.

PUBLIC BENEFIT AND RISK

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

There is a high demand for affordable housing in the City of Madison, and with the limited access for people with disabilities or mental illness, this project will provide coordination to supportive services. Serving one of the most vulnerable group is a public need for the community. Both Movin' Out and Housing Initiatives have extensive experience and have a thorough plan to mitigate risk of limited leasing. There are currently 1,442 individuals on the waitlist for housing at Movin' Out and 741 individuals on the waitlist at Housing Initiatives. The biggest risk with this project is ensuring long term success for residents coming out of homelessness. We need to make sure they have access to the tools they need while also ensuring they are contributing to a safe and healthy community. With the organized and proven approaches both organizations have, risks are decreased.

SITE INFORMATION

20. Address of Proposed Site: This is a Scattered Sites projects with 23 locations. Please see attachment for details.
21. In which of the following areas on the Affordable Housing Targeted Area Map (see Attachment A) is the site proposed located? Please check one plus Limited Eligibility, if applicable.
- Preferred TOD Area
- Eligible Core Transit Area
- Preservation & Rehab Area (Ineligible for New Construction)
- Limited Eligibility Area
22. Identify the neighborhood in which the site is located: multiple
23. Date Site Control Secured: N/A - All sites are currently owned by either Movin' Out or Housing Initiatives
24. Explain why this site was chosen and how it helps the City to expand affordable housing opportunities where most needed. Describe the neighborhood and surrounding community. Provide the streets of the closest major intersection as well as known structures/activities surrounding the site that identifies where the site is located. (Attach a map indicating project location. Include one close-up map of the site and a second map using the AHF Targeted Area Map to show the site in the context of the City.)
- Movin' Out and Housing Initiatives already own a variety of scattered site properties in Madison. Each organization selected as many units as feasible based on existing debt that needed to be paid off and condition of the property.
25. Identify any existing buildings on the proposed site, noting any that are currently occupied. Describe the planned demolition of any buildings on the site, if applicable.
- All of the 23 sites have existing properties that are occupied. We anticipate completing temporary relocation with the units that are part of the project and have budgeted accordingly within the capital budget.
26. Describe the historical uses of the site. Identify if a Phase I Environmental Site Assessment has been completed and briefly summarize any issues identified. Identify any environmental remediation activities planned, completed, or underway, and/or any existing conditions of environmental significance located on the proposed site.
- Sites are existing single-family or small multi-family. Phase I reports will be required by the lender and investor along with lead based paint and asbestos analyses. We do not anticipate any issues on this end given that Movin' Out and Housing Initiatives have utilized and maintained all of the sites for residential use.
27. Current zoning of the site: See attached An interactive version of the Zoning Map can be found linked [here](#).
28. Describe any necessary planning and zoning-related approvals (rezoning, conditional use permit, demolition, etc.) that must be obtained for the proposal to move forward.
- This is a scattered sites development located in 23 different locations with 79 units. Please see attached document for current zoning classifications. Movin' Out will be rehabbing 71 of the units, so rezoning, variances, special or conditional use permits are not required. The units are all located in the City of Madison. While the project is contemplating new construction on one of the currently held properties, we have not yet been able to complete a feasibility analysis to determine the most appropriate site. Once we know more about that piece of the project we will reach out to related Alder and City staff members for further discussion.
29. Describe the proposed project's consistency with the land use recommendations, goals and objectives as may be relevant in adopted [plans](#), including the City of Madison Comprehensive Plan (adopted 2018), Neighborhood Plans, Special Area Plans, the Generalized Future Land Use Map (interactive version linked [here](#)), and any other relevant [plans](#).
- The City has been supportive of the project concept. We first discussed the concept in 2021 but decided to hold off on applying for soft funding until we were further along with the project details. On June 30, 2022 we meet with City staff including Julie Spears, Linette Rhodes, and Matt Frater. Due to the scattered site of the sites we have not met with the various Alders. While the project is contemplating new construction on one of the currently held properties, we have not yet been able to complete a feasibility analysis to determine the most appropriate site. Once we know

more about that piece of the project we will reach out to related Alder and City staff members for further discussion. The plan for this project is consistent with relevant jurisdiction plans. Many plans note the needs to upgrade and enhance existing properties to improve aesthetics, environmental quality, safety, and accessibility. Plans also note the need for affordable housing.

30. Identify the distance the following amenities are from the proposed site.

Type of Amenities & Services	Name of Facility	Distance from Site (in miles)
Full Service Grocery Store	See attached sheet	
Public Elementary School		
Public Middle School		
Public High School		
Job-Training Facility, Community College, or Continuing Education Programs		
Childcare		
Public Library		
Neighborhood or Community Center		
Full Service Medical Clinic or Hospital		
Pharmacy		
Public Park or Hiking/Biking Trail		
Banking		
Retail		
Other (list the amenities):		

31. What is the actual walking distance (in miles) between the proposed site and the nearest seven-day per week transit stops (i.e. weekday and weekends)? List the frequency of service at that bus stop during the weekday at noon. List the bus route(s), major transit stop street intersections and describe any other transit stops (include street intersections and schedule) located near the proposed site. Please do not include full bus schedules. Please refer to [Metro's Adopted Network Redesign](#) and answer based on the best available information at the time of application.

See attached list noting the closest bus stop to each of the 23 sites.

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

All 23 sites are existing properties within residential neighborhoods offering the same access to schools as the rest of the neighborhood. In addition, at least 60 of the units will be targeted to homeless households where someone has a mental disability. In Housing Initiatives current clientele there are no children in these units.

33. Describe the anticipated transit options for people to access employment and amenities such as childcare, after school activities, grocery stores, the nearest library, neighborhood centers, and other amenities described above.

See attached list that notes proximity to amenities as well as bus stops. All of the properties are well integrated into existing communities with high access to amenities and bus stops.

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

The project will not have an impact on existing schools as the 23 sites already exist and function as residential units. As a mostly rehab project there will be no change to population.

CITY AND COMMUNITY ENGAGEMENT PROCESSES

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

Not applicable - project is a rehab project. The new construction location will be determined in one of our existing properties. Once that site is selected we will meet with City staff.

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

Not applicable - project is a rehab project. The new construction location will be determined in one of our existing properties. Once that site is selected we will meet with City staff.

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

Not applicable - project is a rehab project. The new construction location will be determined in one of our existing properties. Once that site is selected we will meet with Alders. The attached site list identifies the many Alders associated with the scattered site locations.

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

Not applicable - project is a rehab project. The new construction location will be determined in one of our existing properties. Once that site is selected we will meet with community and neighborhood groups.

39. The COVID-19 pandemic has changed the way that residents have been able to interact with local government on impacts of new development. Detail how the Development Team has engaged and communicated with not only with the existing neighborhood, but with potential future tenants of your building as part of the community engagement process. What groups, if any, have you identified that were not engaged through this process? How has engagement with potential future tenants impacted the design process for the proposed development?

Not applicable - project is a rehab project.

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

Regarding the new construction, to engage we will attend neighborhood association meetings and meet with Alders prior to new construction to answer any questions and provide information regarding leasing. Due to the high demand of the type of housing Movin' Out provides, which is affordable and supportive housing we tend to receive positive feedback and invitation to provide even more housing stock in the same areas.

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

Both Movin' Out and Housing Initiatives take pride in providing housing for all no matter a person's background. Current best practices already incorporate many of the points mentioned in the Racial Equity and Social Justice Initiative and will continue to do so. Movin' Out has monthly project debriefs and one of the topics is racial equity, this helps to ensure goals are met on an ongoing basis. The scattered sites are well integrated in communities with access to living wage jobs, high-quality education, a healthy food, efficient public transit, parks and green spaces. These amenities are available to all people.

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

Movin' Out is the primary developer of this project and is a growing organization. We currently have a multiple projects that are in partnership with ACRE Alum. They have ownership stake in the projects and we will continue to consider future internships, employment opportunities, or development partnerships. Movin' Out has also instituted and implemented a Racial Equity Strategic Plan the includes increasing the number of staff members that are persons of color. Since this project is a preservation project with sites already owned by two local non-profits, there is not a specific partnership opportunity.

SITE AMENITIES

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

All of the buildings are scattered site single family, duplex, and four-plex units. There are no shared exterior common amenities. The new construction building will include approximately 5,000 square feet for Housing Initiatives. This space will serve as both administrative and service space for HI clients.

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

There are no shared interior common amenities.

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

TBD. The current sites have a mix of off street parking and garages.

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

The new construction building will include 5,000 square feet for Housing Initiatives to continue and improve upon their much needed service work. That space will be used both for administrative and service functions.

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

For the 71 units currently occupied, utilities are paid in full for all units; all units have AC; all buildings have free, on-site laundry machines; smoking is prohibited inside all buildings; and all units come equipped with standard appliances such as refrigerator, stove, and microwave.

PROPOSAL TIMELINE

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

Activity/Benchmark	Estimated Month/Year of Completion
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [<i>Target/Actual Month/Date</i>]	September 2022
1 st Development Assistance Team/ Meeting (Due by 8/4/22) [<i>Target/Actual Month/Date</i>]	N/A
1 st Neighborhood Meeting (Due by 8/17/22) [<i>Target Month/Date</i>]	N/A
Submission of Land Use Application (Zoning Map Amendments Due by 9/26/22)	N/A
Submission of Land Use Application (Permissively Zoned Due by 10/10/22)	N/A
Plan Commission Consideration (If Rezoning, 11/21/22 Meeting for 12/6/22 Common Council)	N/A
Urban Design Commission Consideration, if applicable [<i>Target Month/Date</i>]	N/A
Application to WHEDA	January 2023
Complete Equity & Debt Financing	June 2023
Acquisition/Real Estate Closing	July 2023
Rehab or New Construction Bid Publishing	March 2023
New Construction/Rehab Start	June 2023
Begin Lease-Up/Marketing	Ongoing
New Construction/Rehab Completion	September 2024
Certificates(s) of Occupancy Obtained	September 2024
Complete Lease-Up	September 2024
Request Final AHF Draw	September 2024

HOUSING INFORMATION & UNIT MIX

49. Provide the following information for your proposed project. List the property address along with the number of units you are proposing by size, income category, etc. If this is a scattered site proposal, list each address separately with the number of units you are proposing by income category, size, and rent for that particular address and/or phase. Attach additional pages if needed.

ADDRESS #1:		Scattered Sites throughout Madison - see attached					Projected Monthly Unit Rents, Including Utilities				
% of County Median Income (CMI)	Total # of units	# of Bedrooms					\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
		# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs					
≤30%	0	0	0	0	0	0					
40%	0	0	0	0	0	0					
50%	0	0	0	0	0	0					
60%	0	8	21	46	3	1					
Affordable Sub-total	0	8	21	46	3	1					
80%	0	0	0	0	0	0					
Market*	0	0	0	0	0	0					
Total Units	0	8	21	46	3	1	Notes/Utility Allowance Assumptions:*Please note that most units are covered by some type of rental assistance. For the purpose of a LIHTC approach the units are noted as 60% units. All units with rental assistance will be rented to households at or below 50% CMI for a portion of the units at at or below 30% CMI for the remaining depending on the funding source providing the rental assistance. The new construction units consist of 4 studios and 4 one-bedrooms.				

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

ADDRESS #2:		# of Bedrooms					Projected Monthly Unit Rents, Including Utilities				
% of County Median Income (CMI)	Total # of units	# of Studios	# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs	\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
40%	0	0	0	0	0	0					
50%	0	0	0	0	0	0					
60%	0	0	0	0	0	0					
Affordable Sub-total	0	0	0	0	0	0					
80%	0	0	0	0	0	0					
Market*	0	0	0	0	0	0					
Total Units	0	0	0	0	0	0	Notes/Utility Allowance Assumptions:				

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

NOTE: For proposals contemplating project-based vouchers (PBVs), please list vouchered units under the same CMI designation that you will be representing to WHEDA (e.g. if the LIHTC application to WHEDA presents 8 PBV units as 50% CMI or 60% CMI units, please include those on the "50%" or "60%" row in the above

table(s)). The City of Madison will enforce this income designation in the AHF Loan Agreement, if this proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.

50. Utilities/amenities included in rent: Water/Sewer Electric Gas Free Internet In-Unit
 Washer/Dryer Other: _____

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

Unit Size (Number of Bedrooms)	Total Monthly Utility Allowance (\$)
Efficiency	<u>0</u>
1-Bedroom	<u>0</u>
2-Bedroom	<u>0</u>
3-Bedroom	<u>0</u>

ENERGY EFFICIENCY, RENEWABLE ENERGY & SUSTAINABLE DESIGN

52. What is your organization’s experience in developing projects that incorporate extraordinary sustainable, energy efficient, and/or green building design techniques? Please list any awards, industry standards or third-party certifications achieved on projects developed in the past ten years, such as LEED®, WELL, Passive House, etc.

Movin' Out has a long history of developing projects that incorporate sustainability measures. We have previously complied with Green Built Homes, provided solar panels for projects, and have strong engagement from board and staff to continue with sustainable efforts for future projects. For this scattered site project we will be looking to add any energy efficiency approaches that we are able through the rehabilitation. We have already had discussions with MG&E regarding technical assistance and energy related upgrades.

53. Describe how this proposed development will contribute to the City’s goal of 100% renewable energy and net-zero carbon emissions (originally adopted March 21, 2017). What size/range of solar array is anticipated? If not yet known, what percentage energy offset is the development aiming to provide via the solar array. For more information, see [100% Renewable Madison Report](#).

N/A - the project is a rehab project. We have already had discussions with MG&E regarding technical assistance and energy related upgrades.

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

N/A - the project is a rehab project. We have already had discussions with MG&E regarding technical assistance and energy related upgrades. The project would not be a candidates for one of the above mentioned certifications.

55. How will this project contribute to creating a walkable, human-scaled community both inside and outside the property lines?

The scattered sites are located in well integrated communities with high access to linkages. The nature of single-family, duplex, and four-unit buildings that are integrated into the overall community directly contributes to a walkable, human-scaled community.

56. Describe how the local south-Central Wisconsin climate will inform the design of the proposed development and the challenges it will present.

The project is a rehabilitation project. One of the goals is increase energy efficiency to better address heating and cooling costs and make the buildings more sustainable.

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

The project is a rehab project so there will not be any changes to the on-site water system.

58. What building design and HVAC considerations will your team include to enhance community resiliency for building inhabitants in the face of a potential future pandemic?

The project is a rehab project. Unless needed based on the Capital Needs Assessment we are unlikely to replace HVAC systems. That being said, the units types (single family, duplex, and four-units) naturally allow for more airflow and limited transmission between units.

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

All existing units currently meeting code requirements. Many units have had upgrades to meet accessibility needs for the residents throughout the years. Movin' Out and Housing Initiatives are committed to upgrading accessibility in as many units as possible through the rehabilitation. This will be dependent on the CNA and budget.

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

Movin' Out and Housing Initiatives are committed to increasing Universal Design wherever possible. Movin' Out has significant experience in this area and operates with the approach that many Universal Design approaches do not cost additional money or impact marketability. Examples include floor selections and light switch height. Movin' Out utilizes a standard reference document that is shared with all general contractors and architects. This document details out Movin' Out's expectations when it comes to Universal Design. We will incorporate as many of these as possible through this rehabilitation project.

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

We have not yet completed a Capital Needs Assessment. That work is planned for late summer 2022. A sampling will be available for submission later this summer.

REAL ESTATE PROJECT DATA SUMMARY

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

	# of Units Prior to Purchase	# of Units Post-Project	# Units Occupied at Time of Purchase	# Biz or Residential Tenants to be Displaced	# of Units Accessible Current?	Number of Units Post-Project Accessible?	Appraised Value Current (Or Estimated)	Appraised Value After Project Completion (Or Estimated)	Purchase Price
Address:	See attached worksheet								
	71	71 + 8 new construction on an existing site	71	All temporarily	Unknown at this time	TBD	Unknown	Unknown	Purchase price is determined based on outstanding first mortgage debt at each site that needs to be paid off.
Address:	Enter Address 2								
Address:	Enter Address 3								

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

There are 23 existing buildings with a variety of building types - single-family, duplex, and four-plex units. All units needs rehab work completed to ensure long term viability. All units are occupied.

64. Will any business or residential tenants will be displaced temporarily or permanently? If so, please describe the relocation requirements, relocation plan and relocation assistance that you will implement or have started to implement.

All existing units are currently occupied. Residents will be temporarily relocated consistent with the Uniform Relocation Act utilizing other units that are part of the project. A relocation consultant will be used and funding is set aside in the capital budget for relocation.

DEVELOPMENT TEAM

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

The project will be structured like a typical tax credit partnership. Please see the provided org chart. The project LLC will be owned 99.99% by the investor member and 0.01% by the Managing Member. Movin' Out and Housing Initiatives will be members of the managing member. The split of this managing member has not yet been determined.

66. For projects that will be co-developed with a non-profit partner, please explain the non-profit's role in the development. State if the non-profit will have a controlling interest (as memorialized in organizational documents), Right of First Refusal, or General Partner Purchase Option. If not, please elaborate on how the non-profit organization will be involved in the long-term ownership of the development.

Both Movin' Out and Housing Initiatives are non-profits. We will co-own the project. Movin' Out will be lead developer with Housing Initiatives consulting as-needed. Both Movin' Out and Housing Initiatives will retain the right of first refusal for the properties that they bring into the partnership.

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

N/A

68. Identify all key roles in your project development team, including architect, general contractor, legal counsel, property management agent, supportive services provider(s), and any other key consultants, if known.

Contact Person	Company	Role in Development	E-mail	Phone
Kathryne Auerback	Movin' Out, Inc.	Executive Director	kathryne@movin-out.org	608-628-4879
Megan Schuetz	Movin' Out, Inc.	Development Manager	megan@movin-out.org	608-692-1667
Dave Porterfield	Movin' Out, Inc.	Senior Advisor	dave@movin-out.org	608-770-3123
Mary Myers	Movin' Out, Inc.	Asset Manager	mary@movin-out.org	608-320-2458
Loreen Gage	Movin' Out, Inc.	Rental Program Assistant Manager	loreen@movin-out.org	414-303-5016
Brad Hinkfuss	Housing Initiatives	Executive Director	bhinkfuss@housinginitiatives.org	608-620-1751
Russ Endres	Wisconsin Management	President, CEO Property Manager	rendres@wimci.com	608.308.4218
Katie Rist	Foley & Lardner	Attorney	krist@foley.com	608-258-4317
Chris Fearn	SVA	Accountant	fearnc@sva.com	608-826-2408

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

Company	Role in Development	BIPOC		Women	
		#	%	#	%
Movin' Out, Inc.	Developer	7	43.75%	12	75%
Housing Initiatives	Co-Developer	1	11.11%	4	44.44%

N/A	Co-Developer				
TBD	General Contractor				
Wisconsin Management	Property Manager	38	19.48%	88	45.12%
TBD	Architect				
Housing Initiatives	Service Provider	1	11.11%	4	44.44%

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

Once the project has paid off the deferred developer fee we will be able to to make payments to the City. This is currently anticipated in Year 13.

REFERENCES

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

Name	Relationship	Email Address	Phone
Don Bernards - Baker Tilly	Provides consulting and accounting services	donald.bernards@bakertilly.com	608-240-2643
Chris Jaye - The Commonwealth Companies	Co-Development Partner on 6 projects	c.jaye@commonwealthco.net	608-824-2294
Brandon Rule - Rule Enterprises	Co-Development Partner on 2 projects	brule@ruleenterprisesllc.com	414-810-2139

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

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

NOTE: If a preliminary site plan is not available at the time of application, submittal will be required for DAT on August 4, 2022 with submittal with week prior. If the Capital Needs Assessment is not available at the time of application for a rehab project, submittal will be required by August 17, 2022.

APPLICANT & PROJECT NAME:

Movin Out Housing Initiatives Scattered Sites

1. CAPITAL BUDGET

Enter ALL proposed project funding sources.

FUNDING SOURCES

Source	Amount	Non-Amortizing (Y/N)	Rate (%)	Term (Years)	Amort. Period (Years)	Annual Debt Service
Permanent Loan-Lender Name:						
WHEDA	\$ 3,773,731	Y	6.20%	18	40	\$255,505
Subordinate Loan-Lender Name:						
Subordinate Loan-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
AHP Loan (List FHLB):						
Total City Request (AHF, TIF, federal funds, etc.)	\$ 2,960,000	N				
Other-Specify Lender/Grantor:						
Existing Soft Loans	\$ 3,318,697	N				
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 3,859,059					
Historic Tax Credit Equity						
Deferred Developer Fees	\$ 503,470					
Owner Investment						
Other-Specify:						
Total Sources	\$ 14,414,957					

Do you plan on submitting an application for TIF?

No

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
WHEDA	\$ 9,850,000	6.20%	30
Bridge Loan-Lender Name:			
Existing Soft Loans	\$ 3,318,697		24
Tax Credit Equity:	\$ 964,764		
Total	\$ 14,133,461		

Estimated pricing on sale of Federal Tax Credits: **\$ 0.84**

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

Remarks Concerning Project Funding Sources:

The soft funding request is lumped into one large sum as we have requested funds from both the City of Madison and Dane County. We recognize that the City funds may need to be separated based on various payment standards. The Existing Soft Loans are funds that are already part of the various scattered sites. They will be noted as both a source and a use in order to move those loans forward with the new tax credit partnership.

APPLICANT:

Movin' Out, Inc.

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$0
Existing Buildings/Improvements	\$0
Other (List)	
Payoff of Existing Mortgages	\$4,751,517
Construction:	
Construction/Rehab Costs	\$4,669,643
Construction Profit	\$233,482
Construction Overhead	\$93,393
General Requirements	\$233,482
Construction Supervision	\$0
FF&E/Personal Property	\$15,000
Demolition	\$0
Site Work	\$0
Landscaping	\$0
Letter of Credit/P&P Bond	\$0
Construction Contingency	\$784,500
Other (List)	
	\$0
Architectural & Engineering	
Architect - Design	\$176,400
Architect - Supervision	\$25,000
Engineering	\$25,000
Other (List)	
	\$0
Interim/Construction Costs	
Builder's Risk/Property Insurance	\$90,000
Construction Loan Interest	\$250,000
Construction Loan Origination Fee	\$163,154
Real Estate Taxes	\$142,000
Park Impact Fees	\$0
Other Impact Fees	\$0
Other (List)	
WHEDA Loan App Fee & Legal	\$15,500
Financing Fees	
Cost of Bond Issuance	\$200,000
Permanent Loan Origination Fee	\$56,606
Credit Enhancement	\$0
Other Permanent Loan Fees	\$30,000
Soft Costs	
Appraisal	\$20,700
Market Study	\$7,500

<--- If applicable, please list the costs attributable to "above and beyond" green building/Net Zero construction components included in the Construction Costs line item:

N/A - Rehab

Total Cost: **\$0**

Environmental Reports	\$69,000
Survey	\$80,500
Permits	\$0
Lease-Up Period Marketing	\$2,000
Tax Credit Fees - Application	\$2,000
Tax Credit Fees - Compliance	\$0
Tax Credit Fees - Allocation	\$45,946
Accounting/Cost Certification	\$67,500
Title Insurance and Recording	\$50,000
Relocation	\$158,000
FF&E	\$0
Capital Needs Assessment (if rehab)	\$35,500
Legal	\$150,000
Other (List)	
Soft Cost Contingency	\$30,000
Fees:	
Bridge Loan Fees	\$0
Organizational Fees	\$0
Syndication Fees	\$65,000
Total Development Fee	\$1,250,000
Developer Overhead	\$0
Other Consultant Fees	\$0
Other (List)	
	\$0
Reserves Funded from Capital:	
Lease-Up Reserve	\$50,000
Operating Reserve	\$376,635
Replacement Reserve	\$0
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$0
Other: (List)	
	\$0
TOTAL COSTS:	\$14,414,958

APPLICANT: Movin' Out, Inc.

3. PROJECT PROFORMA

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

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15	Year 16
Gross Income	936,636	955,369	974,476	993,966	1,013,845	1,034,122	1,054,804	1,075,900	1,097,418	1,119,367	1,141,754	1,164,589	1,187,881	1,211,639	1,235,871	1,260,589
Less Vacancy/Bad Debt	37,465	38,215	38,979	39,759	40,554	41,365	42,192	43,036	43,897	44,775	45,670	46,584	47,515	48,466	49,435	50,424
Income from Non-Residential Use*	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Revenue	899,171	917,154	935,497	954,207	973,291	992,757	1,012,612	1,032,864	1,053,522	1,074,592	1,096,084	1,118,006	1,140,366	1,163,173	1,186,436	1,210,165
Expenses:																
Office Expenses and Phone		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Real Estate Taxes	94,800	97,644	100,573	103,591	106,698	109,899	113,196	116,592	120,090	123,692	127,403	131,225	135,162	139,217	143,394	147,695
Advertising, Accounting, Legal Fees	8,000	8,240	8,487	8,742	9,004	9,274	9,552	9,839	10,134	10,438	10,751	11,074	11,406	11,748	12,101	12,464
Payroll, Payroll Taxes and Benefits	30,000	30,900	31,827	32,782	33,765	34,778	35,822	36,896	38,003	39,143	40,317	41,527	42,773	44,056	45,378	46,739
Property Insurance	20,000	20,600	21,218	21,855	22,510	23,185	23,881	24,597	25,335	26,095	26,878	27,685	28,515	29,371	30,252	31,159
Mtc, Repairs and Mtc Contracts	65,000	66,950	68,959	71,027	73,158	75,353	77,613	79,942	82,340	84,810	87,355	89,975	92,674	95,455	98,318	101,268
Utilities (gas/electric/fuel/water/sewer)	204,000	210,120	216,424	222,916	229,604	236,492	243,587	250,894	258,421	266,174	274,159	282,384	290,855	299,581	308,568	317,825
Property Mgmt	52,264	53,832	55,447	57,110	58,824	60,588	62,406	64,278	66,206	68,193	70,238	72,346	74,516	76,751	79,054	81,426
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	23,700	24,411	25,143	25,898	26,675	27,475	28,299	29,148	30,022	30,923	31,851	32,806	33,791	34,804	35,848	36,924
Support Services	94,800	97,644	100,573	103,591	106,698	109,899	113,196	116,592	120,090	123,692	127,403	131,225	135,162	139,217	143,394	147,695
Other (List)		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Operating Expenses	592,564	610,341	628,651	647,511	666,936	686,944	707,552	728,779	750,642	773,162	796,356	820,247	844,855	870,200	896,306	923,195
Net Operating Income	306,607	306,813	306,846	306,696	306,355	305,813	305,060	304,085	302,879	301,430	299,727	297,758	295,511	292,973	290,130	286,970
Debt Service:																
First Mortgage	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
Asset Management Fee	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
Adjust for 7% vacancy year 1	28,100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	288,605	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	255,505
Total Annual Cash Expenses	881,169	870,846	889,156	908,016	927,441	947,449	968,057	989,284	1,011,147	1,033,667	1,056,861	1,080,752	1,105,360	1,130,705	1,156,811	1,178,700
Total Net Operating Income	18,002	46,308	46,341	46,191	45,850	45,308	44,555	43,580	42,374	40,925	39,222	37,253	35,006	32,468	29,625	31,465
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	18,002	46,308	46,341	46,161	45,850	45,308	44,555	43,580	42,374	40,925	39,222	37,253	7,591	0	0	0
Cash Flow	0	0	0	30	0	0	0	0	0	0	0	0	27,415	32,468	29,625	31,465
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	27,415	32,468	29,625	31,465

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

DCR Hard Debt	1.20	1.20	1.20	1.20	1.20	1.20	1.19	1.19	1.19	1.18	1.17	1.17	1.16	1.15	1.14	1.12
DCR Total Debt	1.06	1.18	1.18	1.18	1.18	1.17	1.17	1.17	1.16	1.16	1.15	1.14	1.03	1.00	1.00	1.00

Assumptions

Vacancy Rate	4.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%

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

N/A

Other

Vacancy Year 1 would be 7% and then 4

APPLICANT:

Movin' Out, Inc.

3. PROJECT PROFORMA (cont.)

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

	Year 17	Year 18	Year 19	Year 20	Year 21	Year 22	Year 23	Year 24	Year 25	Year 26	Year 27	Year 28	Year 29	Year 30
Gross Income	1,285,801	1,311,517	1,337,747	1,364,502	1,391,792	1,419,628	1,448,020	1,476,981	1,506,520	1,536,651	1,567,384	1,598,731	1,630,706	1,663,320
Less Vacancy/Bad Debt	51,432	52,461	53,510	54,580	55,672	56,785	57,921	59,079	60,261	61,466	62,695	63,949	65,228	66,533
Income from Non-Residential Use*	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Revenue	1,234,368	1,259,056	1,284,237	1,309,922	1,336,120	1,362,843	1,390,099	1,417,901	1,446,259	1,475,185	1,504,688	1,534,782	1,565,478	1,596,787
Expenses:														
Office Expenses and Phone	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Real Estate Taxes	152,126	156,690	161,391	166,232	171,219	176,356	181,647	187,096	192,709	198,490	204,445	210,578	216,896	223,402
Advertising, Accounting, Legal Fees	12,838	13,223	13,619	14,028	14,449	14,882	15,329	15,789	16,262	16,750	17,253	17,770	18,303	18,853
Payroll, Payroll Taxes and Benefits	48,141	49,585	51,073	52,605	54,183	55,809	57,483	59,208	60,984	62,813	64,698	66,639	68,638	70,697
Property Insurance	32,094	33,057	34,049	35,070	36,122	37,206	38,322	39,472	40,656	41,876	43,132	44,426	45,759	47,131
Mtc, Repairs and Mtc Contracts	104,306	107,435	110,658	113,978	117,397	120,919	124,547	128,283	132,132	136,096	140,178	144,384	148,715	153,177
Utilities (gas/electric/fuel/water/sewer)	327,360	337,181	347,296	357,715	368,447	379,500	390,885	402,612	414,690	427,131	439,945	453,143	466,737	480,739
Property Mgmt	83,868	86,384	88,976	91,645	94,395	97,226	100,143	103,148	106,242	109,429	112,712	116,093	119,576	123,164
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	38,032	39,172	40,348	41,558	42,805	44,089	45,412	46,774	48,177	49,623	51,111	52,645	54,224	55,851
Support Services	152,126	156,690	161,391	166,232	171,219	176,356	181,647	187,096	192,709	198,490	204,445	210,578	216,896	223,402
Other (List)														
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Expenses	950,891	979,418	1,008,801	1,039,065	1,070,236	1,102,344	1,135,414	1,169,476	1,204,561	1,240,697	1,277,918	1,316,256	1,355,744	1,396,416
Net Operating Income	283,477	279,638	275,436	270,857	265,884	260,499	254,686	248,425	241,699	234,487	226,770	218,526	209,734	200,371
Debt Service:														
First Mortgage	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505	255,505
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
Asset Management Fee	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
Adjust for 7% vacancy year 1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Debt Service	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505	260,505
Total Annual Cash Expenses	1,211,396	1,239,923	1,269,306	1,299,570	1,330,741	1,362,849	1,395,919	1,429,981	1,465,066	1,501,202	1,538,423	1,576,761	1,616,249	1,656,921
Total Net Operating Income	22,972	19,133	14,931	10,352	5,379	-6	-5,819	-12,080	-18,806	-26,018	-33,735	-41,979	-50,771	-60,134
Debt Service Reserve	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Deferred Developer Fee	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cash Flow	22,972	19,133	14,931	10,352	5,379	-6	-5,819	-12,080	-18,806	-26,018	-33,735	-41,979	-50,771	-60,134
AHF City Interest Loan	22,972	19,133	14,931	10,352	5,379	0	0	0	0	0	0	0	0	0

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

DCR Hard Debt	1.11	1.09	1.08	1.06	1.04	1.02	1.00	0.97	0.95	0.92	0.89	0.86	0.82	0.78
DCR Total Debt	1.00	1.00	1.00	1.00	1.00	1.00	0.98	0.95	0.93	0.90	0.87	0.84	0.81	0.77

Assumptions

Vacancy Rate	4.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

TABLE OF CONTENTS

Movin' Out Housing Initiatives Scattered Sites Project Madison, WI

1. Application
2. Attachment D
3. Budget Workbook
4. Org Chart
5. Experience & Capacity
6. Site Location Details Including Maps
7. Tenant Selection Plan
8. Supportive Services Plan
9. Supportive Services MOU's

ATTACHMENT D

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Proposers are hereby notified that all information submitted in response to this RFP may be made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

- Requests for confidentiality must be submitted prior to the proposal submission date to the City of Madison Purchasing Office.
- Requests for confidentiality must use this designated form. Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The City considers other markings of confidential in the bid/proposal document to be insufficient.
- Any information to be considered confidential or proprietary must be separated and packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.

Prices always become public information when bids/proposals are opened or when negotiations have been completed and the contract has been awarded. Other information usually cannot be kept confidential unless it involves a trade secret as defined in §.134.90(1)(c), Wis. Stats. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in §. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

In the event the designation of confidentiality of this information is challenged, the undersigned hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and agrees to hold the City of Madison harmless for any costs or damages arising out of the City's agreeing to withhold the materials.

The attached material submitted in response to Bid/Proposal #_____ includes proprietary and confidential information which qualifies as a trade secret, as provided in §s.19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released:

Section	Page No.	Topic	Specific law that supports confidentiality of information

Company Name Movin' Out, Inc.

Enter Name: Kathryne Auerback

By entering your initials in the box,

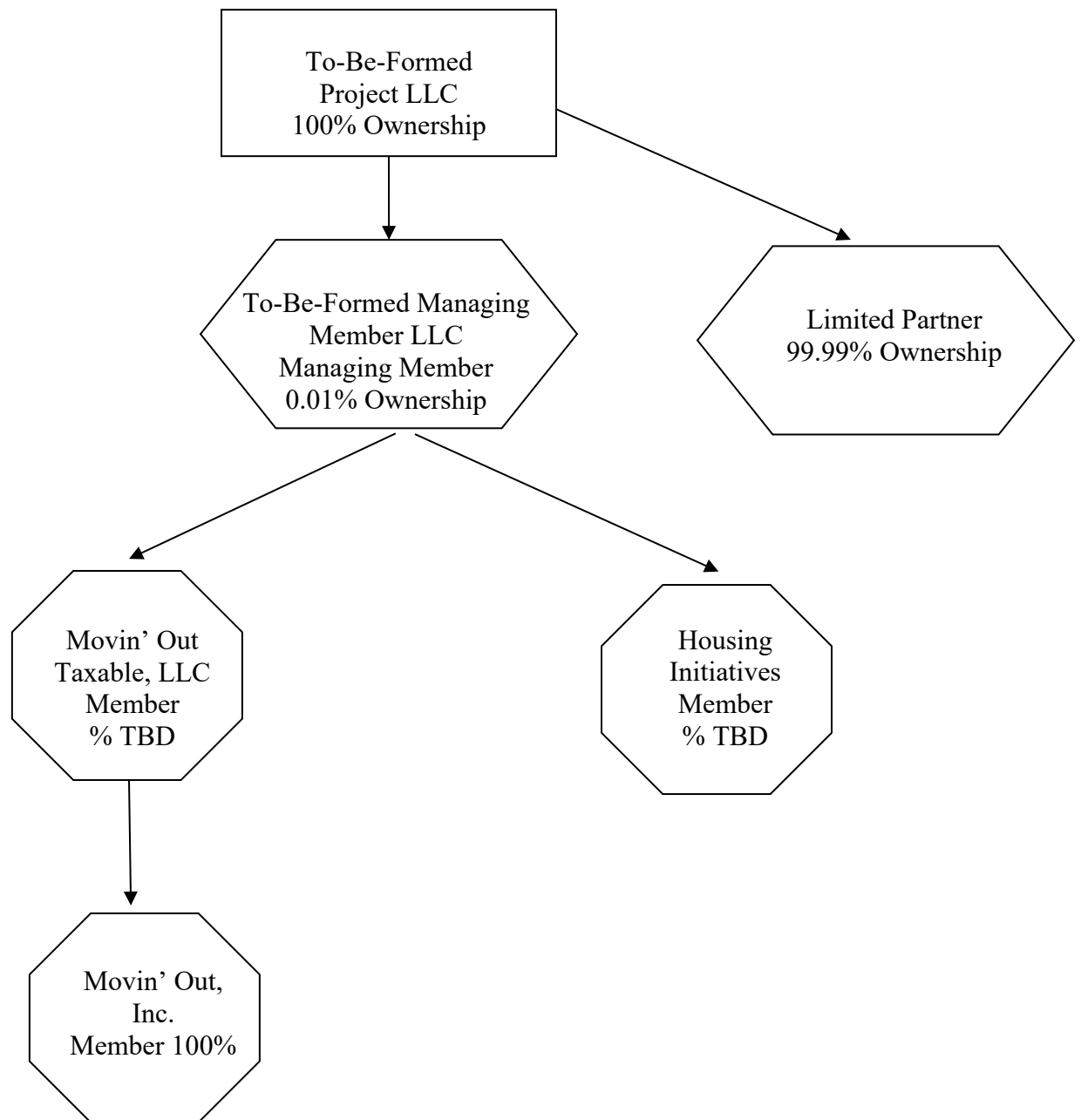
KA

You are electronically signing your name and agreeing to the terms above.

Date: 7-18-2022



ORGANIZATIONAL CHART





DEVELOPMENT TEAM EXPERIENCE & CAPACITY

MOVIN' OUT EXPERIENCE OVERVIEW

Movin' Out, Inc. is an over 25-year old 501(c)3 non-profit organization, overseen by a board of directors, and serving individuals with disabilities and families with a member with a disability, as well as veterans, across the state of Wisconsin. Movin' Out provides a range of safe, community-integrated, affordable housing solutions, from HUD-certified housing counseling and assistance with down-payment and rehab, to a variety of rental housing options.

We work in close partnership with human service agencies to ensure that households who need supportive services to be successful in their homes have a commitment for those services as part of their housing plan. We work with property management organizations to ensure high quality ongoing management and maintenance. Movin' Out provides Tenant Success Services to residents who live in supportive units to address the gap between property management and supportive services provided by others.

Movin' Out, Inc. has assisted over 1,600 low-income households to purchase homes. Additionally, during the past 15 years, Movin' Out, Inc. has developed and owns and operates over 1,200 units of affordable rental units in five Wisconsin counties. We have participated in the entire development process, from planning and securing capital subsidies to coordinating with partners through design and construction and then managing the process through lease-up and long term operations.

HOUSING INITIATIVES EXPERIENCE OVERVIEW

Housing Initiatives, Inc. was founded in 1993 with one employee and one duplex in which to provide housing. Since then, the organization has grown incrementally to 33 properties and 151 units. In building this extensive portfolio, Housing Initiatives has pursued a model of smaller, neighborhood-integrated housing in which to house some of the most vulnerable people in the community. The mission of providing quality housing to the formerly homeless and severely mentally ill has remained a constant throughout the past 28 years. The client base includes both families and singles. 100% of HI units are reserved for the formerly homeless and severely mentally ill, and the organization has positioned itself as one of the vanguard organizations offering permanent supportive housing to those most vulnerable with the community coordinated entry system.

OBTAINING AND UTILIZING FEDERAL, STATE, CITY AND OTHER FINANCING

Movin' Out is uniquely qualified to obtain and use a variety of funding sources including, but not limited to, AHP, HOME, CDBG, TIF, Section 811, and Project-Based Section 8. We have participated in more than 15 Low Income Housing Tax Credit developments in Wisconsin. Movin' Out is fully qualified to maximize WHEDA's Developer Experience points and is also able to obtain additional team points due to its non-profit status. In addition, as a certified non-profit and CHDO we are able to utilize funding sources, such as HOME funds, to further leverage the affordable housing deals we work on.

PARTICIPATING IN PUBLIC/PRIVATE JOINT VENTURES

Movin' Out focuses on developing affordable housing with many different partners, including public entities. We have worked with the City of Madison on multiple LIHTC developments in the last 5 years such as: The Royal, Pinney Lane Apartments, The Ace Apartments, Fourteen02 Park Apartments, and the recently funded Red Caboose Apartments. At Movin' Out we find that our mission of providing affordable housing to individuals with a disability is a common need for many cities and towns allowing us to develop a working relationship with the communities to work together in meeting that demand for housing.



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

STAFF QUALIFICATIONS

The Movin' Out Rental Development Team consists of senior level experts in managing complex housing and disability programs. They have significant professional experience and competencies in all the necessary areas to successfully develop and operate the proposed housing. Movin' Out, Inc.'s key development staff include Megan Schuetz, Narik Riak, and Dave Porterfield.

Megan Schuetz, Real Estate Development Program Manager, joined Movin' Out in the summer of 2018, bringing years of real estate development experience from a for-profit developer in Wisconsin. Over the last 15 years she has worked on over 50 developments totaling more than \$500M. Megan is experienced in working on affordable housing throughout Wisconsin including utilization of Low Income Housing Tax Credits, Historic Tax Credits, FHLB AHP, and many other soft funding sources. She is responsible for taking projects from inception through completion.

Narik Riak, Real Estate Development Associate, is a recent graduate of the University of Wisconsin - Madison, where she studied sustainable development, affordable housing development, and policy. She also completed the Urban Land Institute Real Estate Associate Program. Her professional experience includes internships with Baker Tilly, New Year Investments, MSP Real Estate and others where she gained hands-on experience with Low Income Housing Tax Credit projects.

Dave Porterfield, Senior Advisor, has nearly 30 years of affordable housing development experience. He has been involved with Movin' Out since its inception, providing a range of consulting and advisory services to the organization. Dave joined the staff nearly 13 years ago to lead Movin' Out's development projects. He has extensive experience with a wide range of financing programs including, but not limited to, HUD Section 811 and Section 42 Tax Credits.

In addition to the Rental Development Team, Movin' Out employs staff with deep experience in leadership, community engagement, program development and compliance, asset management, and housing counseling.

Kathryne Auerback, Executive Director, joined the organization in Spring 2018. She brings over 25 years of experience leading change for healthier and more equitable organizations and communities. She has managed numerous green building and other environmental and health-related enterprises. Her experience includes designing and leading a broad range of innovative community and economic development initiatives. Auerback earned her MA and MBA degrees from UW-Madison.

As the Asset Manager, **Mary Myers** has a key role in preserving and increasing the quality and sustainability of the properties Movin' Out reserves for low-income tenants with disabilities. She tracks the financial and operational performance of Movin' Out's housing portfolio, communicates with property management firms, and composes required reports to public and private agencies. As asset manager, Mary is also responsible for knowing and interacting with tenants, their supportive service teams, and guardians or family members. She has extensive training in numerous aspects of asset and property management.

Loreen Gage, Rental Program Assistant Manager, joined Movin' Out in September 2021. Prior to joining our team, Ms. Gage served as the director of client services at Housing Initiatives. She has extensive experience in working in social services, and helping families with affordable housing. She is also the president of the Monona Grove School Board. Ms. Gage earned a BA in Communications, and a MA in Human Services.

Ravea Alexis, Resident Services Coordinator, joined Movin' Out in January 2021. As the Resident Services Coordinator he aims to holistically support the health and wellbeing of Movin' Out's rental residents for greater independence, successful tenancy and housing stability. Ravea brings tremendous warmth and open-heartedness,



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

keen intellect and charming wit, plus an impressive resume that includes past professional experience supporting people in need.

Denise Anderson-Alexander, Finance Director, brings 9 years of financial leadership experience to our executive leadership team, including working with Morgan Stanley and most recently with Savills, a global real estate company. Her real estate development financial management expertise will help Movin' Out expand its impacts especially in the area of affordable housing development. She earned a BBA in Accounting from Texas Southern University, a Master of Arts in Law from the University of London, and an MBA in Finance and Investment Management from the University of Houston.

Amy Kallas, Managing Director, began her work at Movin' Out as a Housing Counselor and later moved into the role of Program Compliance Manager, managing operations, grant writing, and reporting. She was promoted to Associate Director in 2017. Amy holds a degree in Psychology from the UW-Stevens Point. Prior to joining Movin' Out Amy worked at various human services agencies in direct services, support coordination, and management.

Vivien Rayam, Home Ownership and Housing Counseling Program Director, brings extensive affordable housing and housing counseling program leadership experience at local and national levels, including management positions with Operation HOPE in Atlanta, NeighborWorks America, and the U.S. Department of Housing & Urban Development. This deep expertise prepares her to help Movin' Out expand our home ownership and housing counseling services. Vivien earned a BA in Journalism and Political Science from the University of Rhode Island, an MS in Community Economic Development specializing in nonprofit management, and an MBA from Capella University.

Rebecca Wiese is a HUD-certified Housing Counselor and Housing Program Manager who has been with Movin' Out for over 15 years. She previously worked for 9 years helping people with developmental disabilities to find jobs in the Madison area. Rebecca earned her degree in Social Work from UW-Oshkosh.

Janice Moen, Office Manager, joined Movin' Out, Inc. in January 2019. She brings 30+ years of progressive experience including accounting and financial management, human resources administration, business development, facilities management, client care, and team support. Moen earned a Bachelor of Business Administration degree from the University of Wisconsin – Madison.

Isheena Murphy, Program Associate, joined Movin' Out in June 2020. She has over 14 years' experience in administrative roles, including 7 years as an office manager, over 20 years as a customer service representative, and extensive experience in the nonprofit sector.

Jamal Mosley, a Housing Counselor Specialist, joined Movin' Out in October 2020. He has over 16 years' experience in various roles, including more than 10 years in youth programming and athletics, more than 6 years as a Higher Education Financial Aid Counselor and extensive experience in the education sector.

Theodore Yancey, Senior Housing Counselor, Joined Movin' Out in May of 2021. He has over 15 years of experience in the financial services industry including mortgage lending, banking, financial planning and insurance. He also has extensive experience in customer relationship management, account management, recruitment and unit system, and acceptance testing.

FINANCIAL CAPACITY

Movin' Out is a unique non-profit in that it operates on income generated through its work and does not rely on fundraising to operate. In our over 25 years in business, we have never had a foreclosure, have never defaulted,



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

and have never had the general partner replaced by the investor. Movin' Out also continues to prove its capacity by solely developing and owning projects and providing all necessary financial backing and guarantees.

Movin' Out has confirmed with various debt and equity sources that our liquid assets and net worth are sufficient to provide the required guarantees necessary to complete tax credit developments. We have extensive experience in working with a variety of lenders and investors. These references are available upon request. Financial statements are also available upon request.

EXPERIENCE WITH INTEGRATED SUPPORT HOUSING

Movin' Out was founded under the premise of providing integrated housing opportunities for individuals with disabilities. For over twenty years Movin' Out has focused its mission on establishing relationships and advocating for these individuals to ensure they have access to housing options. Specifically, in the last decade we have focused on developing multi-family housing with no more than 25% of the total units targeted to households where one member has a disability.

It is important to recognize that the WHEDA tax credit program provides access to a valuable source of financing. It is distributed through a highly competitive process which requires developers to compete for an award by committing to plan and operate the project in specific ways in exchange for points awarded through the application process. Movin' Out has worked closely with WHEDA to help shape Wisconsin's tax credit program to encourage this integrated supported housing model through the Integrated Supportive Housing points. The first project to include this approach is called Elven Sted which is located in Stoughton and was developed, owned, and operated by Movin' Out. That project served as a model for establishing this preference by WHEDA for this approach to providing supported housing in Wisconsin.

Other funding sources have started to recognize the substantial need for integrated supportive housing. Movin' Out has a wealth of experience in this area and brings real world, people-focused ideas and implementation approaches to every project it works on. To date, Movin' Out has developed over 250 units of integrated housing in almost 20 projects throughout Wisconsin.

Because this is a joint venture between two nonprofit housing organizations with somewhat overlapping missions the resulting project will provide tenants with access to a wide range of different types of supportive services to address an array of human service needs including those that are focused on assisting people who have experienced homelessness; people with any kind of permanent disability and military veteran specific services. Additionally, Housing Initiatives and Movin' Out staff each provide a portion of the required services directly. A description of those services is described below.

Housing Initiatives already has a strong supportive services program in place with four full time positions dedicated exclusively to supportive service work with HI clients. Supportive services are offered to all clients starting at move-in, or whenever needs may arise during tenancy. Holding true to a Housing First approach, these services are offered universally and consistently, but no services are required as a prerequisite or an ongoing condition of continued housing.

A primary activity of HI staff members is to build unique support networks around each client. These support networks utilize the various public services noted above, as well as an extensive array of public and private organizations that represent various specialized services. The strength of the HI program is that the staff act as advocates for clients from the first day of move-in, building relationships and serving as architects of supportive service planning to connect clients with the most appropriate services in the community. Staff themselves also serve a critical role in directly supporting clients; they meet, train, coordinate, coach and interact with clients on a more immediate basis than most other service providers. This type of generalized support, coupled with the



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

specialized support of other agencies, provides for a very effective approach. A sampling of supportive services/agencies might include Journey Mental Health, the Aging & Disability Resource Center, Tellurian, iCare, SOAR Case Management, primary medical care, dental care, domestic abuse intervention, food resources, educational opportunities, employment assistance and much more.

Movin' Out's approach to ensuring services are available to the tenants in its supportive housing units is similar to that of Housing Initiatives. MOI has three dedicated staff that help to connect and coordinate tenants to a wide range of supportive services including many of the same providers that work with HI tenants. The primary distinction between the two agencies is that Housing Initiatives works exclusively with homeless and mentally ill tenants and Movin' Out primarily works with people with various kinds of disabilities but who may or may not have experienced homelessness and Movin' Out does not receive funding support from the homeless system funding sources.

PROPERTY MANAGEMENT

Movin' Out and Housing Initiatives are partnering with Wisconsin Management Company on the Movin' Out Housing Initiatives Scattered Site project. WMC will play a critical role in the ongoing success of the project.

Wisconsin Management is a full service professional third party property management company. The company was founded in 1977 and specializes in providing property management services for affordable housing communities. Movin' Out has direct previous experience working with Wisconsin Management who is currently managing one of our Madison based multifamily projects. Movin' Out has extensive experience with several management companies and has selected Wisconsin Management as the company, this is in our experience best suited for this project. Wisconsin Management Company has shown support for working with Housing Initiatives to ensure the needs of the homeless clients are best met by an organization with the long-standing history and experience in serving the homeless community.

ARCHITECTURAL/SERVICE/GREEN BUILDING AWARDS & CERTIFICATIONS

The development team has yet to select its architectural partner on the Scattered Site project. When able, Movin' Out has provided a high level of green building in its multi-family developments. Recent projects have included certification from the Wisconsin Green Built Home program and the utilization of solar panels. We will look to include as many energy efficiency approach as possible on the Scattered Site project.

ORGANIZATIONAL CHART

See attached organization chart for the proposed project. Movin' Out and Housing Initiatives will serve as members of the Managing Member entity. In addition, Movin' Out is a certified CHDO in the City of Madison.



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

Board of Directors
As of October 31, 2021

Georgia Allen Co-Founder & CEO, Soaring Independent Cooperative	David Scribbins Movin' Out client and advocacy leadership	Lisa Barwinski AVP - Community Accountability Program Manager, Associated Bank
Sinikka Santala Retired, Wisconsin Dept. of Health Services	Valerie Brown Movin' Out homeowner, disability and housing advocate	Marvin Bynum II Real estate attorney, Godfrey & Kahn S.C.
Sariah Daine Sinikka Santala Retired, Wisconsin Dept. of Health Services	Russ Endres CEO, Wisconsin Management Company, Inc	Tony Freiberg Owner Freiberg's Hardscaping
Kingsley Goburne Senior Consultant – Talent Management and Diversity UnityPoint Health	Alex Law Program Manager Slipstream Group, Inc.	Nicole Robbins Executive Director, Martin Luther King Economic Development Corporation, Attorney, Real Estate
Alyssa Ryanjoy Senior Manager of Workplace Modernization, Cuna Mutual Group	Abigail Tessmann Transit2Go! and advocacy leadership	

MOVIN' OUT DEVELOPMENT EXPERIENCE

Pinney Lane Apartments
902-914 Royster Oaks Dr., Madison, WI 53714





DEVELOPMENT TEAM EXPERIENCE & CAPACITY

Pinney Lane Apartments is a newly constructed, 70-unit, three-story, multifamily rental housing development located near the intersection of Cottage Grove and Dempsey Roads on Madison's East side. The project opened in 2015. Pinney Lane meets an increasing need for affordable housing that integrates housing options for people with disabilities within the community. The housing is a mixed-income project with 59 units reserved for household with incomes below 60% of median of the Dane County Area Median Income. The remaining eleven units being rented to households with incomes below 80% AMI. Through affirmative fair housing marketing efforts Movin' Out targets 18 units to individuals with disabilities. The project was financed with WHEDA 9% tax credit equity, City of Madison Housing Trust Fund, City of Madison HOME funding and Federal Home Loan Bank of Chicago Affordable Housing Program funds as well as 8 project based Section 8 vouchers provided by the City of Madison CDA. It is part of a larger mixed-use redevelopment plan for the 28+ acre Royster Clark site that also includes the new City of Madison Public Library branch. This project was a joint venture between Movin' Out, Inc. and Stone House Development.

Elven Sted Apartments

831 Eighth Street Stoughton, WI



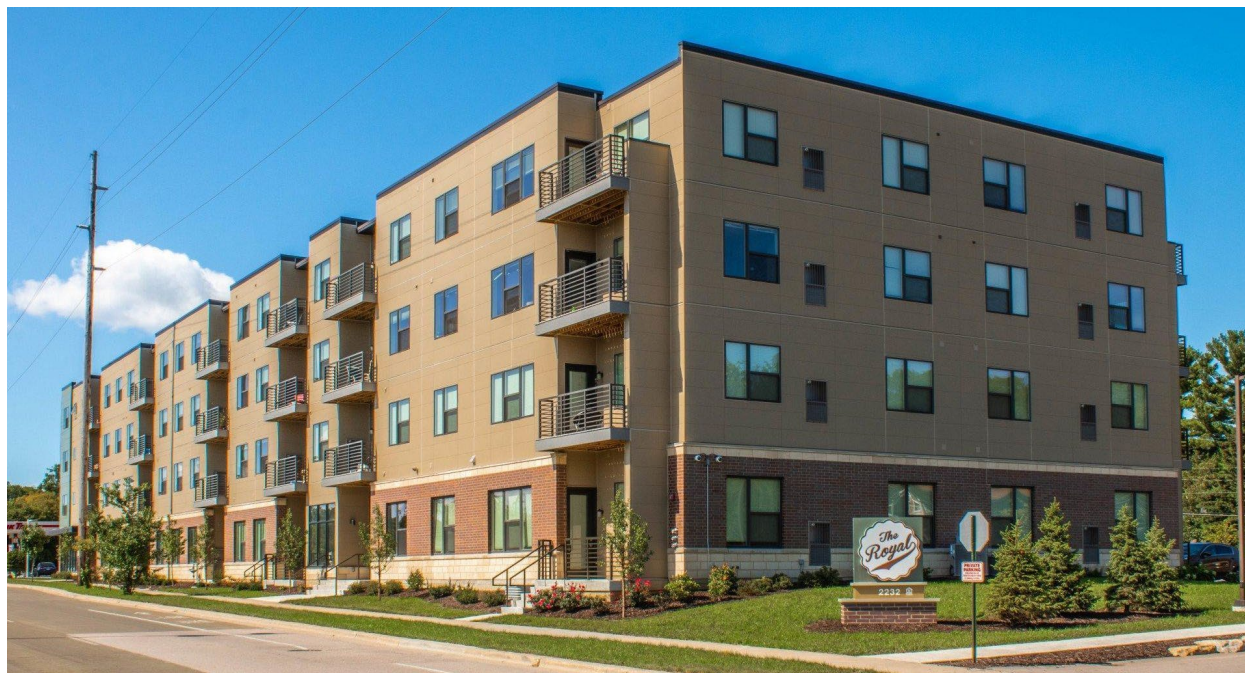
Elven Sted (River Place in Norwegian) is a 33-unit affordable rental project of new construction in a redevelopment area in Stoughton WI. Thirty-two of the units are tax credit set-aside units and one 3-bedroom unit is market rate. It is multi-family, mixed income community with units at 50%, 60%, and 80% CMI. The mix of 4 one-bedroom, 17 two-bedroom, and 12 three-bedroom units provide much needed affordable, accessible workforce housing as identified by local officials and community groups in Stoughton. Elven Sted serves both households that include people with disabilities and low-income workers, some of whom provide direct support/ residential services for disabled residents in Stoughton. These households benefit from having more affordable housing and living in close proximity to those they support. The site fronts on the Yahara River and is located in the central area of the City of Stoughton on a site at the south end of 8th Street. The site is approximately 2.5 acres in total. The site is located within the boundaries of a redevelopment area called the Rail Corridor Tax Increment District #5. Financing for Elven Sted included tax credit financing combined with Dane County HOME funds, state brownfield funding, and local TIF, combined with long term debt financing.



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

The Royal

2232 W. Broadway, Madison, WI 53713



Description: The Royal apartment project is a joint venture developed by Movin' Out and Mirus Partners. The project opened in November of 2018. The 48-unit mixed-use, multifamily project includes underground and surface parking and approximately 3,000 square feet of ground floor commercial space, a community room, and leasing office. There is also open green space and playground area. The project is comprised of 4 one-bedroom apartment units, 32 two-bedroom apartment units and 12 three-bedroom apartment units designed for family occupancy. The building is constructed to meet Wisconsin Green-Built Home standards. Through affirmative fair housing marketing efforts Movin' Out targets 12 units to individuals with disabilities. The project was financed with WHEDA 9% tax credit equity, City of Madison Housing Trust Fund, City of Madison HOME funding, Dane County Affordable Housing Funds, and Federal Home Loan Bank of Chicago Affordable Housing Program funds.

The Ace – Madison, WI

70 units of mixed-income Section 42 apartments in a mixed-use property in Madison completed in partnership with Commonwealth Development. The project includes 14 units of integrated supportive housing.

Cambrian Commons – Wisconsin Dells, WI

60 units of mixed-income Section 42 apartments in Wisconsin Dells incorporating 12 units of integrated supportive housing. The project is also financed with State of Wisconsin HOME funds.

Pioneer Ridge Apartments - Wisconsin Dells, WI

18 units of integrated supported housing integrated into a 72-unit mixed-income Section 42 financed project located in the Northeast section of Wisconsin Dells. This project is a joint venture with Mirus Partners.

Madison and Main - Waunakee, WI



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

10 units of supported housing integrated into a newly constructed 78-unit market rate, mixed-use project in downtown Waunakee, Wisconsin. Movin' Out partnered with CBH, LLC, a partnership of local business people from Waunakee, to plan and develop this innovative project.

Berkshire Greendale - Greendale, WI

11 units of affordable rental housing for seniors with permanent disabilities as part of a 90-unit independent senior housing project which Movin' Out did in partnership with General Capital Group. The project is financed with a combination of Section 42 tax credits and federal HOME funding.

Bradley Crossing - Brown Deer, WI

11-unit affordable rental housing project targeted for families who have family members with permanent disabilities which is part of a 60-unit Section 42 financed supportive housing project. Movin' Out completed this project in partnership with Jewish Family Services and General Capital Group.

Globe Apartments - Watertown, WI

11 units of supported housing integrated into a 48-unit Section 42 tax credit project located in downtown Watertown, WI. Movin' Out carried out this project in partnership with Mirus Partners and Horizon Development and Construction.

Harbor House - Madison, WI

11-unit affordable rental project integrated within a 240-unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding

Middleton Senior Apartments - Middleton, WI

8 units of affordable rental housing project for seniors with permanent disabilities as part of a 56-unit independent senior housing project in which Movin' Out partnered with MSP Inc. The project is financed with a combination of Section 42 tax credits and federal HOME funding.

Maple Grove Commons - Madison, WI

20 units of supported housing integrated into a 78 unit mixed-income Section 42 financed project located on McKee Road in Southwest Madison as a joint venture with Oakbrook Corporation.

Monroe Street Apartments - Waterloo, WI

8 units of supported housing integrated into a 24-unit, mixed-income Section 42 project carried out as a joint venture with Mirus Partners and located in downtown Waterloo, WI, in Jefferson County.

New Berlin City Center - New Berlin, WI

102-unit affordable rental housing project for families with 11 units reserved for tenants who have family members with permanent disabilities. This project was developed in partnership with MSP Inc. The project is financed with a combination of section 42 tax credits and federal HOME funding.

North Lawn Avenue - Madison, WI

Redevelopment of existing older single-family home into a fully accessible rental duplex.

North Port - Glendale, WI

10-unit affordable rental project integrated within a 40-unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding.

Stonebridge - Madison, WI



DEVELOPMENT TEAM EXPERIENCE & CAPACITY

12-unit affordable rental project integrated within a 300-unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding.

West Bend - West Bend, WI

Acquisition and rehabilitation of a fully accessible rental duplex.

Ruxton in Platteville

71 units of mixed-income Section 42 apartments in a mixed-use property in Platteville completed in partnership with General Capital. The project includes 15 units of integrated supportive housing.

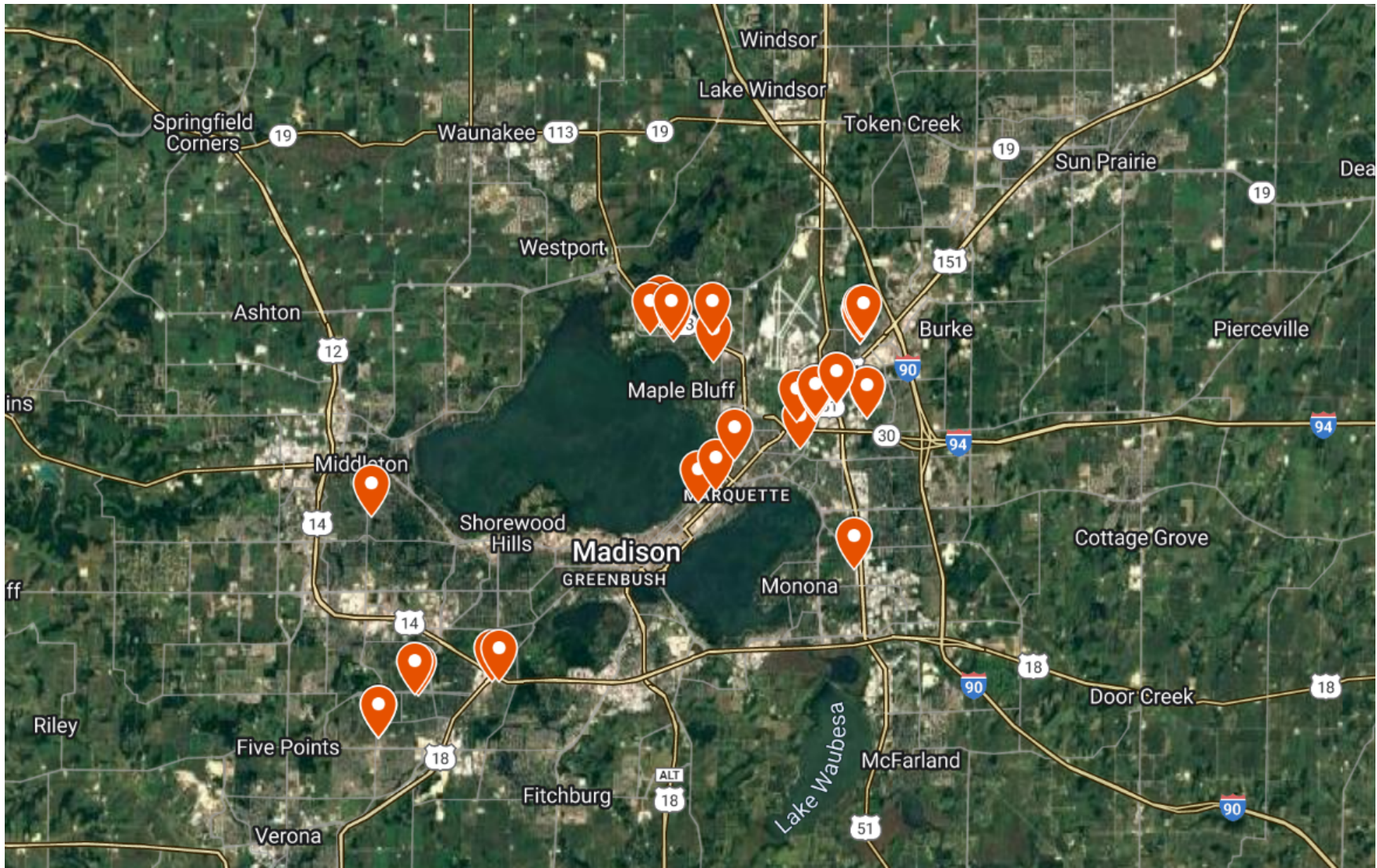
OTHER TEAM MEMBERS

SVA ACCOUNTING

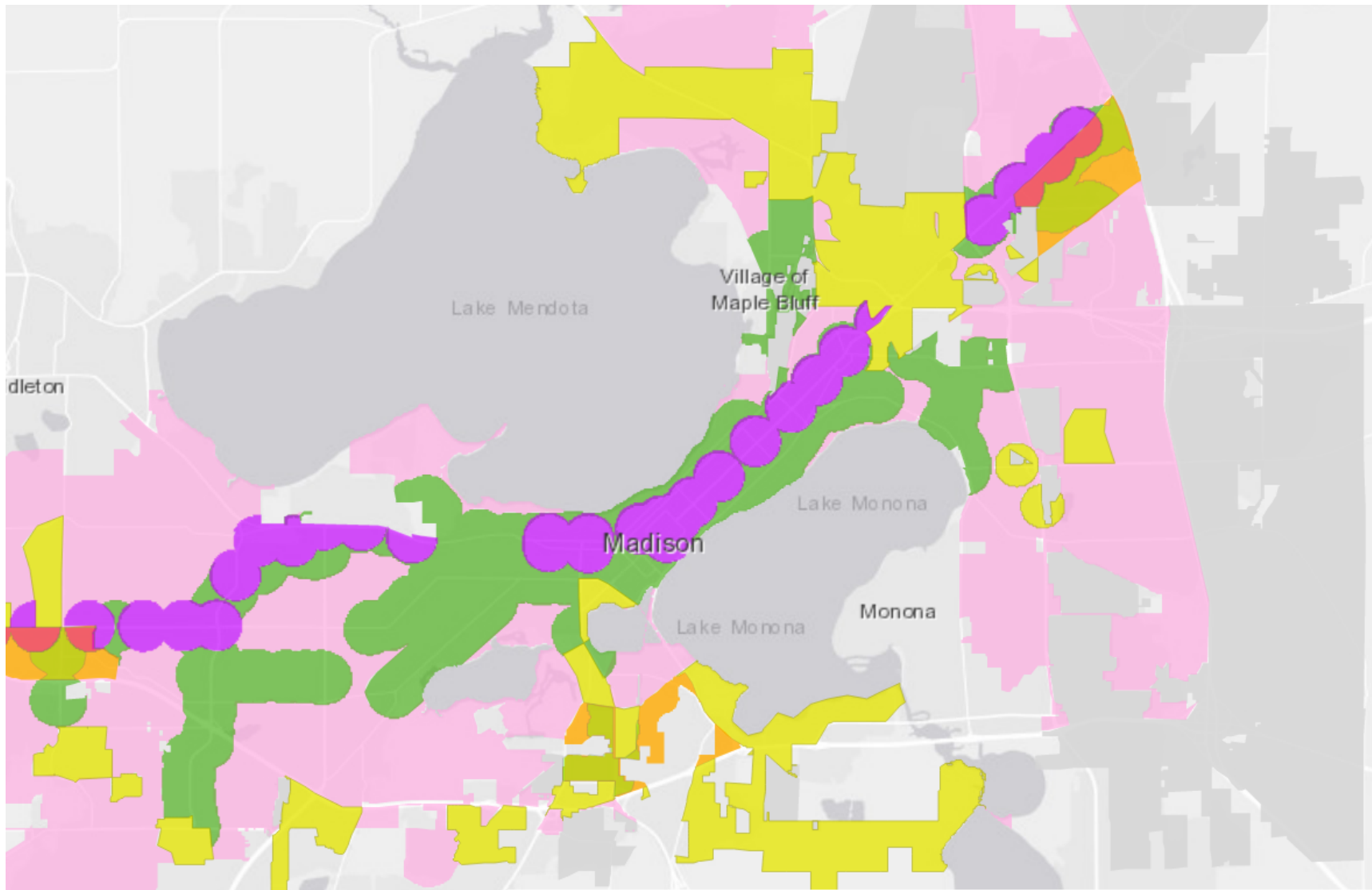
SVA Certified Public Accountants will guide the development team through the tax credit application and allocation process. SVA has been the accountant of record for over 65% of all tax credits issued in the State of Wisconsin. Their expertise starts during the development process with guidance on deal structure, equity pricing and accounting compliance. SVA will serve as the project's ongoing accountant and financial advisor.

FOLEY AND LARDNER

Foley and Lardner will serve as legal advisors to the development team, providing comprehensive counsel during all phases of the project. During the pre-development phase, the firm will provide counsel and oversight for land acquisition and entitlements. They will also provide guidance to ensure the appropriate ownership structure falls under the tax credit program. The firm will be involved throughout the process to provide counsel regarding contracts, development agreements and guarantees.



Key	
Scattered Site Property	Red



Key	
Targeted Rehab Area	Yellow
New Construction Preferred	Green
Eligible for New Construction	Pink
Super Preferred Proposals	Purple

Area	#	Org	Street	City	State	Zipcode	2022 QCT	QCT #	Distance to LIHTC	Alder Name	Alder District	Bedroom	Parcel Number	Zoning
1	1	HI	2505 Brentwood Pkwy	Madison	WI	53704	No	22	0.77mile Tennyson Ridge	Syed Abbas	12	2	80936403049	SR-V1
	2	HI	2505 Brentwood Pkwy	Madison	WI	53704	No	22	0.77mile Tennyson Ridge	Syed Abbas	12	2	80936403049	SR-V1
	3	HI	2505 Brentwood Pkwy	Madison	WI	53704	No	22	0.77mile Tennyson Ridge	Syed Abbas	12	2	80936403049	SR-V1
	4	HI	2505 Brentwood Pkwy	Madison	WI	53704	No	22	0.77mile Tennyson Ridge	Syed Abbas	12	2	80936403049	SR-V1
2	5	HI	34 Powers Ave	Madison	WI	53714	No	20	0.31 mile Fair Oaks Apts	Grant Foster	15	2	71005107191	TR-V1
	6	HI	34 Powers Ave	Madison	WI	53714	No	20	0.31 mile Fair Oaks Apts	Grant Foster	15	1	71005107191	TR-V1
	7	HI	34 Powers Ave	Madison	WI	53714	No	20	0.31 mile Fair Oaks Apts	Grant Foster	15	1	71005107191	TR-V1
3	8	HI	3734 W Karstens Dr	Madison	WI	53704	No	23.02	1.53mile Tennyson Ridge	Charles Myadze	18	2	80926406110	SR-V1
	9	HI	3734 W Karstens Dr	Madison	WI	53704	No	23.02	1.53mile Tennyson Ridge	Charles Myadze	18	2	80926406110	SR-V1
	10	HI	3734 W Karstens Dr	Madison	WI	53704	No	23.02	1.53mile Tennyson Ridge	Charles Myadze	18	2	80926406110	SR-V1
4	11	HI	425 Troy Dr	Madison	WI	53704	Yes	23.01	1.74mile Tennyson Ridge	Charles Myadze	18	1	80935102254	SR-C1
	12	HI	425 Troy Dr	Madison	WI	53704	Yes	23.01	1.74mile Tennyson Ridge	Charles Myadze	18	1	80935102254	SR-C1
	13	HI	425 Troy Dr	Madison	WI	53704	Yes	23.01	1.74mile Tennyson Ridge	Charles Myadze	18	1	80935102254	SR-C1
	14	HI	425 Troy Dr	Madison	WI	53704	Yes	23.01	1.74mile Tennyson Ridge	Charles Myadze	18	1	80935102254	SR-C1
5	15	HI	4316 Melody Ln	Madison	WI	53704	No	26.02	1.24mile Eagle Harbor	Gary Halverson	17	1	81028105402	SR-V2
	16	HI	4318 Melody Ln	Madison	WI	53704	No	26.02	1.27mile Eagle Harbor	Gary Halverson	17	1	81028105402	SR-V2
	17	HI	4322 Melody Ln	Madison	WI	53704	No	26.02	1.21mile Eagle Harbor	Gary Halverson	17	1	81028105402	SR-V2
	18	HI	4328 Melody Ln	Madison	WI	53704	No	26.02	1.21mile Eagle Harbor	Gary Halverson	17	1	81028105402	SR-V2
6	19	HI	5028 Camden Rd	Madison	WI	53716	No	29	1.32mile Dempsey Place	Grant Foster	15	2	71016401201	SR-V1
	20	HI	5028 Camden Rd	Madison	WI	53716	No	29	1.32mile Dempsey Place	Grant Foster	15	2	71016401201	SR-V1
	21	HI	5028 Camden Rd	Madison	WI	53716	No	29	1.32mile Dempsey Place	Grant Foster	15	2	71016401201	SR-V1

	22	HI	5028 Camden Rd	Madison	WI	53716	No	29	1.32mile Dempsey Place	Grant Foster	15	2	71016401201	SR-V1
7	23	HI	5838 Balsam Rd	Madison	WI	53711	No	5.01	1.18mile Schroeder Apts	Yannette Figueroa Cole	10	2	60906203158	SR-V1
	24	HI	5838 Balsam Rd	Madison	WI	53711	No	5.01	1.18mile Schroeder Apts	Yannette Figueroa Cole	10	2	60906203158	SR-V1
	25	HI	5838 Balsam Rd	Madison	WI	53711	No	5.01	1.18mile Schroeder Apts	Yannette Figueroa Cole	10	2	60906203158	SR-V1
	26	HI	5838 Balsam Rd	Madison	WI	53711	No	5.01	1.18mile Schroeder Apts	Yannette Figueroa Cole	10	2	60906203158	SR-V1
8	27	HI	810 Brandie Rd	Madison	WI	53714	No	26.03	0.75mile Eagle Harbor	Erik Paulson	3	2	81033403106	SR-V1
	28	HI	812 Brandie Rd	Madison	WI	53714	No	26.03	0.75mile Eagle Harbor	Erik Paulson	3	2	81033403106	SR-V1
9	29	HI	1012 E Dayton St	Madison	WI	53703	No	18.04	0.14mile The Breese	Brian Benford	6	1	70913114058	TR-V1, WP-24
	30	HI	1012 E Dayton St	Madison	WI	53703	No	18.04	0.14mile The Breese	Brian Benford	6	1	70913114058	TR-V1, WP-24
	31	HI	1012 E Dayton St	Madison	WI	53703	No	18.04	0.14mile The Breese	Brian Benford	6	1	70913114058	TR-V1, WP-24
	32	HI	1012 E Dayton St	Madison	WI	53703	No	18.04	0.14mile The Breese	Brian Benford	6	1	70913114058	TR-V1, WP-24
10	33	HI	1336 E Mifflin St	Madison	WI	53703	No	18.04	0.06mile Valor Apts	Brian Benford	6	Eff	70913103126	TR-V1
	34	HI	1336 E Mifflin St	Madison	WI	53703	No	18.04	0.06mile Valor Apts	Brian Benford	6	Eff	70913103126	TR-V1
	35	HI	1336 E Mifflin St	Madison	WI	53703	No	18.04	0.06mile Valor Apts	Brian Benford	6	Eff	70913103126	TR-V1
	36	HI	1336 E Mifflin St	Madison	WI	53703	No	18.04	0.06mile Valor Apts	Brian Benford	6	Eff	70913103126	TR-V1
11	36	HI	1601 Troy Dr	Madison	WI	53704	Yes	24.02	0.48mile Tennyson Ridge	Charles Myadze	18	2	80936123069	SR-V2
	38	HI	1601 Troy Dr	Madison	WI	53704	Yes	24.02	0.48mile Tennyson Ridge	Charles Myadze	18	2	80936123069	SR-V2
	39	HI	1601 Troy Dr	Madison	WI	53704	Yes	24.02	0.48mile Tennyson Ridge	Charles Myadze	18	2	80936123069	SR-V2
	40	HI	1601 Troy Dr	Madison	WI	53704	Yes	24.02	0.48mile Tennyson Ridge	Charles Myadze	18	2	80936123069	SR-V2
12	41	HI	1822 Helene Pkwy	Madison	WI	53711	Yes	6	0.20mile Summit Ridge	Yannette Figueroa Cole	10	3	70932415320	SR-V1
	42	HI	1822 Helene Pkwy	Madison	WI	53711	Yes	6	0.20mile Summit Ridge	Yannette Figueroa Cole	10	1	70932415320	SR-V1
	43	HI	1822 Helene Pkwy	Madison	WI	53711	Yes	6	0.20mile Summit Ridge	Yannette Figueroa Cole	10	2	70932415320	SR-V1

	44	HI	1822 Helene Pkwy	Madison	WI	53711	Yes	6	0.20mile Summit Ridge	Yannette Figueroa Cole	10	2	70932415320	SR-V1
13	45	HI	2110 E Johnson St	Madison	WI	53704	No	21	0.38mile Red Caboose	Syed Abbas	12	2	71006301106	TR-V1
	46	HI	2110 E Johnson St	Madison	WI	53704	No	21	0.38mile Red Caboose	Syed Abbas	12	2	71006301106	TR-V1
	47	HI	2110 E Johnson St	Madison	WI	53704	No	21	0.38mile Red Caboose	Syed Abbas	12	2	71006301106	TR-V1
	48	HI	2110 E Johnson St	Madison	WI	53704	No	21	0.38mile Red Caboose	Syed Abbas	12	2	71006301106	TR-V1
14	49	HI	4329 Britta Dr	Madison	WI	53711	Yes	6	0.29mile Summit Ridge	Yannette Figueroa Cole	10	2	70932416039	SR-V1
	50	HI	4329 Britta Dr	Madison	WI	53711	Yes	6	0.29mile Summit Ridge	Yannette Figueroa Cole	10	2	70932416039	SR-V1
	51	HI	4329 Britta Dr	Madison	WI	53711	Yes	6	0.29mile Summit Ridge	Yannette Figueroa Cole	10	2	70932416039	SR-V1
	52	HI	4329 Britta Dr	Madison	WI	53711	Yes	6	0.29mile Summit Ridge	Yannette Figueroa Cole	10	2	70932416039	SR-V1
15	53	HI	706 Pinecrest Dr	Madison	WI	53711	Yes	26.01	0.04mile Madison Supportive Housing	Syed Abbas	12	2	81032430283	TR-V1
	54	HI	706 Pinecrest Dr	Madison	WI	53711	Yes	26.01	0.04mile Madison Supportive Housing	Syed Abbas	12	1	81032430283	TR-V1
	55	HI	706 Pinecrest Dr	Madison	WI	53711	Yes	26.01	0.04mile Madison Supportive Housing	Syed Abbas	12	2	81032430283	TR-V1
	56	HI	706 Pinecrest Dr	Madison	WI	53711	Yes	26.01	0.04mile Madison Supportive Housing	Syed Abbas	12	1	81032430283	TR-V1
16	57	HI	734 Fairmont Ave	Madison	WI	53714	Yes	26.01	0.39mile Madison Supportive Housing	Syed Abbas	12	2	81032424096	TR-V1
	58	HI	736 Fairmont Ave	Madison	WI	53714	Yes	26.01	0.39mile Madison Supportive Housing	Syed Abbas	12	2	81032424096	TR-V1
	59	HI	824 Fairmont Ave	Madison	WI	53714	Yes	26.01	0.41mile Madison Supportive Housing	Syed Abbas	12	2	81032416150	TR-V1
	60	HI	826 Fairmont Ave	Madison	WI	53714	Yes	26.01	0.41mile Madison Supportive Housing	Syed Abbas	12	2	81032416150	TR-V1
17	61	MOI	132 Ponwood Cir. #A	Madison	WI	53717	No	2.05	1.62mile Madison Family Lane Tree	Keith Furman	19	2	70813319253	PD

18	62	MOI	3004 Maple Valley	Madison	WI	53719	No	5.03	0.28mile Maple Grove	Nasra Wehelie	7	4	60801310123	SR-V1
	63	MOI	3006 Maple Valley	Madison	WI	53719	No	5.03	0.28mile Maple Grove	Nasra Wehelie	7	3	60801310123	SR-V1
19	64	MOI	3425 Marcy Rd unit 1	Madison	WI	53704	Yes	23.01	1.30 Tennyson Ridge	Charles Myadze	18	2	80936205122	SR-C3
	65	MOI	3425 Marcy Rd unit 2	Madison	WI	53704	Yes	23.01	1.30 Tennyson Ridge	Charles Myadze	18	2	80936205122	SR-C3
20	66	MOI	2016 Cameron Dr.	Madison	WI	53711	No	5.03	1.14mile Schroeder Apts	Yannette Figueroa Cole	10	3	60801101142	SR-C1
21	67	MOI	1217 MacArthur Rd	Madison	WI	53714	Yes	26.01	0.14mile Eagle Harbor	Erik Paulson	3	2	81033301144	SR-V1
	68	MOI	1221 MacArthur Rd	Madison	WI	53714	Yes	26.01	0.14mile Eagle Harbor	Erik Paulson	3	2	81033301144	SR-V1
22	69	MOI	805 Troy Dr.	Madison	WI	53704	No	23.01	1.33mile Tennyson Ridge	Charles Myadze	18	2	80936204091	SR-C3
23	70	MOI	2426 Independence Lane	Madison	WI	53704	No	26.02	1.40mile Eagle Harbor	Gary Halverson	17	2	81028105402	SR-V2
	71	MOI	2428 Independence Lane	Madison	WI	53704	No	26.02	1.40mile Eagle Harbor	Gary Halverson	17	2	81028105402	SR-V2

[City of Madison ArcGis](#)

Area	#	Org	Street	City	State	Zipcode	Housing Target Area	Housing Target Color
1	1	HI	2505 Brentwood Pkwy	Madison	WI	53704	Targeted Rehab Area	Yellow
	2	HI	2505 Brentwood Pkwy	Madison	WI	53704	Targeted Rehab Area	Yellow
	3	HI	2505 Brentwood Pkwy	Madison	WI	53704	Targeted Rehab Area	Yellow
	4	HI	2505 Brentwood Pkwy	Madison	WI	53704	Targeted Rehab Area	Yellow
2	5	HI	34 Powers Ave	Madison	WI	53714	New Construction Preferred	Green
	6	HI	34 Powers Ave	Madison	WI	53714	New Construction Preferred	Green
	7	HI	34 Powers Ave	Madison	WI	53714	New Construction Preferred	Green
3	8	HI	3734 W Karstens Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
	9	HI	3734 W Karstens Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
	10	HI	3734 W Karstens Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
4	11	HI	425 Troy Dr	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	12	HI	425 Troy Dr	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	13	HI	425 Troy Dr	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	14	HI	425 Troy Dr	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
5	15	HI	4316 Melody Ln	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	16	HI	4318 Melody Ln	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	17	HI	4322 Melody Ln	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	18	HI	4328 Melody Ln	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
6	19	HI	5028 Camden Rd	Madison	WI	53716	Eligible for New Construction & Rehab	Pink
	20	HI	5028 Camden Rd	Madison	WI	53716	Eligible for New Construction & Rehab	Pink
	21	HI	5028 Camden Rd	Madison	WI	53716	Eligible for New Construction & Rehab	Pink
	22	HI	5028 Camden Rd	Madison	WI	53716	Eligible for New Construction & Rehab	Pink
7	23	HI	5838 Balsam Rd	Madison	WI	53711	Targeted Rehab Area	Yellow
	24	HI	5838 Balsam Rd	Madison	WI	53711	Targeted Rehab Area	Yellow
	25	HI	5838 Balsam Rd	Madison	WI	53711	Targeted Rehab Area	Yellow
	26	HI	5838 Balsam Rd	Madison	WI	53711	Targeted Rehab Area	Yellow
8	27	HI	810 Brandie Rd	Madison	WI	53714	Eligible for New Construction & Rehab	Pink
	28	HI	812 Brandie Rd	Madison	WI	53714	Eligible for New Construction & Rehab	Pink
9	29	HI	1012 E Dayton St	Madison	WI	53703	Super Preferred Proposal	Purple
	30	HI	1012 E Dayton St	Madison	WI	53703	Super Preferred Proposal	Purple

	31	HI	1012 E Dayton St	Madison	WI	53703	Super Preferred Proposal	Purple
	32	HI	1012 E Dayton St	Madison	WI	53703	Super Preferred Proposal	Purple
10	33	HI	1336 E Mifflin St	Madison	WI	53703	Super Preferred Proposal	Purple
	34	HI	1336 E Mifflin St	Madison	WI	53703	Super Preferred Proposal	Purple
	35	HI	1336 E Mifflin St	Madison	WI	53703	Super Preferred Proposal	Purple
	36	HI	1336 E Mifflin St	Madison	WI	53703	Super Preferred Proposal	Purple
11	36	HI	1601 Troy Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
	38	HI	1601 Troy Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
	39	HI	1601 Troy Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
	40	HI	1601 Troy Dr	Madison	WI	53704	Targeted Rehab Area	Yellow
12	41	HI	1822 Helene Pkwy	Madison	WI	53711	Targeted Rehab Area	Yellow
	42	HI	1822 Helene Pkwy	Madison	WI	53711	Targeted Rehab Area	Yellow
	43	HI	1822 Helene Pkwy	Madison	WI	53711	Targeted Rehab Area	Yellow
	44	HI	1822 Helene Pkwy	Madison	WI	53711	Targeted Rehab Area	Yellow
13	45	HI	2110 E Johnson St	Madison	WI	53704	Super Preferred Proposal	Purple
	46	HI	2110 E Johnson St	Madison	WI	53704	Super Preferred Proposal	Purple
	47	HI	2110 E Johnson St	Madison	WI	53704	Super Preferred Proposal	Purple
	48	HI	2110 E Johnson St	Madison	WI	53704	Super Preferred Proposal	Purple
14	49	HI	4329 Britta Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
	50	HI	4329 Britta Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
	51	HI	4329 Britta Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
	52	HI	4329 Britta Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
15	53	HI	706 Pinecrest Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
	54	HI	706 Pinecrest Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
	55	HI	706 Pinecrest Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
	56	HI	706 Pinecrest Dr	Madison	WI	53711	Targeted Rehab Area	Yellow
16	57	HI	734 Fairmont Ave	Madison	WI	53714	Targeted Rehab Area	Yellow
	58	HI	736 Fairmont Ave	Madison	WI	53714	Targeted Rehab Area	Yellow
	59	HI	824 Fairmont Ave	Madison	WI	53714	Targeted Rehab Area	Yellow
	60	HI	826 Fairmont Ave	Madison	WI	53714	Targeted Rehab Area	Yellow
17	61	MOI	132 Ponwood Cir. #A	Madison	WI	53717	Eligible for New Construction & Rehab	Pink

18	62	MOI	3004 Maple Valley	Madison	WI	53719	Eligible for New Construction & Rehab	Pink
	63	MOI	3006 Maple Valley	Madison	WI	53719	Eligible for New Construction & Rehab	Pink
19	64	MOI	3425 Marcy Rd unit 1	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	65	MOI	3425 Marcy Rd unit 2	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
20	66	MOI	2016 Cameron Dr.	Madison	WI	53711	Eligible for New Construction & Rehab	Pink
21	67	MOI	1217 MacArthur Rd	Madison	WI	53714	Eligible for New Construction & Rehab	Pink
	68	MOI	1221 MacArthur Rd	Madison	WI	53714	Eligible for New Construction & Rehab	Pink
22	69	MOI	805 Troy Dr.	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
23	70	MOI	2426 Independence Lane	Madison	WI	53704	Eligible for New Construction & Rehab	Pink
	71	MOI	2428 Independence Lane	Madison	WI	53704	Eligible for New Construction & Rehab	Pink

	<u>Site 1</u>	<u>Site 2</u>	<u>Site 3</u>	<u>Site 4</u>	<u>Site 5</u>	<u>Site 6</u>	<u>Site 7</u>	<u>Site 8</u>
	<u>2505 Brentwood Pkwy</u>	<u>34 Powers Ave</u>	<u>3734 W Karstens Dr</u>	<u>425 Troy Dr</u>	<u>4316 Melody Ln</u>	<u>5028 Camden Rd</u>	<u>5838 Balsam Rd</u>	<u>810 Brandie Rd</u>
1	<u>Bus Stop</u> 0.16mile N Sherman & Trailsway Bus 22 7 days/week & Holiday Major intersection stop is Northport & Sherman Frequency is 15min	0.08mile Milwaukee & N Fair Oaks Bus 5, 7, 15, 17 7 days/week & Holiday This is a major intersection Frequency is 15min	0.13mile Troy & Karstens Bus 22 7 days/week & Holiday Major intersection stop is Northport & Sherman Frequency is 15min	0.06mile Troy & Harper Bus 22 7 days/week & Holiday Major intersection stop is Northport & Sherman Frequency is 15min	0.08mile Melody & Independence Bus 6 7 days/week & Holiday Major intersection stop is Hwy 51 & 151 Frequency is 30min	0.12mile Turner & Hob Bus 16, 38 7 days/week & Holiday Major intersection stop is Hwy 51 & Pflaum Frequency is 30min	0.15mile Raymond & Cameron Bus 50, 51 7 days/week & Holiday Major intersection stop is Whitney & Raymond Frequency is 30min	0.08mile Ziegler & Nakoosa Bus 30 7 days/week & Holiday Major intersection stop is Hwy 51 & 151 Frequency is 30min
2	<u>Social Services</u> 0.30mile Aging & Disability Center	0.34mile Salvation Army	0.68mile Dane County Foster Care Program	0.68mile Dane County Foster Care Program	0.56mile Community Action Coalition	0.20mile Babies & Beyond	0.77mile Multicultural Center	0.84mile Community Action Coalition
3	<u>Recreational Park or Trail (Biking or Hiking)</u> 0.20mile Warner Park	0.27mile O.B. Sherry Park	0.20mile Lerdahl Park	0.20mile Lerdahl Park	0.54mile Reindahl Park	0.28mile Monona Park	0.06mile Meadowood Park	0.48mile Mayfair Park
4	<u>Commercial or Retail</u> 0.30mile Goodwill Retail	0.98mile Madison East Shopping Mall	1.33mile Walgreens	1.33mile Walgreens	0.39mile East Towne Mall	0.08mile Blain Farm Fleet	0.26mile Meadowood Mall	0.27mile Walmart
5	<u>Clinic</u> 0.54mil UW Health	0.50mile Advocate Primary Care	1.62mile UW Health	1.62mile UW Health	0.95mile Women's Health Center	0.40mile SSM Health	1.40mile Meriter Health	0.72mile First Care
6	<u>Pharmacy</u> 0.37mile Walgreens Pharmacy	0.40mile Community Pharmacy East	1.33mile Walgreens Pharmacy	1.33mile Walgreens Pharmacy	0.85mile CVS Pharmacy	0.40mile SSM Health Pharmacy	1.40mile Meriter Health	0.27mile Walmart Pharmacy
7	<u>Municipal Facility (e.g. police, fire, city offices)</u> 1mile Village of Maple Bluff	0.64mile Public Health Office	0.97mile Fire Station	0.97mile Fire Station	0.80mile Fire Station	1.40mile Monona Fire	0.77mile Fire Station	0.85mile Fire Station
8	<u>Other Services (e.g. Senior Center)</u> 0.70mile Food Pantry	1mile Access Women's Center	1.40mile Aging & Disability Resource Center	1.40mile Aging & Disability Resource Center	0.35mile Senior Helpers	1.45mile Monona Senior Center	0.03mile NewBridge Senior Center	0.20mile Madison Pointe Senior Center
9	<u>Grocery Store</u> 0.25mile Willy Co-op	0.78mile Woodmans	1.36mile Willy Street Co-op	1.36mile Willy Street Co-op	0.85mile Aldi Grocery	0.74mile Viet Hoa Grocery	0.98mile Aldi Grocery	0.27mile Walmart Grocery
10	<u>Elementary School</u> 0.74mile Lakeview Elementary	0.64mile Lowell Elementary School	0.24mile Mendota Elementary	0.24mile Mendota Elementary	0.35mile Sandburg Elementary	0.54mile Henderson Elementary	0.45mile Huegel Elementary	0.98mile Hawthorne Elementary
11	<u>Middle School</u> 0.54mile Sherman Middle	0.77mile Whitehorse Middle School	1.17mile Blackhawk Middle School	1.17mile Blackhawk Middle School	2.95mile Blackhawk Middle School	0.51mile Sennett Middle School	0.75mile Toki Middle School	1.30mile Whitehorse Middle School
12	<u>High School</u> 0.54mile Shabazz High	1mile East High School	2.4mile Shabazz High	2.4mile Shabazz High	2.70mile Shabazz High School	0.51mile Lafollette High School	2.85mile Memorial High School	2.40 East High School
13	<u>Job Training, Community College, Continuing Education</u> 1.40mile Commercial Ave Education Center	1.30mile MATC	1.73mile Lakeland University	1.73mile Lakeland University	1.35mile MATC	2.28mile New Directions Nursing	1.96mile UW College Courses	1.60mile MATC
14	<u>Childcare</u> 0.45mile Northport Headstart	0.59mile Sunny Ridge Childcare	0.32mile Jamie Jungle Childcare	0.32mile Jamie Jungle Childcare	0.50mile Mami Family Care	0.77mile Campus for Kids	0.45mile New Era	0.98mile Kid's Crossing Childcare

15	<u>Library</u>	0.26mile Lakeview Library	0.65mile Hawthorne Public Library	1.38mile Lakeview Library	1.38mile Lakeview Library	2.60mile Lakeview Library	1.29mile Pinney Library	0.26mile Meadowridge Library	1.75mile Pinney Library
16	<u>Bank</u>	0.28mile Old National Bank	0.68mile PenFed Credit Union	0.81mile UW Credit Union	0.81mile UW Credit Union	0.30mile Old National Bank	0.87mile Monona Bank	0.26mile Old National Bank	0.50mile UW Credit Union
17	<u>Community Center</u>	0.41mile Warner Community Center	0.57mile Goodman Community	0.12mile Vera Court Neighborhood Center	0.12mile Vera Court Neighborhood Center	1.30mile East Community Center	1.45mile Monona Community Center	0.65mile Terrace Neighborhood Center	0.98mile Community Groundworks
18	<u>Jobs for Low Income & Travel Time</u>	0.37mile Walgreens	0.53mile Amazon	1.40mile Northside Town Center	1.40mile Northside Town Center	0.39mile East Towne Mall	0.40mile SSM Health	0.26mile Meadowood Mall	0.27mile Walmart

	Site 9	Site 10	Site 11	Site 12	Site 13	Site 14	Site 15	Site 16
	<u>1012 E Dayton St</u>	<u>1336 E Mifflin St</u>	<u>1601 Troy Dr</u>	<u>1822 Helene Pkwy</u>	<u>2110 E Johnson St</u>	<u>4329 Britta Dr</u>	<u>706 Pinecrest Dr</u>	<u>734 Fairmont Ave</u>
1	<u>Bus Stop</u> 0.12mile E Johnson & Baldwin Bus 2, 5, 28 7 days/week & Holiday Major intersection stop is E Washington & Baldwin Frequency is 15min	0.12mile E Johnson & Baldwin Bus 2, 5, 28 7 days/week & Holiday Major intersection stop is E Washington & Baldwin Frequency is 15min	0.06mile Northport & Warner Park Bus 21, 22 7 days/week & Holiday Major intersection stop is Northport & Sherman Frequency is 15min	0.10mile Veraon & Britta Bus 18 7 days/week & Holiday This is a major intersection Frequency is 30min	0.12mile E Johnson & Baldwin Bus 2, 5, 28 7 days/week & Holiday Major intersection stop is E Washington & Baldwin Frequency is 15min	0.10mile Veraon & Britta Bus 18 7 days/week & Holiday This is a major intersection Frequency is 30min	0.08mile E Washington & Rethke Bus 6 7 days/week & Holiday This is a major intersection Frequency is 15min	0.08mile Mayfair & Lexington Bus 17 7 days/week & Holiday Major intersection stop Hwy 51 & 151 Frequency is 15min
2	<u>Social Services</u> 0.12mile Social Work Department of Safety	0.12mile Social Work Department of Safety	0.46mile Dane County Foster Care Program	0.50mile Reach Dane	0.12mile Social Work Department of Safety	0.50mile Reach Dane	0.34mile Salvation Army	0.34mile Salvation Army
3	<u>Recreational Park or Trail (Biking or Hiking)</u> 0.26mile Yahara Park	0.26mile Yahara Park	0.38mile Warner Park	0.32mile Marlborough Park	0.26mile Yahara Park	0.32mile Marlborough Park	0.90mile McCormick Park	0.90mile McCormick Park
4	<u>Commercial or Retail</u> 0.23mile Grace Coffee	0.23mile Grace Coffee	0.38mile Walgreens	0.50mile Home Depot	0.23mile Grace Coffee	0.50mile Home Depot	0.98mile Madison East Shopping Mall	0.98mile Madison East Shopping Mall
5	<u>Clinic</u> 1mile UW Health	1mile UW Health	0.60mile UW Health	1.26mile Access Health	1mile UW Health	1.26mile Access Health	0.90mile William T Clinic	0.90mile William T Clinic
6	<u>Pharmacy</u> 1mile UW Health	1mile UW Health	0.38mile Walgreens Pharmacy	1.22mile Walgreens Pharmacy	1mile UW Health	1.22mile Walgreens Pharmacy	0.66mile Walgreens Pharmacy	0.66mile Walgreens Pharmacy
7	<u>Municipal Facility (e.g. police, fire, city offices)</u> 0.40mile Fire Station	0.40mile Fire Station	0.03mile Fire Station	2.22mile Police West District	0.40mile Fire Station	2.22mile Police West District	0.90mile Fire Station	0.90mile Fire Station
8	<u>Other Services (e.g. Senior Center)</u> 0.35mile Coalition for Wisconsin Health	0.35mile Coalition for Wisconsin Health	0.54mile Tennyson Senior Living Community	0.36mile Oak Noma Assisted Living	0.35mile Coalition for Wisconsin Health	0.36mile Oak Noma Assisted Living	0.90mile WI Institue Senior Center	0.90mile WI Institue Senior Center
9	<u>Grocery Store</u> 0.40mile Willy Street Co-op	0.40mile Willy Street Co-op	0.43mile Willy Street Co-op	0.28mile Luna Grovery	0.40mile Willy Street Co-op	0.28mile Luna Grovery	0.98mile Hyvee Grocery	0.98mile Hyvee Grocery
10	<u>Elementray School</u> 0.35mile Lapham Elementary	0.35mile Lapham Elementary	0.33mile Lakeview Elementary	0.96mile Orchard Ridge Elementary	0.35mile Lapham Elementary	0.96mile Orchard Ridge Elementary	0.50mile Hawthorne Elementary School	0.50mile Hawthorne Elementary School
11	<u>Middle School</u> 0.50mile O'Keeffe Middle School	0.50mile O'Keeffe Middle School	0.91mile Blackhawk Middle School	0.50mile Cherokee Middle	0.50mile O'Keeffe Middle School	0.50mile Cherokee Middle	1.40mile Whitehorse Middle School	1.40mile Whitehorse Middle School
12	<u>High School</u> 0.87mile East High School	0.87mile East High School	2mile Shabazz High	2.46mile Edgewood High School	0.87mile East High School	2.46mile Edgewood High School	1.66mile East High School	1.66mile East High School
13	<u>Job Training, Community College, Continuing Education</u> 1.80mile UW Madison	1.80mile UW Madison	2.10mile Lakeland University	2.40mile Edgewood College	1.80mile UW Madison	2.40mile Edgewood College	0.90mile MATC	0.90mile MATC
14	<u>Childcare</u> 0.66mile Big Oak Childcare Center	0.66mile Big Oak Childcare Center	0.32mile Northside KinderCare	0.24mile Journey Childcare	0.66mile Big Oak Childcare Center	0.24mile Journey Childcare	0.30mile Sunny Ridge Childcare	0.30mile Sunny Ridge Childcare

15	<u>Library</u>	1.35mile Hawthorne Public Library	1.35mile Hawthorne Public Library	0.46mile Lakeview Library	1.10mile Meadowridge Library	1.35mile Hawthorne Public Library	1.10mile Meadowridge Library	0.90mile Hawthorne Public Library	0.90mile Hawthorne Public Library
16	<u>Bank</u>	0.45mile Madison Credit Union	0.45mile Madison Credit Union	0.63mile Associated Bank	0.12mile BMO Bank	0.45mile Madison Credit Union	0.12mile BMO Bank	0.60mile Dane County Credit Union	0.60mile Dane County Credit Union
17	<u>Community Center</u>	0.60mile Wilmar Neighborhood Center	0.60mile Wilmar Neighborhood Center	0.12mile Warner Neighborhood Center	0.50mile Madinah Community Center	0.60mile Wilmar Neighborhood Center	0.50mile Madinah Community Center	0.80mile East Madison Community Center	0.80mile East Madison Community Center
18	<u>Jobs for Low Income & Travel Time</u>	0.40mile Willy Street Co-op	0.40mile Willy Street Co-op	0.45mile Northside Town Center	0.50mile Home Depot	0.40mile Willy Street Co-op	0.50mile Home Depot	0.98mile Madison East Shopping Mall	0.98mile Madison East Shopping Mall

	<u>Site 17</u>	<u>Site 18</u>	<u>Site 19</u>	<u>Site 20</u>	<u>Site 21</u>	<u>Site 22</u>	<u>Site 23</u>
	<u>132 Ponwood Cir.</u>	<u>3004 Maple Valley</u>	<u>3425 Marcy Rd</u>	<u>2016 Cameron Dr.</u>	<u>1217 MacArthur Rd</u>	<u>805 Troy Dr.</u>	<u>2426 Independence Lane</u>
1	<u>Bus Stop</u> 0.09mile Sawmill & Gammon Bus 15 Weekday This is a major intersection Frequency is 30min	0.12mile Maple Grove & Chester Bus 59 Weekend & Holiday This is a major intersection Frequency is 30min	0.16mile Troy & School Bus 22 7 days/week & Holiday Major intersection stop is Northport & Sherman Frequency is 15min	0.15mile Raymond & Cameron Bus 50, 51 7 days/week & Holiday Major intersection stop is Whitney & Raymond Frequency is 30min	0.08mile Mendota & Sycamore Bus 6 7 days/week & Holiday This is a major intersection Frequency is 30min	0.02mile Troy & School Bus 22 7 days/week & Holiday Major intersection stop is Northport & Sherman Frequency is 15min	0.08mile Melody & Independence Bus 6 7 days/week & Holiday Major intersection stop is Hwy 51 & 151 Frequency is 30min
2	<u>Social Services</u> 0.50mile Harvest of Hope	1.30mile Evening on Wheels	0.68mile Dane County Foster Care Program	0.77mile Multicultural Center	0.84mile Community Action Coalition	0.68mile Dane County Foster Care Program	0.56mile Community Action Coalition
3	<u>Recreational Park or Trail (Biking or Hiking)</u> 0.14mile Woodland Park	0.25mile Maple Park	0.20mile Lerdahl Park	0.06mile Meadowood Park	0.48mile Mayfair Park	0.20mile Lerdahl Park	0.54mile Reindahl Park
4	<u>Commercial or Retail</u> 0.90mile Mid Town Square Mall	0.89mile Target	1.33mile Walgreens	0.26mile Meadowood Mall	0.27mile Walmart	1.33mile Walgreens	0.39mile East Towne Mall
5	<u>Clinic</u> 0.95mile Dean Clinic	0.47mile SSM Health	1.62mile UW Health	1.40mile Meriter Health	0.72mile First Care	1.62mile UW Health	0.95mile Women's Health Center
6	<u>Pharmacy</u> 0.95mile SSM Health Pharmacy	0.47mile SSM Health Pharmacy	1.33mile Walgreens Pharmacy	1.40mile Meriter Health	0.27mile Walmart Pharmacy	1.33mile Walgreens Pharmacy	0.85mile CVS Pharmacy
7	<u>Municipal Facility (e.g. police, fire, city offices)</u> 1.26mile Fire Station	0.98mile Fire Station	0.97mile Fire Station	0.77mile Fire Station	0.85mile Fire Station	0.97mile Fire Station	0.80mile Fire Station
8	<u>Other Services (e.g. Senior Center)</u> 0.09mile Brookdale Assisted Living	0.91mile Quarry Senior Center	1.40mile Aging & Disability Resource Center	0.03mile NewBridge Senior Center	0.20mile Madison Pointe Senior Center	1.40mile Aging & Disability Resource Center	0.35mile Senior Helpers
9	<u>Grocery Store</u> 1mile Willy Street Co-op	0.34mile Pick 'n Save	1.36mile Willy Street Co-op	0.98mile Aldi Grocery	0.27mile Walmart Grocery	1.36mile Willy Street Co-op	0.85mile Aldi Grocery
10	<u>Elementary School</u> 0.95mile Muir Elementary	0.65mile Chavez Elementary	0.24mile Mendota Elementary	0.45mile Huegel Elementary	0.98mile Hawthorne Elementary	0.24mile Mendota Elementary	0.35mile Sandburg Elementary
11	<u>Middle School</u> 1.12mile Jefferson Middle School	1.50mile Toki Middle School	1.17mile Blackhawk Middle School	0.75mile Toki Middle School	1.30mile Whitehorse Middle School	1.17mile Blackhawk Middle School	2.95mile Blackhawk Middle School
12	<u>High School</u> 1.12mile Memorial High School	3.28mile Memorial High School	2.4mile Shabazz High	2.85mile Memorial High School	2.40 East High School	2.4mile Shabazz High	2.70mile Shabazz High School
13	<u>Job Training, Community College, Continuing Education</u> 1.33mile Madison College West	2.98mile UW College Courses	1.73mile Lakeland University	1.96mile UW College Courses	1.60mile MATC	1.73mile Lakeland University	1.35mile MATC
14	<u>Childcare</u> 0.53mile Old Sauk KinderCare	0.11mile Wonderland Day Care	0.32mile Jamie Jungle Childcare	0.45mile New Era	0.98mile Kid's Crossing Childcare	0.32mile Jamie Jungle Childcare	0.50mile Mami Family Care

15	<u>Library</u>	0.90mile Alicia Public Library	1.39mile Meadowridge Library	1.38mile Lakeview Library	0.26mile Meadowridge Library	1.75mile Pinney Library	1.38mile Lakeview Library	2.60mile Lakeview Library
16	<u>Bank</u>	1mile Chase Bank	0.26mile Associated Bank	0.81mile UW Credit Union	0.26mile Old National Bank	0.50mile UW Credit Union	0.81mile UW Credit Union	0.30mile Old National Bank
17	<u>Community Center</u>	1mile Lussier Community Center	1.55mile Elver Neighborhood Center	0.12mile Vera Court Neighborhood Center	0.65mile Terrace Neighborhood Center	0.98mile Community Groundworks	0.12mile Vera Court Neighborhood Center	1.30mile East Community Center
18	<u>Jobs for Low Income & Travel Time</u>	0.90mile Mid Town Square Mall	0.34mile Pick 'n Save	1.40mile Northside Town Center	0.26mile Meadowood Mall	0.27mile Walmart	1.40mile Northside Town Center	0.39mile East Towne Mall

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

The purpose of the Tenant Selection Plan is to specify policies and procedures for tenant selection at Movin' Out Housing Initiatives Scattered Sites ("MIHISS") and to ensure that tenants are selected for occupancy in accordance with HUD requirements and all applicable civil rights and Fair Housing laws.

MIHISS will review this Tenant Selection Plan at least annually to ensure that it continues to reflect current operating practices, program priorities, and HUD requirements. A copy of this plan will be made available to the public upon request.

Please see Appendices for important information:

- Appendix A for MIHISS' unit mix and income criteria.
- Appendix B for 's Equal Access Statement in compliance with Section 504 of the Rehabilitation Act of 1973.
- Appendix C for 's Statement of Non-Discrimination under the Fair Housing and Equal Opportunity Act
- Appendix D for 's policy on Reasonable Accommodations
- Appendix E for Violence Against Women and Justice Department Reauthorization Act of 2005
- Appendix F for information about the EIV system (used for verification of employment and income data)
- Appendix G for Definitions of terms used in the Tenant Selection Plan
- Appendix H for Dog Breeds that Prohibited at MIHISS

1. Application Procedures

Properties will be managed by Wisconsin Management Company. All applicants must submit a standard application with all required income, asset and disability documentation. Every application must be completed in its entirety (all members of the household shall be listed on the application form), and signed and dated by the head of the household, spouse, co-head(s), and all household members 18 years and older. *Applications that are incomplete and/or have not been signed and dated as required will not be processed.*

Staff will assist any applicant who might have trouble completing the application form. This assistance may take the form of answering questions about the application, helping applicants who may have literacy, vision or language problems and, in general, making it possible for all interested parties to apply for housing.

The property management company will be the final judge of what constitutes adequate and credible documentation. If there is any doubt about the truthfulness or reliability of information received, alternative methods will be pursued until it is satisfied that the documentation obtained is the best available.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

An applicant's failure to respond to requests for information may result in withdrawal of an application from further consideration. If failure to respond is due to an applicant's disability, a reasonable accommodation will be made.

Application Screening Criteria

Applications will be accepted and processed in accordance with the Application Screening Criteria. Information collected through the application screening process will be verified by the property manager.

Collecting and verifying information will assist us to make informed, objective, fair, and consistent decisions about which applicants are approved for tenancy. *These criteria will be applied in a non-discriminatory fashion according to all applicable fair housing and civil rights laws.*

- a. Social security numbers (SSN): Applicants must submit a photocopy of all household members' social security cards prior to move-in. Any applicant or resident who used an acceptable temporary source document must bring in a copy of the actual SSN card upon receipt.
- b. Citizenship: Proof of US citizenship is needed only for units that have a project-based voucher attached.
- c. Ability to Pay: Although there are no minimum income requirements, applicants must provide documentation of ability to pay the monthly rent and utilities OR availability of a guarantor who completes the application and signs all the required paperwork prior to the applicant moving into the unit.
- d. Rental History: Inquiry will be made into current and past rental history including nonpayment of rent, failure to cooperate with recertification procedures; violations of house rules; violations of the lease; history of disruptive behavior; and any previous evictions. **Applicants shall not be rejected on the basis of:**
 - A lack of housing history;
 - Owning money to a prior landlord or negative rent payment history If the tenant's housing and utility costs were more than 50% of their monthly income;
 - Owning money to a prior landlord or negative rent or utility payment history if the applicant does one of the following:
 - 1) establishes a regular record of repayment of the obligation;
 - 2) signs up for automatic payment of rent to the housing provider; or
 - 3) obtains a representative payee.
- e. Credit checks will be completed for all applicants 18 years of age or older to determine how well they meet their financial obligations. Alternative programs designed to assist applicants with fiscal responsibility may be accepted in lieu of meeting credit criteria.
 - A lack of a credit history, as opposed to a poor credit history, will not be used to reject an application.
 - Information on an applicant's credit report that is disputed, in repayment, or unrelated to housing or utility (gas, electric, and water only) payments will not be used to reject an application.
 - Inability to meet financial obligations other than housing and utilities shall not be used to reject an applicant.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

f. Criminal History: Criminal background checks will be processed on all applicants. Applicants who have been convicted of any of the following charges within the last two years will not be approved for tenancy:

- Damage to property or vandalism.
- Violent criminal activity as defined in 24 C.F.R § 5.100 (any criminal activity that has as one of its elements the use, attempted use, or threatened use of physical force substantial enough to cause, or be reasonably likely to cause, serious bodily injury or property damage).
- Use, possession, manufacturing or distribution of a controlled substance unless prescribed by a physician.
- Any applicant whose name appears on a sex-offender registry in any state will not be approved for tenancy, regardless of when the offense occurred.

The property manager may consider extenuating/mitigating circumstances in evaluating information obtained during the screening process to assist in determining the acceptability of an applicant, especially to take into account circumstances beyond the applicant's control; i.e., medical emergencies or extreme weather conditions.

The following materials will be kept on file for at least three years: application, initial rejection notice, any applicant reply, owner's final response, and all interview and verified information on which the owner based the rejection.

Rejection of Applications

MIHISS has the right to reject applicants who do not meet one or more of the Applicant Screening Criteria discussed in Section 2 above. In addition, an applicant may be rejected for any of the following reasons:

- a. Applicant has household characteristics that are not appropriate for the specific type or size of the unit available at the time.
- b. Applicant fails to disclose and document all Social Security Numbers or execute a certification when numbers have not been assigned.
- c. Purposeful falsification, misrepresentation or withholding of information or submission of inaccurate and/or incomplete information on the application or during the review process.
- d. Applicant household includes a member who has been evicted from a federally assisted site for drug related criminal activity per the Application Screening Criteria above.
- e. Applicant is determined ineligible according to the HUD Student Eligibility Requirements (Section 327(a) of Title III of Public Law 109-115 (119 Stat.2936) and 24 CFR 5.612).
- f. An applicant fails to document their eligible immigration status by submitting an acceptable document recognized by the Federal government.

Prior to a denial based on a criminal record, the applicant shall have access to a copy of the criminal record at least five days prior to an in-person appeal meeting (if scheduled) and an opportunity to dispute the accuracy and relevance of the report.

Prior to a denial based on a criminal record, the applicant shall have the opportunity to exclude the culpable family member(s) as a condition of admission of the remaining family members.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

All rejected applicants will be promptly notified in writing. Denial notices shall include the following:

1. The reason for denial with details sufficient for the applicant to prepare a defense, including:
 - The action or inaction forming the basis for the denial,
 - Who participated in the action or inaction,
 - When the action or inaction was committed, and
 - The source(s) of information relied upon for the action or inaction.

2. Notice of the applicant's right to the following:
 - A copy of their application file, which shall include all evidence upon which the denial decision was based.
 - Copies of the property manager's screening criteria
 - To request an in-person appeal meeting on the denial decision by making a written request for a hearing within 45 days. The housing provider is not required to hold the unit open while the appeal is pending.
 - To have an advocate present at the in-person appeal meeting and the right to be represented by an attorney or other representative.
 - To present evidence in support of their application, including, but not limited to, evidence related to the applicant's completion or participation in a rehabilitation program, behavioral health treatment, or other supportive services.

If the applicant requests an in-person appeal meeting:

- The hearing will be conducted by a person who was not involved in or consulted in making the decision to deny the application nor a subordinate of such a person so involved.
- The in-person appeal meeting shall be scheduled within ten working days of the request, unless the applicant requests a later date.
- A written decision on the application shall be provided to the applicant within ten working days after the in-person appeal meeting.

Supportive Housing Units

will hold a second interview with any applicant known to have a disability who cannot meet one or more of the tenant screening criteria. The purpose of this interview is to determine whether it is possible to admit the applicant through consideration of mitigating circumstances or by applying reasonable accommodation. Mitigating circumstances are facts that could overcome or outweigh information gathered in the tenant screening process. Such facts must be verified.

Assigning Units Designed for People with Disabilities

- a) Units with design features for people with disabilities: will first offer rental units with special accessibility features to households that include persons with disabilities who require such features. Such determinations will be made based on the information provided by the applicant on his/her application.
- b) Households with a member who needs the accessibility features of a particular unit take priority to occupy accessible units over households with no members who need those specific accessibility features.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

Security Deposits

- a) A security deposit will be collected from all tenants as follows:
- i. Security deposit is equal to one month's rent and is due with the signed lease. The amount of security deposits will not change if the rent amount changes.
 - ii. Security deposits will be collected at the time of initial lease execution. Security deposits may be paid on an installment basis if the tenant is unable to pay the full amount at move-in AND inquires if installments are available.
 - iii. All security deposits will be deposited into a segregated account and a record of the amount in the account attributable to each tenant will be maintained.
- b) Within 21 days after a tenant moves out, the property manager will either:
- i. Refund the full amount of the original security deposit; or
 - ii. Provide the tenant with an itemized list of any unpaid rent, damages to the unit and estimated cost of repairs, and a check for any unused balance.
 - iii. In order to receive a full or partial refund of his/her security deposit, the tenant must provide to his or her new mailing address, or arrange to pick up the refund.

Occupancy Standards

Minimum occupancy standards are as follows:

1 bedroom units	1 – 2 persons
2 bedroom units	2 – 4 persons
3 bedroom units	3 – 6 persons

The occupancy standards are intended to assist as many people as possible without overcrowding while minimizing vacancies. Infants and children age 2 and under will not be counted as persons for the purposes of occupancy standards.

Waiting List

The Waiting List documents the number of qualified persons and the order in which the applicants will be contacted when a vacancy occurs. ONLY QUALIFIED APPLICANTS will be placed on the Waiting List, so a fully completed application is essential to ensure that applicants meet preliminary eligibility criteria. Upon completion of the preliminary eligibility determination, the applicant will be informed of their placement on the waiting list.

Pet Policy and Pet Security Deposit

If applicant's household includes a pet, the following rules apply:

- Tenants must pay a pet fee of \$20 per pet, per month.
- Dog, cat, bird, reptile, fish only.
- Birds, fish, and reptiles must be kept in a cage or aquarium.
- The tenant must provide a sanitary indoor litter box for cats.
- Proof of rabies vaccination and pet registration as required by law must be submitted with application.
- Size Limit: No pet may exceed thirty-five (35) pounds in weight.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

- Number limit: No tenant household may have more than two pets at any time.
- Breed Restrictions: Some dog breeds are not allowed at MIHISS. Please see Addendum

Annual and Interim Recertification

a. Annual Recertification: To ensure that assisted tenants pay rents commensurate with their ability to pay, will conduct an annual recertification of family income, assets, allowances and composition. The resident(s) will receive a notice about 120 days in advance of their annual renewal date. The resident(s) must supply all required information requested by. The information is then third-party verified and a new tenant rent amount is calculated in accordance with all HUD requirements.

b. Interim Recertification: All tenants must notify within ten business days if any of the following occurs:

- A family member moves out of the unit
- The family proposes to move a new family member into the unit
- An adult member of the family who was reported as unemployed on the most recent certification or recertification becomes employed, or the family's income cumulatively increases by \$200 or more per month.

Tenants may request an interim recertification if any of the following occurs:

- Any decreases in income including but not limited to, loss of employment, less hours worked, loss of government assistance or any other type of income source.
- Any increase in allowances including but not limited to, increased medical out of pocket expenditures, or higher child care costs, or
- Any other changes which could affect the calculation of a family's adjusted income, which could include but is not limited to, a family member turning 62 years old, a family member becoming a full-time student, or a family member becoming a person with a disability.

Each unit will be inspected on an annual basis at the time of the tenant's lease renewal. Notice of lease renewal and inspection will be provided to tenants as per HUD regulations.

Late Rent Policy

a. All rent payments are due and payable on the first of each month. If the rent is paid after the fifth day of any month, a 5% late fee will be assessed, unless the tenant has made prior arrangements with the property manager.

b. If a tenant fails to pay rent for a total of two consecutive months, may exercise its right to initiate eviction proceedings by serving the tenant with an Eviction Notice.

c. In the event a rent check is returned by the bank for any reason:

- Returned checks must be covered with a certified check or money order.
- A \$50.00 NSF fee will be assessed.
- If a tenant has two checks returned during a 12-month period, personal checks or ACH will no longer be accepted and rent must be paid by cashier's check or money order.

Privacy and Confidentiality Policy

Tenant Selection Plan
Movin' Out Housing Initiatives Scattered Sites

Our policy is to protect the privacy of individuals covered by the Federal Privacy Act of 1974, and to ensure that the protection of such individuals' verification records is maintained by the property.

This information may be released to appropriate federal, state and local agencies, when relevant, and to civil, criminal or regulatory investigators and prosecutors. However, the information will not be otherwise disclosed or released unless the individual gives written authorization to do so.

This privacy policy in no way limits 's ability to collect such information as it may need to determine eligibility, compute rent or determine an applicant's suitability for tenancy. Consistent with the intent of Section 504 of the Rehabilitation Act of 1973, any information obtained on disability status will be treated in a confidential manner.

Additional Criteria

Additional criteria established by applicable state and local ordinance(s) are considered part of this policy.

Sign below to confirm your receipt and understanding of the above criteria.

I (WE) HAVE READ THE ABOVE AND UNDERSTAND THE CRITERIA ON WHICH MY (OUR) APPLICATION WILL BE APPROVED OR DENIED.

Applicant Signature

Date

Guardian or Other Applicant's Signature

Date

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

APPENDIX B

Section 504 Equal Access Statement

For mobility impaired persons

Wisconsin Management Company (), which is an accessible facility on an accessible route. This document is available for examination Monday through Thursday between the hours of 8:00 am and 4:00 pm and Friday between 8:00 am and noon. You must make advance arrangements to examine this document. Please call or call our Relay # 1-800-346-8581 to schedule an appointment.

For hearing impaired persons

provides assistance for hearing-impaired persons in reviewing this document. Assistance may include provision of a qualified interpreter at a time convenient to both and the individual with disabilities. Please call our Relay # 1-800-346-8581 to schedule an appointment.

For vision impaired persons

will provide a staff person to assist a vision-impaired person in reviewing this document. Assistance may include describing the contents of the document, reading the document or sections of the document or providing such other assistance to permit the contents of the document to be communicated to the person with vision impairments.

Assistance to insure equal access to this document will be available in alternate formats and provided in a confidential manner and setting. An individual with disabilities is responsible for providing his/her own transportation to and from the location where this document is kept either by advocacy groups, social workers, family members or personal friends. The applicant should inform if additional assistance is needed to complete forms or understand program requirements, procedures, house rules, etc. Assistance may be provided by advocacy groups, social workers, family members or personal Mentors. If an individual with disabilities is involved, all hearings or meetings required by this document will be conducted at an accessible location with appropriate assistance provided.

APPENDIX C

FAIR HOUSING AND EQUAL OPPORTUNITY REQUIREMENTS

Statements of NON-DISCRIMINATION

It is the policy of to comply fully with Title VI of the Civil Rights Act of 1964, 42 U.S.C.A. 2000d, The Federal Fair Housing Act, Executive Order 11063, Section 504 of the Rehabilitation Act of 1973, 29 U.S.C.A. 794 et seq., the Age Discrimination Act of 1975, 42 U.S.C.A. "6101-6107", The Fair Housing Amendments Act of 1988, 42 U.S.C.A. "3601-3620", The Americans with Disabilities Act of 1990, 42 U.S.C.A. "12101-12213", and any state and local legislation protecting the individual rights of residents, applicants or staff which may subsequently be enacted.

Under Federal Law it is illegal to discriminate against any person or group of persons because of race, color, religion, sex, disability, familial status, national origin, real or perceived sexual

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

orientations and gender identity. In addition, owners must comply with local fair housing and civil rights laws.

Shall not:

- Deny to any family the opportunity to apply for housing, nor deny to any eligible applicant the opportunity to lease housing suitable to its needs;
- Provide housing which is different than that which is provided to others;
- Subject a person to segregation or unequal or different treatment;
- Restrict a person's access to any benefit enjoyed by others in connection with the housing program;
- Treat a person differently in determining eligibility or other requirements for admission;
- Deny a person access to the same level of services; or
- Deny a person the opportunity to participate in a planning or advisory group which is an integral part of the housing program.
- Deny any applicant based on their membership in a class protected by Dane County fair housing ordinances and non-discrimination ordinances in Madison.

APPENDIX D

Reasonable Accommodation

It is the policy of to consider all requests of individuals with a disability for "reasonable accommodation" both in policies and procedures, as well as modification of units or premises that assist in providing an equal opportunity to use and enjoy the programs under which we operate. So that such requests can be expeditiously processed and given prompt consideration. It is the policy of to require that all requests for reasonable accommodation due to a disability be submitted in writing. Employees will assist in the process of putting such requests in writing when requested to do so by a person making a request.

will verify that the household making a request for reasonable accommodation due to a disability includes an individual with disabilities as defined by federal law.

shall not automatically deny admission to a particular group or category of otherwise eligible applicants; e.g.: single head of households with children, elderly pet owners, or families whose head or spouse is a student. Each applicant in a particular group or category will be treated on an individual basis in the normal processing routine.

will seek to identify and eliminate situations or procedures, which create a barrier to equal housing opportunity for all. In accordance with Section 504, will make reasonable physical or procedural changes to permit individuals with disabilities to have full advantage of the housing program. Such accommodations may include changes in the method of administering policies, procedures, or services.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

In addition, may perform reasonable structural modifications to housing and non-housing facilities where such modifications would be necessary to afford full access to the housing program for qualified individuals with disabilities.

In reaching a reasonable accommodation with, or performing structural modifications for, otherwise qualified individuals with disabilities, is not required to:

- Make structural iterations that require the removal or altering of a load-bearing structural member;
- Provide an elevator in any multi-family housing development solely for the purpose of locating accessible units above or below the grade level;
- Provide support services that are not already part of its housing programs;
- Take any action that would result in a fundamental alteration in the nature of the program or service
- Take any action that would result in an undue financial and administrative burden on the property.

APPENDIX E

Violence Against Women Reauthorization Act of 2013

The Violence Against Women and Justice Department Reauthorization Act of 2013 protects qualified tenants and family members of tenants who are victims of domestic violence, dating violence or stalking (collectively “Domestic Violence”) from being evicted or terminated from housing assistance based on acts of such violence against them. These protections include:

- A. The Landlord may not consider incidents of domestic violence, dating violence, sexual assault or stalking as serious or repeated violations of the lease or other “good cause” for termination of assistance, tenancy or occupancy rights of the victim of abuse.
- B. The Tenant may terminate this Lease without penalty if the City of Madison (“Grantee”) determines that the Tenant has met the conditions for an emergency transfer under 24 CFR Part 5.2005(e). This will be evidenced, in part, through the Certification of Domestic Violence, Dating Violence, Sexual Assault, or Stalking, and Alternate Documentation (HUD Form 5382) and Emergency Transfer Request for Certain Victims of Domestic Violence, Dating Violence, Sexual Assault, or Stalking (HUD Form 5383) forms.
- C. The Landlord may bifurcate the Lease, or remove a house member from this Lease in order to evict, remove, terminate occupancy rights, or terminate assistance to such member who engages in criminal activity directly relating to domestic violence, dating violence, sexual assault, or stalking against an affiliated individual or other individual without regard to whether the household member is a signatory to the lease and without evicting, removing, or terminating assistance to a victim of such criminal activity who is also a tenant or lawful occupant. The Landlord and property owner may choose to bifurcate the lease at their discretion. The Landlord’s refusal to bifurcate the Lease does not restrict the Tenant’s ability to terminate this Lease if the Tenant has met the conditions for an emergency transfer.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

D. The Landlord may not consider criminal activity directly relating to abuse, engaged in by a member of a tenant's household or any guest or other person under the tenant's control, cause for termination of assistance, tenancy, or occupancy rights if the tenant or an affiliated individual of the tenant is the victim or threatened victim of that abuse.

E. The Landlord may request in writing that the victim or an affiliated individual of the tenant certify that the individual is a victim of abuse and that the tenant complete and submit documentation of abuse, using the Certification of Domestic Violence, Dating Violence, Sexual Assault or Stalking (HUD Form 5382), or other documentation as noted on the certification form, to receive protection under the VAWA. Failure to provide the documentation within 14 business days of request, or an agreed upon extension date, may result in eviction.

F. Any information submitted to the Landlord will be kept confidential and will not be disclosed to any other individual or entity except if disclosure is consented to by the victim, is required for an eviction or is otherwise required by law.

APPENDIX F

EIV (Enterprise Income Verification)

EIV is a computer system containing employment and income information on individuals participating in HUD's Section 8 program. This information assists HUD in making sure "the right benefits go to the right persons". EIV gets its information from the Social Security Administration, The Department of Health and Human Services (HSS), and The National Directory of New Hires (NDHN).

EIV allows Wisconsin Management Company, Inc. to use the information provided to determine if tenants:

- Failed to report or under reported their income
- Used a false social security number
- Receive rental assistance at another property
- Began any new employment
- Show a historical pattern of earnings and income received

EIV will also allow to check additional reports. These include:

1. Multiple subsidy report for household members. This report shows whether or not a tenant is being assisted at another location.
2. Deceased tenant report. This report identifies tenants who are participating in one of HUD's rental assistance programs who had been reported by the SSA as being deceased.
3. Existing tenant report. This report will be used by at time of application to identify any applicants who are currently residing at another assisted housing property. This report gives the ability to coordinate the move-out and move-in dates with the other property to insure the issue of double subsidy doesn't arise.
4. Identity verification report statistics. This report shows a number of items, including any members who failed to pass the EIV pre-screening, or the SSA identity test.

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

Appendix G – Definitions of Terms Used in Tenant Selection Plan

Household

A household consists of one or more persons who live in a residential unit and whose income and resources are available to meet the household's needs. If one person moves out of the unit, a remaining family member(s) is any person(s), except a live-in aide or foster child, who remains in the unit and is considered a member of the household on the most recent recertification form or lease.

To qualify as a remaining family member, the person(s) must:

- a. Be a member of the original tenant household or have become a member of the tenant household subsequent to move-in with written approval of, and remained in continuous occupancy up to and including the time the original tenant of record vacates, and be of legal age;
- b. Be listed on the current lease; and
- c. Have his/her income included in the household's annual income for determining rent.

Elderly Household

An elderly household consists of either a single person or family where the head, spouse, or co-head is at least 62 years old or disabled. The household may be two or more elderly or disabled persons who are living together, or one or more such persons living with someone essential to their care or well-being; i.e., "a live-in aide/attendant".

Disabled

A disabled person is a person who:

- a. Has a disability, as defined in 42 U.S.C. 423;
- b. Is unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment which can be expected to result in death or which has lasted or can be expected to last for a continuous period of not less than 12 months; or
- c. Is determined, to have a physical, mental, or emotional impairment that:
 1. Is expected to be long-continued and indefinite duration,
 2. Substantially impedes his or her ability to live independently, and
 3. Is of such a nature that the ability to live independently could be improved by more suitable housing conditions; or
- d. Has a developmental disability, as defined in Section 102(7) of the Developmental Disabilities Assistance and Bill of Rights Act (42 U.S.C. 6001 (8)), i.e., a person with a severe chronic disability that:
 1. Is attributable to a mental or physical impairment or combination of mental and physical impairments
 2. Is manifested before the person attains age 22
 3. Is likely to continue indefinitely
- e. Results in substantial functional limitation in three or more of the following areas of major life activity:

Tenant Selection Plan

Movin' Out Housing Initiatives Scattered Sites

- Self-care,
- Receptive and expressive language,
- Learning,
- Mobility,
- Self-direction,
- Capacity for independent living, and
- Economic self-sufficiency; and
- Reflects the person's need for a combination and sequence of special,
 - interdisciplinary, or generic care, treatment, or other services that are of
 - lifelong or extended duration and are individually planned and coordinated.
- f. Does not exclude persons who have the disease of acquired immunodeficiency syndrome or any conditions arising from the etiologic agent for acquired immunodeficiency syndrome;
- g. For purposes of qualifying for low-income housing, does not include a person whose disability is based solely on any drug or alcohol dependence; and
- h. Means person with disabilities (individual with disabilities), as defined in 24 CFR 8.3, for purposes of reasonable accommodation and program accessibility for persons with disabilities.

Appendix H – Prohibited Dog Breeds

Please see attached for Dog Breeds that are prohibited at MIHISS

Movin' Out & Housing Initiatives Services Plan

Brief Project Description

This project will provide 79 units of supported housing. All 79 units are set aside for people with disabilities. The 60 units owned by Housing Initiatives' are for people experiencing homelessness.

Qualified households include households with one or more family members with a disability and will be served by My Choice – Long Term Adult Care System, the Dane County Children's Long-Term Support System, the Dane County Mental Health Service System, and the Dane County Veterans Service Office.

There is a wide array of services available under each of these systems. Each of these service providing systems has long and extensive experience in their respective areas and provides support to several thousand people in Dane County each year.

With over 25 years of experience, Movin' Out has established working relationships with each of these systems to receive referrals for those seeking permanent housing that is linked with their supportive services as well as coordinating with these systems to help these residents to successfully maintain their housing. Also attached to the application are executed Memorandums of Understanding (MOUs) between Movin' Out, Housing Initiatives and agencies actively working in each of these systems. The supported housing units will be marketed on a first-come, first-served basis to qualified residents. It is important to note that in many cases the households seeking supported housing are often served by more than one of the systems.

Development Team Supportive Services Background

Housing Initiatives

Housing Initiatives, Inc (HI) has been providing supportive services to clients since the organization's inception, 28 years ago. Historically, the organization relied more on third party support organizations that provided services specific to each client's needs. Community support providers are still an integral component of services for many HI clients. However, starting in 2017 the organization greatly expanded its in-house service model. Utilizing new funding from HUD, the City of Madison, and Dane County, the agency now employs four full time employed case managers to work directly with clients. This change was concurrent to a commitment to take many more clients directly from the Priority List with Coordinated Entry, a more vulnerable selection of people who often present with greater needs. The role of HI supportive services staff is now a combination of direct service, coordination with other service providers, and arranging support networks around clients who are often unconnected from needed services.

Movin' Out Inc.

To support these integrated supported housing units, Movin' Out also directly staffs and operates a program called the Resident Service Coordination Program (RSC). RSC is designed to both help coordinate resident services as well as to create and strengthen connections between all residents in the development and the surrounding community. The goals of this program are to help the residents in all of our rental housing be successful as tenants and as full citizens. Specifically, the RSC staff establishes personal connections with the residents in our rental communities and assists in ensuring that they are connected to the larger community and, if desired, supportive services. Additionally, this program coordinates and provides a range of empowerment educational services such as financial literacy, assistance with income tax preparation, home ownership education and other informational sessions aimed at improving life skills. These services will be funded, in part, by the project through cash flow and, in part, with earned income from Movin' Out's other program activities and are provided on site or other convenient locations as needed.

Movin' Out's approach to integrated supported housing is to provide our residents with ready access to a wide range of coordinated support service systems they may need. Through our experience in operating integrated supported housing we have come to understand that people often need individualized support with access to a wide range of services. Sometimes those service needs overlap different service systems and often people's service needs change over time.

The supportive service descriptions below provide information regarding each of the third-party service systems we obtained an MOU from and the key service providers that Movin' Out and Housing Initiatives actively works with. The array of services systems described below are often complex to navigate, each with their own rules and regulations, each administered in different ways by different levels of government. Often these systems are not well connected or coordinated with each other, nor integrated with needed housing resources. Movin' Out's Resident Service Coordination Program addresses issues that may arise as a result of this lack of coordination and to help residents achieve long term successful tenancy.

Here is the Movin' Out's holistic resident first model.



Below is a description of the primary support systems that Movin' Out will partner with for this project, and how we will work together to ensure best outcomes possible for our residents.

Partnerships (MOU Obtained)

- A. My Choice - Adult LT Care System: This system provides individually tailored services to people with physical and/or developmental disabilities and frail elderly people. These services are paid for through Medicaid funds and, in Wisconsin, are administered by a network of regional managed care organizations under a program called Family Care. The Managed Care Organizations (MCO's) contract with a range of direct care service providers who together provide highly individualized services that are delivered both in their homes and in the community as needed. Services are available on a regularly scheduled basis and are funded by each individual's Medicaid funds. These services include:

- helping to maintain good nutrition, hygiene and health;
- managing budgets and bill paying;
- establishing a domestic routine;
- establishing a safe environment and safe practices;
- providing quick response to emergencies;
- helping to maintain good relationships with housemates, neighbors, resident association members, friends, co-workers, and family members;
- monitoring and dispensing medication;
- assisting in securing employment including supported employment in the community;
- assisting in using public transportation;
- providing assistance with exercising responsibility, making choices, and providing direction and decision-making;
- assisting with developing and implementing a service plan that reflects one's own needs and preferences.

Movin' Out has a Memorandum of Understanding with My Choice Wisconsin, one of the state authorized Family Care MCO's, who will provide referrals of prospective residents to the project and commits to providing the services listed above through its network of direct care service providers. Our primary contact is Betsy VanHeesh, Chief Operations Officer. Additional information describing the services offered by My Choice is included with the attached MOU (Exhibit 7a) between Movin' Out and My Choice.

- B. Children's LT Care System: The Children's Long-Term Support (CLTS) Program is a [Home and Community-Based Service \(HCBS\)](#) program that provides Medicaid funding for children who have substantial limitations in their daily activities and need support to remain in their home or community. Eligible children include those with developmental disabilities, severe emotional disturbances, and physical disabilities. Funding can be used to support a range of different services based on an assessment of the needs of the child and his or her family. Examples of these services are respite services for primary caregivers (parents); case management; home modifications and supportive home care. Movin' Out works with families who have children with disabilities and are supported by this system. In many cases, families in this situation are supported to assist one another through peer support efforts. Having access to stable and affordable housing in proximity to employment and services is an important factor in assisting these families to support and nurture their children. In Dane County, these services are administered by the Dane County Department of Human Services. These services are provided both in people's homes or in the community depending on the nature of the service. Movin' Out has a Memorandum of Understanding (Exhibit 7b) with Dane County who will provide referrals of prospective residents to the project and commits to providing the services listed above through its network of direct care service providers. Our primary contact with the Dane County CLTS program is Monica Bear.

- C. Mental Health Services: In Dane County, mental health services are provided by the Dane County Department of Human Services and are provided for both adults and children. These services are paid for through a combination of Federal Medicaid, State and County funding. The services offered are provided both in people's homes and in the community depending on the type of service and the needs of the individual. There are an array of community support and case management services provided to help people with mental illnesses thrive in a community setting. There are two primary Mental Health programs offered by Dane County.

One way these supports are provided is through the Community Support Program, or CSP. CSP is a coordinated care and treatment program which provides a range of treatment, rehabilitation, and support services through an identified treatment program and staff to ensure ongoing therapeutic involvement, individualized treatment, rehabilitation, and support services. They provide comprehensive services and staff outreach to people living in the community. Almost all of the services (medications, case management, work services, counseling, activities of daily living, ongoing problem solving, etc.) are provided through interdisciplinary teams within these programs. All people being considered for treatment in these programs must have a serious and persistent mental illness.

The second primary service delivery program is called the Comprehensive Community Services Program (CCS). This program provides case management and what the County calls an "open provider network". This means that the client, together with their case manager, determines the type and source of services they will receive from an array of different contracted providers. In addition to these primary service delivery systems, the Dane County Mental Health System offers a number of other programs through various contracts with other community based providers that supplement the support service needs for the County. Included with the attached MOU is a Mental Health System chart that lists the full range of services offered.

Movin' Out has a Memorandum of Understanding (Exhibit 7c) with Dane County Department of Human Services who will provide referrals of prospective residents to and commits to providing the services listed above through its network of direct care service providers. Our primary contacts at Dane County Mental Health are Julie Meister and Carrie Simon.

- D. Veteran Services: The Dane County Veterans Service Office (VSO) is the point of contact in Dane County for veterans seeking various services. Their mission is to assist veterans and their families with obtaining local, state and federal benefits. Assistance includes identifying the benefits to which they are entitled and assisting them with the application process. The VSO provides access to a range of benefits that include veteran specific counseling,

assistance with paying for housing costs and medical care. These services are primarily provided off-site at various locations depending on the nature of the service.

Movin' Out is in the progress of obtaining a Memorandum of Understanding with the Dane County Veterans Service Office who will provide referrals of prospective residents to the project and provide veterans with access to a wide range of veteran specific services through a variety of veteran benefit programs. Dan Connery is our primary contact person at the Dane County Veterans' Service Office.

- E. Homeless Services: In Dane County, homeless services are coordinated through the Homeless Services Consortium of Dane County which is a partnership of agencies, funders, advocates, and formerly homeless persons committed to preventing and ending homelessness. This system provides a wide array of services to assist families and individuals experiencing homelessness to address their housing and service needs. Many of these service providing agencies also coordinate with the service systems described above. Some of them also own and operate housing themselves while others assist people to access housing in the community. Several of these providers focus on specific household types such as families with children, single men or single women. The services they provide include case management and coordination with a range of other services providers. Their services are provided on site or at easily accessible community locations. For the Scattered Site project Housing Initiatives will provide services for homeless residents. Movin' Out and Housing Initiatives have mission alignment in that both groups have programs that focus on households with a family member that has a disability. Housing Initiatives has committed to working with Movin' Out on referral and supportive services for up to 30 units coming out of coordinated entry and an additional 30 units for those experiencing homelessness. These units are also covered by a rental subsidy. Our primary contact with The Road Home is Brad Hinkfuss.

Below is the scope of the services provided to tenants and what approaches the supportive services partner(s) will use to address the needs of the targeted tenant population.

The scope of services spans from fulfilling CCS facilitator and client goals and plans as CCS providers to assuring basic human needs are met. Our clients are from the top of the Housing First list, and have been chronically homeless as well as typically having a diagnosis of one or more profound mental illness(es). This population typically has very low or no income. Once the 30% of a client's income is subtracted for their portion of rent as HUD demands, the majority has very little to live off of. Many do not drive or have a vehicle. This means that client services spends time going out into the community or assisting drop-ins in making sure basic human needs for food, hygiene, medical care, mental health care, prescriptions, and transportation are met as able. Our approach is client-centered. Some goals brought up by clients like substance abuse treatment, job training, or obtaining further education are also addressed with the client as requested. Client services also work with third-party landlords who are often not equipped to respond to the unique needs of our clients and how they may present. In rare instances, client services may help activate a mental health crisis intervention plan and assist in alerting

professionals if protective custody or a hold evaluation may be appropriate for an individual or community's safety.

Where tenants can access services. For example, on-site at the development in a permanent, designated space, or by referral to off-site community supports with no on-site provider presence.

Housing Initiatives offers on site client services at 2502 Calypso Rd #2. There are four case managers, including one peer specialist and an emt, who are available Mon-Friday 8:00 – 5:00. These case managers travel out and into the community visiting residents who elect to participate in case management at a majority of our properties weekly, monthly or as needed.

Many of our residents participate in CCS, and have facilitators from other agencies that check in with them regularly and, in many instances our case managers provide service to complete planned activities and assist clients in meeting client driven goals and objectives. The fact that we are onsite is invaluable to both the clients and the CCS facilitators. Other agencies do provide services to a number of our client/units as they use us primarily as housing providers for the clients they have more difficulty housing in any other setting.

If services provided are referral to off-site community supports, please detail how tenants will receive, on supportive services that are available to them before and after needs arise.

Housing Initiatives refer clients to off-site community supports for services we cannot provide ourselves, for instance psychotherapy, medical services (physical, mental, dental), medicated assisted treatment programs, or 12-step meetings. Case Managers call or visit clients who are struggling with different issues (for instance addiction) and have asked in the past for help. During these visits, case managers will sometimes offer to take them to an AA or NA meeting, give them bus passes to be able to get to and from appointments or even schedule a taxi ride with them so they don't miss the opportunity to obtain the assistance they expressed interest in. If a client is not in touch for a period of time, calls will be made to client, e-mails sent if they have an e-mail address on file, and/or drop in visitation to get a chance to see and visually evaluate the client and their living conditions, and re-establish contact. For low or no income clients without access to transportation or without a support system, client services will make sure basic needs are met and will help with deliveries of food pantry food, supplies for hygiene and prescription drug pickup and delivery.

We also regularly check in on clients who have chronic and serious health or mental health conditions, very low or no income and no vehicle to make sure they have regular access to food- as many food pantries limit their deliveries to only once a month, we have a volunteer crew who will assist case managers with food deliveries weekly to assure they have adequate access to food, and we also maintain a wall of household supplies and an emergency shelf-stable food pantry in our client services office. As a condition of HUD, client services are provided on a voluntary basis, but we attempt to physically see as many clients as possible, by beginning to offer regular social gathering opportunities put on by the client services team

Client services staff has access to a monthly emergency funds to help clients with practical needs for clients with very low and no income available to them, while helping them either apply for SSI/SSDI or if appropriate, for opportunities for skill-development education, transportation/drivers education, job training or employment. Any and all opportunities that clients set as goals for themselves that can help them attain more autonomy or stabilization are encouraged and supported as client services staff are able.

Housing staff and client services staff leadership meet weekly to discuss clients who may be struggling financially or with behaviors that are concerning or disruptive to the community and may be a threat to maintaining stable housing. Both teams then develop a plan for stability and work in concert to apply for additional funding that may be available, or to work to help a person presenting with behaviors like hoarding, where mental health and physical space have to be addressed at the same time.

Tenants in arrears or who are in violation of lease requirements are given multiple opportunities to work with staff and come up with plans to pay arrears down over time, or to change behaviors. Even if their mental illness presents in a defiant way, we work with advocates and/or people in the tenant's life that they trust who may be able to explain or assist us to get signatures on yearly lease documents and other forms that are required by HUD and law.

The frequency of services provided and/or a proposed schedule of when services are available to tenants.

The four client services staff are available in person at the Calypso office, at home or public space visits, and by cell phone or face time/zoom Mondays - Fridays between the hours of 8:00 a.m. -5:00 p.m. on a weekly, monthly or an as-needed/requested basis. Client services staff have dedicated cell phones that clients can reach out to at any time to leave messages and texts regarding emerging needs as they are able to articulate them.

How the supportive services partnership will be funded, including if the applicant is providing funding to support the partnership.

Housing Initiatives has secured some regular annual funding to help support the supportive services program. That primarily takes the following forms:

Annual CoC Grant (Permanent Housing for Chronically Homeless)	\$91,000
Annual City of Madison (Perm. Housing Supportive Services)	\$30,000
<u>Annual Dane County Executive Budget</u>	<u>\$26,000</u>
Total Grant Service Grant Revenue	\$147,000

Although this grant funding appears substantial, it is far from the complete picture. Housing Initiatives also makes a large funding commitment to support services staffing. The actual staffing-only cost associated with those positions is \$304,000 annually. The agency funds the balance of this expense (\$157,00) through general program revenues that are intentionally committed to this level of service.

There are also additional non-staff costs that go into client support, like direct support expenses and utilities.

Relevant performance data that provides insight into the supportive service partner's experience serving the target tenant population, and the outcomes for their tenants. Metrics could include the number of individuals served in a related program in a year, housing retention rates for individuals served in that program, connections to employment, etc.

Housing Initiatives Rent Assistance Program served 169 people in 6/2021-6/2022 of which 150 were adults 18 and over, and 19 were children under the age of 18. Of those residents, 9 were veterans, 82 were chronically homeless individuals, only 21 left the program (20 adults, 1 child under 18). 93 of our program participants have maintained housing with our rent assistance program for more than 5 years. 58 of these participants have NO income, 76 are classified as very low income below the poverty line.

70 Participants in this program had a diagnosed Mental Health disorder, 47 have a domestic violence history, 39 have a diagnosis of Alcohol and/or drug use disorders, 12 have chronic health conditions, 8 a developmental disability, 20 a physical disability and 1 identifies as a person with HIV/AIDS.

This is a population that is typically difficult to keep stabilized in housing, yet Housing Initiative consistently exceeds the projected HUD outcomes.

How the supportive services partner and the applicant will work together to ensure the best outcomes for tenants, such as housing retention.

Our client services team is in place at Housing Initiatives to be able to devote all efforts and attention to HI clients and their partners and/or families, to help to stabilize and support each household as needed to maintain housing and meet basic human needs and also assist in progress toward larger goals identified by clients and their CCS Facilitators when appropriate.

Supportive Housing Plan

Memorandum of Understanding

This memorandum of understanding outlines an agreement between Movin' Out, Inc. (MOI) and Housing Initiatives, Inc. (HI), to deliver housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. **Based on Disabilities:** Both MOI and HI will reserve all residential rental units in the joint scattered site project (79 units total) for tenant households where at least one person has a qualifying disability. Most clients will require additional supportive services. Supportive services will be based on a Housing First model, in which all services are voluntary. Staff from both agencies will play roles both in coordinating the provision of services by other providers in the community.
2. **Tenant Selection:** The initial pool of tenants will be the exiting residents in the subject units, all of whom qualified for supportive housing and the agencies' respective programs at move-in. Moving forward, tenants will be selected based on the respective Tenant Selection Plans of each agency for their respective units.
 - a. For Movin' Out, this will be based primarily on income qualification and disabilities. The agency will in turn rely on a professional property management company to make placement decisions.
 - b. For Housing Initiatives, tenant selection will be based on homelessness, disability and income. The exact selection process will depend in part on the type of funding to be used in supporting each client. Clients supported with Rental Assistance funds will be drawn directly from the Coordinated Entry priority list. Those with VASH vouchers will come as qualified recommendations from the VA, and so on.
3. **Movin' Out and HII will provide services and amenities to meet the following needs of tenants who rely on supportive services:**
 - a. **Stable, Permanent Housing:** Both agencies provide housing that assures tenancy over the long term. Leases are renewable, subject to compliance with lease terms.
 - b. **Affordable Housing:** Movin' Out provides housing at rents affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in all units. Housing Initiatives makes certain that a subsidy is in place for all clients to assure that none pay more than 30% of income for rent, or no rent for those who lack any income whatsoever.
 - c. **Appropriate Property Management.** Both agencies utilize property management that

is tailored to tenants whose disabilities may require unconventional approaches and individualized accommodations. Property management will coordinate with and complement day to day supportive services.

- d. Supportive Services: Supportive Services will be optional, following the Housing First model. Agency staff will work to develop supportive service plans based on the unique needs of each resident. Such plans will utilize a wide range of services agencies throughout Dane County. Examples include Journey Mental Health, the Aging and Disability Resource Center, Tellurian, I-Care, and many more. Additionally, the Comprehensive Community Services (CCS) system will be employed to build service networks around clients who opt into this system.
- e. Housing Location: Clients with disabilities need housing that feels ordinary in the sense that it is not isolated or segregated from mainstream housing. Both Movin' Out and HII have properties that are in established residential neighborhoods with useful amenities nearby.

Service Planning and Funding

Service planning will most often be coordinated initially by Movin' Out and HII staff. As individualized service plans are established, many of them will be specialized such that they require no further management or intervention from agency staff on a regular basis.

Each agency (Movin' Out and HII) have established grants and operational funds in place for supportive service staff at the current levels. Such funding does not pay for the services utilized in many cases, but the providing agencies have their own sources of revenue based on their directives and purposes.

For Housing Initiatives, Inc.

Brad Hinkfuss

Date: 7/1/22

For Movin' Out, Inc.:

Katlynne Duerbeck

Date: 7/1/22

Movin' Out Housing Initiatives Scattered Sites Madison
Housing Plan for Supportive Housing
Memorandum of Understanding

This memorandum of understanding is an understanding between My Choice's Family Care and Partnership programs and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider, represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. Movin' Out will reserve all units of the residential rental units in its Movin' Out Housing Initiatives Scattered Site Madison development in Madison for tenant households that include at least one tenant with a disability. Many of these households will include a resident who relies on supportive services coordinated and funded by My Choice's Family Care and Partnership programs. Movin' Out commits to accommodate the delivery of supportive services by an outside agency if needed for the life of the project.
2. The initial pool of tenants can be applicants with cognitive, mental, behavioral, and physical disabilities who are members of My Choice's Family Care and/or Partnership programs, live in Dane County and who are referred by My Choice care teams. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from My Choice care teams.
3. Movin' Out will provide housing and associated amenities for tenants who rely on supportive services:
 - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
 - b. Tenants need housing that complements their goals for economic self-sufficiency. Movin' Out will design units to be functional as residential units and will provide an business/community center available to tenants to conduct meetings and carry out activities to engage in job-related activity, career development, and financial literacy.
 - c. Tenants with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in all units that will be available to referrals by funders and providers of Long-term Care in Dane County.
 - d. Tenants with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.
 - e. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.

4. My Choice will provide comprehensive case management services based upon individual tenant's assessed needs and their care plan.
 - a. Tenants with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. My Choice contracts with a network of providers to support the identified and assessed needs of each individual member. Services that may be supported by My Choice include range of various services that are identified by viewing this link - <https://www.dhs.wisconsin.gov/publications/p0/p00570.pdf>

My Choice funds and coordinates providers to assist members with meeting their assessed needs. The tenants designated for supportive services will have Member Centered Plans. Services for members enrolled in Family Care or Family Care Partnership are determined based on the desired outcomes of each person and their support team. Individuals have the right to direct their own services as appropriate, including choosing their caregivers and service providers. These services are described in detail within the document at the above link.

How Services Will Be Planned and Funded

The proposed tenants may receive community-based supportive services funded and coordinated by My Choice based upon individual needs. Each tenant has a My Choice Interdisciplinary Team who assists the tenant in creating a Member Centered plan based upon identified needs and member outcomes. The My Choice care team identifies service providers, authorizes services, monitoring and documenting the quality of supports delivered.

Prospective tenants who are enrolled in My Choice Wisconsin may choose to utilize a My Choice contracted agency or they may choose to self-direct the supports in their Member Centered Plan, as appropriate.

For My Choice:

Date 7/1/12

For Movin' Out, Inc.:



Date 7/1/12

Movin' Out Housing Initiatives Scattered Sites Madison

Housing Plan for Supportive Housing

Memorandum of Understanding

This memorandum of understanding is an understanding between Dane County Department of Human Services Adult Mental Health Services and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider and represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. Movin' Out will reserve all residential rental units in the Movin' Out / Housing Initiatives Scattered Sites development in the City of Madison, Wisconsin for tenant households where one person has a disability. Any number of these units may include at least one tenant with disabilities who relies on supportive services coordinated and funded by Dane County Department of Human Services Adult Mental Health Services. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants there may be people with mental and behavioral disabilities who are clients of Dane County Department of Human Services Adult Mental Health Service, live in Dane County and who are referred by Dane County Department of Human Services Adult Mental Health Services. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County Department of Human Services Adult Mental Health Services staff or their contracted direct service providers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:
 - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
 - b. Tenants with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in all units.
 - c. Tenants with disabilities need disability-sensitive property management: Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.
 - d. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens: Movin' Out will develop housing units

built to accommodate the needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.

4. Dane County Department of Human Services Adult Mental Health Services will provide comprehensive case management based upon individual tenant's assessed needs.
 - a. Tenants with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Dane County Department of Human Services Adult Mental Health Services contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Dane County Department of Human Services Adult Mental Health Services include needed support, available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.

5. Dane County Department of Human Services Adult Mental Health Services will coordinate providers to assist members with meeting their assessed needs. The tenants designated for supportive services will have individualized plans. Services are determined based on the needs and desires of each person and their support team. Individuals have the right to direct their own services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective residents will be provided supports as identified in their individualized plan. These supports may include:
 - a. Financial Management: Dane County Department of Human Services Adult Mental Health Services will assess needs, preference, and aptitudes for increasing economic self-sufficiency. Dane County Department of Human Services Adult Mental Health Services members may be eligible for vocational services. Employment and career counseling may provide planning assistance in achieving employment by connecting enrolled members to community resources, providing career exploration, and performing informational interviewing with professionals and employers. Vocational services can address barriers to employment by connecting tenants to a Benefits Specialist who will explain how employment will affect benefits and what work incentives are available. Financial literacy training may be available to increase understanding and build good practices in handling money and credit.
 - b. Self-Directed Service: Autonomy and Choice: providers chosen by tenants can ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.

- c. Relationships/Community Involvement: the supportive services provider can assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and may receive support to help in coordinating plans, help with maintaining relationships with friends and neighbors, and/or the coordination of transportation, as needed, to get to the right place at the right time.
- d. Organization/communication: the supportive services provider staff may work cooperatively with individuals to plan and organize daily routines, including coordinating transportation, special events, communicating as needed with other service providers, care management team, and family members.
- e. Medication assistance and medical advocacy: Staff may assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff can also attend medical appointments to assist individuals with communicating with medical providers and advocating on their behalf. Staff can work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are attended to promptly and appropriately. Staff can monitor the need for follow up appointments and maintain documentation of medical history.
- f. Home maintenance: Staff may assist, to the degree necessary, with home maintenance including cleaning all areas of the apartments, organizing, laundry, and maintaining a safe home environment.
- g. Meal Planning/Groceries: The supportive services provider may assist with meal planning, nutrition education and grocery shopping for each individual, as needed. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services may also include education and/or guidance around special dietary requirements (e.g., diabetic diet) and healthy eating.

How Services will be Planned and Funded

Upon referral to the Dane County Department of Human Services, County staff will determine if the individual referred is interested, eligible and qualified for behavioral health services. If found eligible, the proposed tenants may receive community-based supportive services funded and coordinated by Dane County Department of Human Services, based upon individual needs.

Each tenant has a Dane County Department of Human Services Adult Mental Health Services case manager who assists the tenant in creating an individualized plan based upon identified needs and desired outcomes. The Dane County Department of Human Services Adult Mental Health Services staff and identifies service providers will monitor and document the quality of supports delivered.

All referrals for behavioral health services should go through the Dane County Department of Human Services, Behavioral Health Resource Center (BHRC). The Aging and Disability Resource Center of Dane County will offer prospective tenants with disabilities a central source of information, assistance and access to community resources for older people and people with disabilities, as well as their families. Personalized assistance is available at the resource center, over the telephone, or in visits to an individual's home.

Professional staff will assist adults to sort through options and make informed decisions.

For Dane County Department of Human Services

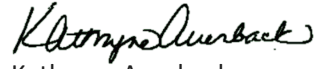
Adult Mental Health Services:

Hannah Whaley, Behavioral Health Manager
Dane County Department of Human Services



Date: 07/06/2022

For Movin' Out, Inc.:



Kathryne Auerback
Executive Director,
Movin' Out, Inc.

Date: 7/6/2022

Comprehensive Community Services (CCS)

Comprehensive Community Services, or CCS, is

a program that provides mental health and substance use

services to people of all ages. The intent of CCS services is to assist people in identifying their personal goals and in working towards those goals at their own pace. In the CCS program ***you are in charge of your own recovery.***

Who is Eligible for CCS?

CCS is available to adults and children

who meet the following criteria:

- Dane County resident
- Eligible for Medical Assistance, BadgerCare, or another Medicaid program
- Have a mental health and/or substance use diagnosis
- Have a need for psychosocial

rehabilitation services

- Eligible as determined by a Wisconsin Functional Screen

What Can I Expect?

Intake

You will talk with a CCS Intake Worker at Dane County Department of Human Services to discuss whether CCS is right for you. The Intake Worker will verify your insurance, assist you with obtaining a doctor's prescription for CCS services, and complete an interview with you to ensure that you are eligible for CCS. If you qualify for CCS Services and decide that CCS is right for you, the Intake Worker will help you connect with a Service Facilitator.

Recovery Team

You and your Service Facilitator will work together to assess your strengths and needs. You and

On any journey, we must find out where we are before we can plan the first step.

-Kathy Boevink

your Service Facilitator will also assemble a Recovery Team made up of people you identify and trust. Your Recovery Team will help you develop a

recovery plan that outlines *your* goals on *your* path to recovery. Your Recovery Team will offer encouragement and problem solving assistance.

CCS Services

Once you have developed a Recovery Plan in collaboration with your Recovery Team, your Service Facilitator will assist you with identifying the service providers you would like to enlist to provide the services you need. In many instances you will have the ability to choose from several available service providers. If you choose a provider and later would like a different provider, you can make that request... it is up to you!

Growth is never by mere chance; It is the result of forces working together.

*- James Cash Penney
Founder JCPenney stores*

You may remain in CCS as long as you continue to meet the eligibility criteria and are working on your recovery goals. You can decide to withdraw from the CCS program at any time.

CCS Values

CCS embraces many core values in its approach to the delivery of mental health and substance use services. CCS values include:

- Respect of client values—what is important to you?
- Inclusion of natural supports and family—who is important to you?
- Flexibility of services—what you need, when you need it.
- Community—services will be provided where you need and want them.
- Respect of client choice—it's up to you!

How do I apply for CCS?

To obtain more information or apply for Comprehensive Community Services, please call Dane County Department of Human Services CCS Intake Workers:

CCS Services for Youth (under 18):
(608) 283-1400

CCS Services for Adults (18 or older):
(608) 242-6415

This brochure is also available in Spanish and Hmong. We will provide an interpreter if necessary.

Este folleto también está disponible en español y Hmong. Proporcionaremos un intérprete si es necesario.

Daim ntawv qhia no tseem muaj Mev thiab Hmoob. Peb yuav muab ib tug neeg txhais lus yog tias tsim nyog.

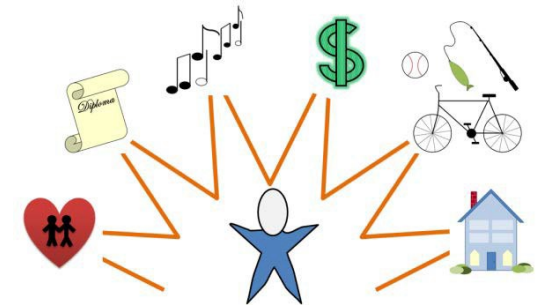
24-Hour Crisis Services

If you are experiencing a mental health crisis, Journey Mental Health Center provides 24-hour crisis services to all residents regardless of insurance.

Contact Information:
(608) 280-2600

January 2017

Comprehensive Community Services



**Your vision, your plan,
your recovery!**

1202 Northport Drive
Madison WI 53704
608-242-6415 (adults)
608-283-1400 (youth)
www.danecountyhumanservices.org



Movin' Out Housing Initiatives Scattered Sites Madison

Housing Plan for Supportive Housing

Memorandum of Understanding

This memorandum of understanding is an understanding between Dane County Department of Human Services Children's Long-Term Support Program and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider, represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

Services Offered:

1. Movin' Out will reserve all residential rental units in its the Movin' Out Housing Initiatives Scattered Sites Madison development in the City of Madison, Wisconsin for tenant households where one person has a disability. Any number of these units may include a household that includes at least one child with disabilities who relies on supportive services coordinated and funded by Dane County Department of Human Services Children's Long-Term Support Program. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. In the initial pool of tenants there may be families with children with developmental, physical, or severe emotional disabilities who are clients of Dane County Department of Human Services Children's Long-Term Support Service, live in Dane County and who are referred by Dane County Department of Human Services Children's Long-Term Support Program. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County Department of Human Services Children's Long-Term Support Program staff or their contracted direct service providers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants with children who rely on supportive services:
 - a. Tenants with children with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
 - b. Tenants with children with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in all units.
 - c. Tenants with children with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.

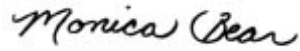
- d. Tenants with children with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.
4. Dane County Department of Human Services Children's Long-Term Support Program will provide comprehensive case management based upon individual family's children's assessed needs.
 - a. Tenants with children with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Dane County Department of Human Services Children's Long-Term Support Program contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Dane County Department of Human Services Children's Long-Term Support Program include needed respite for parents as well as support, available in tenants' homes, to teach or maintain good nutrition, hygiene and health, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, help in figuring out how to get to school and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to school, appointments, and other commitments on time and prepared.
5. Dane County Department of Human Services Children's Long-Term Support Program will coordinate providers to assist families with meeting their child's assessed needs. The tenants with children designated for supportive services will have individualized plans. Services are determined based on the needs and desires of the family and their support team. Families have the right to direct their own services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective resident children served by Dane County will be provided supports as identified in their individualized plan. These supports may include: respite, daily living skills, consumer education, training for unpaid caregivers (parents) and community integration services. All CLTS children have a support and service coordinator (case manager) who coordinates their plan and works with them to access the services they need.

How Services will be Planned and Funded

The proposed tenants may receive community-based supportive services for their child funded and coordinated by Dane County Department of Human Services Children's Long-Term Support Program based upon individual needs. Each tenant's child has a case manager who assists the tenant in creating

an individualized plan, accessing and coordinating needed supports based upon the child's identified needs and desired outcomes.

*For Dane County Department of Human Services
Children's Long-Term Support Program:*



Community Services Manager-Disability Services
Dane County Human Services

Date 7/6/2-22

For Movin' Out, Inc.



Kathryne Auerback, Executive Director

Date: 7/6/2022

Comprehensive Community Services (CCS)

Comprehensive Community Services, or CCS, is

a program that provides mental health and substance use

services to people of all ages. The intent of CCS services is to assist people in identifying their personal goals and in working towards those goals at their own pace. In the CCS program ***you are in charge of your own recovery.***

Who is Eligible for CCS?

CCS is available to adults and children

who meet the following criteria:

- Dane County resident
- Eligible for Medical Assistance, BadgerCare, or another Medicaid program
- Have a mental health and/or substance use diagnosis
- Have a need for psychosocial

rehabilitation services

- Eligible as determined by a Wisconsin Functional Screen

What Can I Expect?

Intake

You will talk with a CCS Intake Worker at Dane County Department of Human Services to discuss whether CCS is right for you. The Intake Worker will verify your insurance, assist you with obtaining a doctor's prescription for CCS services, and complete an interview with you to ensure that you are eligible for CCS. If you qualify for CCS Services and decide that CCS is right for you, the Intake Worker will help you connect with a Service Facilitator.

Recovery Team

You and your Service Facilitator will work together to assess your strengths and needs. You and

On any journey, we must find out where we are before we can plan the first step.

-Kathy Boevink

your Service Facilitator will also assemble a Recovery Team made up of people you identify and trust. Your Recovery Team will help you develop a

recovery plan that outlines *your* goals on *your* path to recovery. Your Recovery Team will offer encouragement and problem solving assistance.

CCS Services

Once you have developed a Recovery Plan in collaboration with your Recovery Team, your Service Facilitator will assist you with identifying the service providers you would like to enlist to provide the services you need. In many instances you will have the ability to choose from several available service providers. If you choose a provider and later would like a different provider, you can make that request. . . it is up to you!

Growth is never by mere chance; It is the result of forces working together.

*- James Cash Penney
Founder JCPenney stores*

You may remain in CCS as long as you continue to meet the eligibility criteria and are working on your recovery goals. You can decide to withdraw from the CCS program at any time.

CCS Values

CCS embraces many core values in its approach to the delivery of mental health and substance use services. CCS values include:

- Respect of client values—what is important to you?
- Inclusion of natural supports and family—who is important to you?
- Flexibility of services—what you need, when you need it.
- Community—services will be provided where you need and want them.
- Respect of client choice—it's up to you!

How do I apply for CCS?

To obtain more information or apply for Comprehensive Community Services, please call Dane County Department of Human Services CCS Intake Workers:

CCS Services for Youth (under 18):
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CCS Services for Adults (18 or older):
(608) 242-6415

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Este folleto también está disponible en español y Hmong. Proporcionaremos un intérprete si es necesario.

Daim ntawv qhia no tseem muaj Mev thiab Hmoob. Peb yuav muab ib tug neeg txhais lus yog tias tsim nyog.

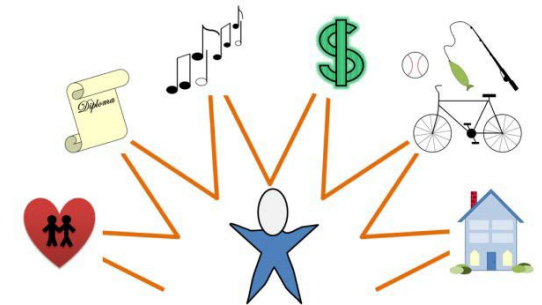
24-Hour Crisis Services

If you are experiencing a mental health crisis, Journey Mental Health Center provides 24-hour crisis services to all residents regardless of insurance.

Contact Information:
(608) 280-2600

January 2017

Comprehensive Community Services



***Your vision, your plan,
your recovery!***

1202 Northport Drive
Madison WI 53704
608-242-6415 (adults)
608-283-1400 (youth)
www.danecountyhumanservices.org



2022 Affordable Housing Fund-Tax Credit RFP

Supplemental Application Questions

Movin' Out & Housing Initiatives Scattered Site & New Construction

Response Submission Due Date: August 17, 2022 NOON

Instructions to Applicants:

Please respond *briefly and succinctly* to the questions below in-line, unless otherwise specified (e.g. additional documentation requested). Maximum 1/3 a page per question. Please use this Word document to record your answers and return this completed document to cddapplications@cityofmadison.com. Please cc: jspears@cityofmadison.com. We ask that you refrain from submitting additional documentation not specifically requested at this time or using alternative formats.

Questions:

A. Land Use and Community Engagement

- 1. Provide an update on the location/site selection for the 8-unit new construction component of this proposal.**

At this time, we have not yet further identified a location/site for the new construction building. We continue to work through feasibility analyses but that has been focused on obtaining quote for Capital Needs Assessments and basic architectural services. We will need to get through the initial CNA's and individual lot assessments first.

B. Supportive Housing Units/Supportive Housing Partnerships

- 1. Please clarify what is meant by 60 units for people experiencing homelessness with 30 units from Coordinated Entry (who are also experiencing homelessness)? At turn over, how will the other 30 of 60 units be filled?**

Housing Initiatives has a tenant selection plan that charts several avenues to bring in referrals. All of the referrals and placements require documented evidence of homeless and serious mental illness. The primary difference between a Coordinated Entry referral and one from another source – such as the VA – is typically just the *length* of homelessness required. Our response here was meant to indicate that all 60 units will be set aside for households experiencing homelessness and mental illness. Of those 60, at least 30 will come from the Coordinated Entry list and will therefore meet that set of standards. Only a limited number can come through Coordinated Entry because all such clients are supported with Rental Assistance, a finite funding source. The other 30 would come from other referrals such as the VA, the CDA or other supportive housing providers that can provide alternative means of supporting clients' rent.

C. Property Management

- 1. Detail your experience in successfully utilizing alternatives to eviction, both pre- and post filing, such as mediation, payment plans, etc.**

Housing Initiatives has developed several strategies in attempting to prevent eviction. This starts with closely monitoring clients' performance and responding quickly when someone starts to fall behind. The approach is infused with support and flexibility. The supportive service staff work hand-in-hand with the property manager to set up payment plans, identify new sources of income, and seek community resources to help pay rent in situations where non-payment becomes an issue. Agency staff have also learned to work with the legal system to negotiate approaches that result in workable outcomes. One example would be agreeing to court-stipulated rent payment plans that preserve housing rather than result in eviction. A second example involves engaging with third-party mediators to devise plans that preserve housing while ensuring rent payment. Yet another would be finding new housing options for clients through voluntary departures or transfers rather than eviction, thereby preserving a stable housing history. The key to the agency's approach is to always any option that avoids eviction while still meeting the demands of the lease and the law.

- 2. In offering a security deposit installment option, please confirm that it is the responsibility of the tenant to request an installment – one will not be preemptively offered as an option. Have you utilized this practice in the past? What percent of security deposits are paid by installment?**

Yes, Movin' Out has offered this practice often in the past. The option for an installment plan for the security deposit is clearly communicated at initial application and supported should an applicant have the need.

For Housing Initiatives, the most common practice by far is to have the source of the housing subsidy provide for the security deposit, not the clients directly. This removes what could otherwise be a primary barrier for the chronically homeless and mentally ill clientele. Security deposits are typically paid up front by the subsidy source, or as excess grant funds may become available in any given month (by means of Rental Assistance allowances).

D. Financing

- 1. For Preservation & Rehab Proposals, CDD offers half of the loan to be forgivable. See Financing Terms in Section 1.4 RFP for details. Is this proposal seeking the newly offered terms that waives shared appreciation in the Long-Term Deferred Note in exchange for permanent affordability recorded in a Land Use Restriction Agreement? Please clarify the answer to Question 4. Does this impact your request from the City?**

We are open to taking these terms along with the permanent affordability (as noted in our response to question #4). At this time, the project was not showing payments to the City funds due the amount of Deferred Developer Fee required to balance the sources and uses. Taking this proposed approach doesn't change the amount of soft funding needed to ensure feasibility. Another way of saying it is that changing the

interest rate doesn't impact the sources and uses because the funding was not contributing to an annual debt service calculation.

Supplemental Questions Once Site Is Selected

CDD requests that the following questions, amongst potential others, be answered once the site is selected:

E. Land Use and Community Engagement

1. Please describe the feedback that you received from the Development Assistance Team (DAT) presentation.
2. Provide a brief summary of the feedback and comments that received at the neighborhood meeting.
3. Did feedback from DAT and/or neighborhood meeting result in a significant impact on the site plan/land use application, and therefore budget and unit mix? Please submit an updated budget and unit mix accordingly.

F. Energy Efficiency

1. The City expects awardees to continue working with Focus on Energy's New Construction Energy Design Assistance throughout the building design process. The City will incorporate commitments into the term sheet.
 - a. Please attach the Results Report and Bundle Requirements Document from the Whole Building Analysis.
 - b. What percentage of projected Energy Use Intensity (EUI) saving calculated over the baseline energy code is anticipated? (Note: 20% required.)
 - c. What is the highest feasible Bundle Level to which this project can commit?
2. Please elaborate on plan and timeline to obtain energy analyses from Focus on Energy's Multifamily Program for the rehab sites.

G. Renewable Energy

1. Please summarize any feedback provided by Focus on Energy's Renewable Energy team on the project's proposed PV solar array system and sizing.
2. Will the proposed project incorporate any Renewable Energy systems in addition to the minimum 30 kW solar photovoltaics (PV)? e.g., solar thermal, biogas, biomass and wind). Please describe.

H. Sustainable Building Design Elements

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

I. Other – Rehab & Capital Needs Assessments

- 1. Please provide an update on the Capital Needs Assessments and/or contractor walk-throughs. In lieu of completing all CNA's at this time, by when can the development team obtain and submit at least three CNA's base on best, worst and average case scenario rehab needs?**

We are assuming this question was intended to be answered in this initial response (versus after a site is selected). We currently have three proposals for full CNA's of all 71 units. We anticipate getting this work fully complete by the end of September. Ideally we'd like to get the full CNA complete and not split up the process. It's much easier for a team to set aside a couple of days and have a system they can use to complete the inspections all at the same time. If the City would like information prior to that we can ask the CNA provider if that is feasible. It likely would only save a couple of weeks at most though.