

# Application for Neighborhood and Community Development Funds

Submit original and 23 complete copies of this application to the CDBG Office by 4:30 p.m. on the 15<sup>th</sup> of the month, to be reviewed by the CDBG Committee on the first Thursday of the following month. **When possible, please duplex your original and copies and send an electronic version to the assigned project manager (if known).**

Program Title:	Futures Fund – Cherokee Prairie Senior Housing (see Plat of Survey map attached – PARCEL B)	Amount Requested:	\$ 93,000 revised 12/09
Agency:	Independent Living, Inc.		
Address:	815 Forward Dr. Madison, WI 53711		
Contact Person:	Rita Giovannoni. CEO	Telephone:	608 274-7900 x 130
Email:	rgiovannoni@independenliving.com	Fax:	608 274-9181

1. **Program Abstract:** Provide an overview of the project. Identify the community need to be addressed. Summarize the program's major purpose in terms of need to be addressed, the goals, procedures to be utilized, and the expected outcomes. **Limit response to 150 words.**

Independent Living is resubmitting this request for consideration in January 2010 due to the fact that sufficient funds were not available in the 2009 funding cycle through the CDBG office when this grant request was submitted in the fall of 2009. We are grateful for the allocation of \$4,000 of funds that were awarded in October within the constraints of 2009 funding availability.

Independent Living, Inc. (ILI) seeks Futures Funds to support pre-development activities for a unique, environmentally sustainable, seniors' housing development off Wheeler Road near the City of Madison's northeast side. Cherokee Prairie Senior Housing in collaboration with Cherokee Fitness will create a new paradigm for senior housing with purposeful attention to fitness, health and wellness. ILI promotes active living in its current properties in Madison, Fitchburg and Sun Prairie. This new development will offer unique and enhanced fitness opportunities for older adults designed by fitness professionals from Cherokee Club and Fitness Center.

Affordable housing for our burgeoning senior population is a City of Madison priority. The land under consideration for development by ILI is located in an area where service-supported, affordable senior housing is sparse. Cherokee Prairie Senior Housing will offer affordable rental housing with a mix of 100 Residential Care Apartments, 24 Assisted Living units and 24 Memory Care units for a total of 148 units.

2. **Target Population:** Identify the projected target population for this program in terms of age, residency, race, income eligibility criteria, and other unique characteristics or sub-groups.

The target population for Cherokee Prairie Senior Housing is moderate and low-income, older adults 55+ seeking rental housing that offers a continuum of care from basic service support such as weeknight meals, housekeeping services and emergency call services to round the clock assisted living and care for residents with a diagnosis of dementia or Alzheimer's disease.

222 # unduplicated individuals estimated to be served by this project.

148 # unduplicated households estimated to be served by this project.

3. Program Objectives: The 5-Year Plan lists 9 project objectives (A through N). Circle the one most applicable to your proposal and describe how this project addresses that objective.

- |   |                                |
|---|--------------------------------|
| A. Housing – Existing Owner-Occupied      | G. Neighborhood Civic Places   |
| B. Housing – For Buyers                   | K. Community-based Facilities  |
| <u>C. Housing – Rental Housing</u>        | L. Neighborhood Revitalization |
| E. Economic Dev. – Business Creating Jobs | N. Access to Housing Resources |
| F. Economic Dev. – Micro-enterprise       |                                |

Cherokee Prairie Senior Housing will provide 148 environmentally sustainable, rental units of service-supported, senior housing for low and moderate income older adults. The northside planning area which includes the Northport, Warner Park, Sherman and Cherokee neighborhoods is getting older experiencing a 6% increase in persons 65 or older from 1990 to 2000. The most populous age group is now 45-60. Those residents 65 years old and older are some of the most economically dependent. "As this (45-60 age) population segment continues to age...there will be a much greater demand for senior services." (Neighborhood Plan 2009). Demographically, the northside area is more ethnically diverse than other parts of Madison and has a somewhat lower median income" (Northside Market Analysis, 2008).

The planned Cherokee Prairie Senior Housing development is located just off Wheeler Road in proximity to the Cherokee Golf Club and Fitness Center. There will be 100 residential care units, 24 assisted living and 24 memory care units. Plans for the facility include an emphasis on "green" building with an ultimate goal of LEED certification. Independent Living, Inc., the developer has a history of incorporating active living and lifelong learning in each of its three other senior facilities. Cherokee Prairie offers a unique opportunity for collaboration with the staff of Cherokee Fitness to introduce a "seniors" level of health and fitness activities within the facility and at the nearby Cherokee Fitness Center and lifelong learning in its housing environment.

In addition of providing experienced, quality services for the older adult residents, the development of Cherokee Prairie will bring new jobs to the Northside community. Additionally, as older adult homeowners move into Cherokee Prairie to enjoy a community of their peers, take part in fitness and other activities and receive the care and services needed as they age, they free up housing stock for sale or rent by younger, first-time buyers in the area.

We also believe this project will have significant **Economic Development – Business Creating Jobs** impact for the North side community. Our preliminary analysis indicates that during the construction phases of the project the labor costs are estimated at \$7.5 million dollars and will support an estimated 48 full time skilled trades jobs. Also project soft costs estimated at \$3.5 million dollars will support approximately 13.5 professionals full time.

Once the project is completed and opened, the project will create 35-40 new Full Time Equivalent positions serving the project on a permanent basis.

4. Fund Objectives: Check the fund program objective which this project meets. (Check all for which you seek funding.)

Acquisition/ Rehab	<input type="checkbox"/> New Construction, Acquisition, Expansion of Existing Building	Futures	<input type="checkbox"/> Prototype
	<input type="checkbox"/> Accessibility		<input checked="" type="checkbox"/> Feasibility Study
	<input type="checkbox"/> Maintenance/Rehab		<input type="checkbox"/> Revitalization Opportunity
	<input type="checkbox"/> Other		<input checked="" type="checkbox"/> New Method or Approach
Housing	<input checked="" type="checkbox"/> Rental Housing	Homeless	<input type="checkbox"/> Housing Services
	<input type="checkbox"/> Housing For Buyers		

5. Budget: Summarize your project budget by estimated costs, revenue, and fund source.

**SEE ATTACHMENT A**

EXPENDITURES	TOTAL PROJECT COSTS	AMOUNT OF CD REVENUES	AMOUNT OF NON-CD REVENUES	SOURCE OF NON-CD FUNDED PORTION
<b>A. Personnel Costs</b>				
1. Salaries/Wages (attach detail)				
2. Fringe Benefits				
3. Payroll Taxes				
<b>B. Non-Personnel Costs</b>				
1. Office Supplies/Postage				
2. Telephone				
3. Rent/Utilities				
4. Professional Fees & Contract Services				
5. Work Supplies and Tools				
6. Other:				
<b>C. Capital Budget Expenditures</b> (Detail in attachment C)				
1. Capital Cost of Assistance to Individuals (Loans)				
2. Other Capital Costs:				
<b>D. TOTAL (A+B+C)</b>				

6. Action Plan/Timetable

Describe the major actors and activities, sequence, and service location, days and hours which will be used to achieve the outcomes listed in # 1.

Estimated Month of Completion  
(If applicable)

Use the following format:  
(Who) will do (what) to (whom and how many)  
(when) (where) (how often). A flowchart may be helpful.

**PLEASE SEE ATTACHED TABLE OF ACTIVITIES, RESPONSIBILITIES, TIMEFRAME AND STATUS**

7. What was the response of the alderperson of the district to the project?

Michael Schumacher, District 18 Alderperson, is familiar with and supports the development of Cherokee Prairie Senior Housing.

8. Does agency seek funds for property acquisition and/or rehab? [If applicable, describe the amount of funds committed or proposed to be used to meet the 25% match requirements (HOME or ESG) with its qualifications.]

☒ No Complete Attachment A

☐ Yes Complete Attachment B and C and one of the following:

☐ D Facilities

☐ E Housing for Buyers

☐ F Rental Housing and Proforma

9. Do you qualify as a Community Housing Development Organization (CHDO)? (See attachment G for qualifications.)

☒ No

☐ Yes - Complete Attachment G

10. Do you seek Scattered Site Acquisition Funds for acquisition of service-enriched housing?

☒ No

☐ Yes - Complete Attachment B, C, F, and H

11. Do you seek ESG funds for services to homeless persons?

☒ No

☐ Yes - Complete Attachment I

12. This proposal is hereby submitted with the approval of the Board of Directors/Department Head and with the knowledge of the agency executive director, and includes the following:

☒ Future Fund (Attachment A)

☐ Housing for Resale (Attachment E)

☐ Property Description (Attachment B)

☐ Rental Housing and Proforma (Attachment F)

☐ Capital Budget (Attachment C)

☐ CHDO (Attachment G)

☐ Community Service Facility (Attachment D)

☐ Scattered Site Funds Addendum (Attachment H)

☐ ESG Funding Addendum (Attachment I)

**NOTE: Signed documents submitted with 23 hard copies**

Signature: John R. Habeck /rg  
President-Board of Directors/Department Head

Date: 12/15/09

Signature: Rita Giovannoni  
Executive Director

Date: 12/15/09

For additional information or assistance in completing this application, please contact the CD Office at 267-0740.

**FUTURE FUND PROPOSAL ONLY**

- A. Describe the project features which make this a prototype project, feasibility study, addresses a short-lived revitalization opportunity or develops a new method or approach, which triggered the need for Future Funds.

The pre-development of Cherokee Prairie Senior Housing utilizes a proactive approach to address the need for affordable senior housing on the City of Madison's northside. While the senior population is predicted to grow significantly in the next five years, there are currently 10 facilities offering RCAC and CBRF levels of care within a five mile radius of the proposed site. In addition, Cherokee Prairie will be developed with attention to environmental sustainability and will offer a new approach in enhanced senior living that promotes fitness, wellness and a healthy lifestyle. In collaboration with Cherokee Fitness, Independent Living will develop a replicable model for fitness integrated housing.

Independent Living, Inc. has more than 30 years experience serving older adults and people with disabilities in Dane County and currently owns and manages three service-supported housing developments for older adults; McKee Park Apartments in Fitchburg, The Gardens and Segoe Gardens Assisted Living in Madison and Olympic Village in Sun Prairie. Independent Living's unique array of in-home services, including transportation to medical appointments, shopping and other activities will be available to residents of Cherokee Prairie Senior Housing also.

Independent Living, Inc. requests Future Funds for:

Development Manager and Construction Cost Estimator - \$50 -60,000  
Architect design fees and reimbursables – \$6-8,000  
Engineer fees and reimbursables - \$6-8,000  
Graphic/reimbursables - \$1,000  
Environmental Reports - \$1,000  
Land Earnest money/Option deposit \$5-10,000  
Initial Legal fees (site control, offer to purchase land, title work/appraisal) - \$12,000  
Market feasibility study and market survey - \$7-8,000  
Administrative costs (postage, copies, etc) - \$1,000  
Early marketing activities (neighbor information, meetings, brochures) - \$3,000  
Predevelopment Contingency - \$5,000

**NOTE: ATTACHMENTS B,C,D,E,F,G,H,I = N/A and not attached**

**PLOT OF SURVEY INDICATING PARCEL B IS ATTACHED**

## Independent Living, Inc. Application for Futures Fund – Revised 12/09

Question # 6:

<b>Activity</b>	<b>Responsible</b>	<b>Timeframe</b>	<b>Status</b>
1. Board presentation/updates	CEO/Development Mgr	May & Aug 2009	Done
2. Board updates incl. Land, Land offer, concept plans	CEO/Development Mgr	Dec. – Jan. 2009/10	
3. Development Mgr Agreement	CEO/Board	Dec. – Jan. 2009/10	
4. Initial Project introduction to City Leadership, Mayor, Alderman, Planning Dept Director and staff	CEO/Development Mgr	June, July, Aug 2009	Done
5. Predevelopment Funding Request	CEO/Development Mgr	Dec. – Jan. 2009/10	
6. Preliminary site plan drafts	CEO/Development Mgr/Engineer	February 2009	
7. In house feasibility – conceptual	Development Mgr	February 2009	
8. Neighborhood Dialogue Periodic meetings throughout Planning process	Alderman/Staff	1 <sup>st</sup> Qtr 2010	
9. Offer to purchase land	Legal/CEO/Dev Mgr	1 <sup>st</sup> Qtr 2010	
10. Contract for Mkt feasibility Study (6 weeks to complete)	CEO/Dev. Mgr	1 <sup>st</sup> Qtr 2010	
11. Architectural concept plan	CEO/Dev. Mgr/ Architect	1 <sup>st</sup> Qtr 2010	
12. Project Proforma	CEO/Dev.Mgr/Constr Estimator	1 <sup>st</sup> Qtr 2010	
13. Start Conceptual City Review process (9-12 Weeks)	Team	2 <sup>nd</sup> Qtr 2010	
14. Start GDP/SIP process	Team	2 <sup>nd</sup> Qtr 2010	
15. Financing Complete	CEO/Dev. Mgr.	4 <sup>th</sup> Qtr 2010	
16. Construction Start (10 months)	Team	4 <sup>th</sup> Qtr 2010/1 <sup>st</sup> Qtr 2011	
17. Construction Complete	Team	3 <sup>rd</sup> Qtr 2011	
18. Occupancy		3 <sup>rd</sup> Qtr 2011	



# **BIRRENKOTT SURVEYING, INC.**

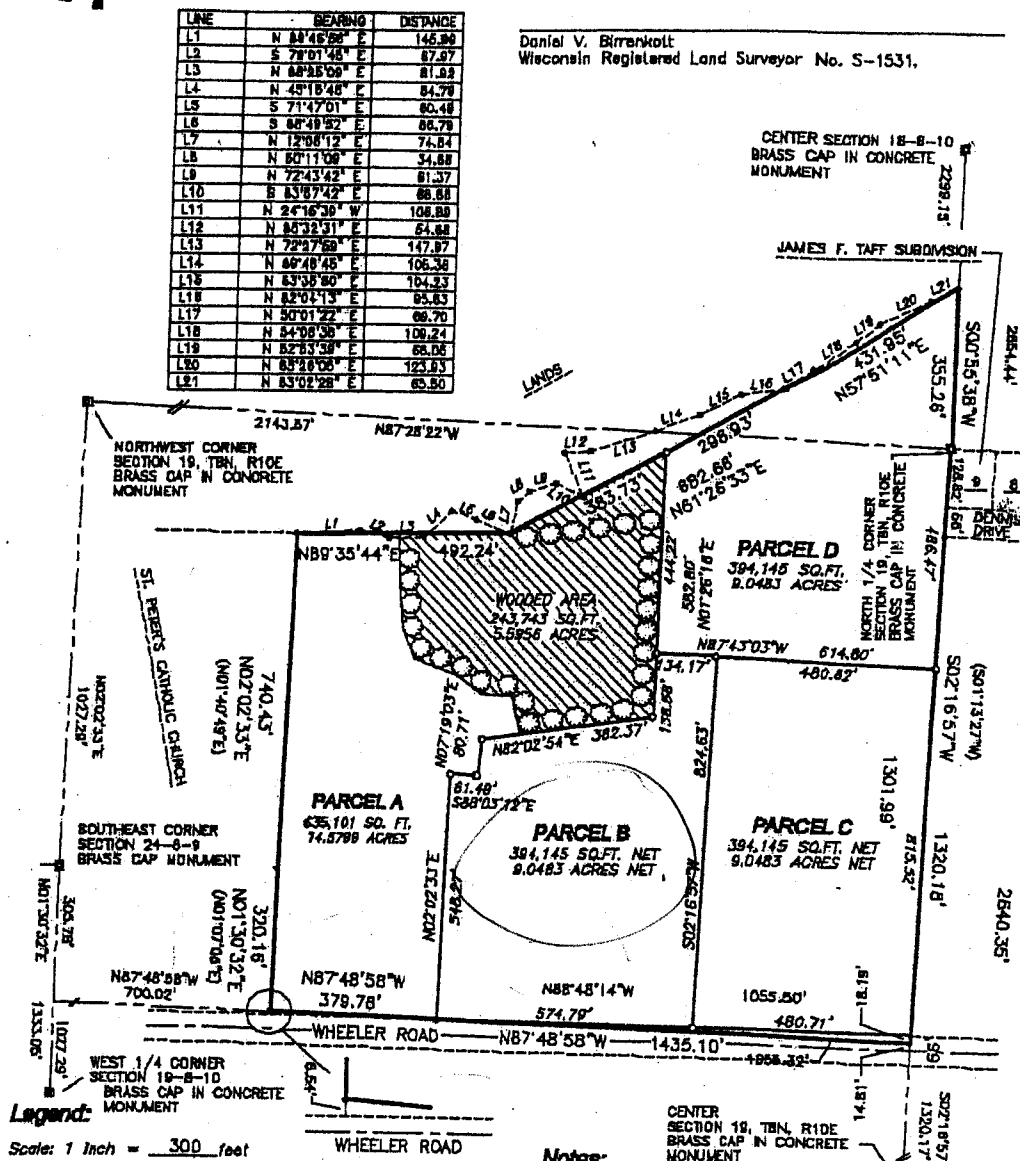
P.O. Box 237  
1877 N. Bristol Street  
Sun Prairie, WI. 53590  
Phone (608) 837-7463  
Fax (608) 837-1081

## **PLAT OF SURVEY**

### **SURVEYOR'S CERTIFICATE:**

I, Daniel V. Birrenkott, hereby certify that this survey is in compliance of Wisconsin Administrative Code. I also certify that I have surveyed and mapped the lands described herein and that the map is a correct representation in accordance with the information provided.

Daniel V. Birrenkott  
Wisconsin Registered Land Surveyor No. S-1531.



### **Legend:**

Scale: 1 Inch = 300 feet

- = Iron stake found
- = 1 1/2" Iron pipe set min. wt. = 1.13# / in. ft.
- = Brass Cap Monument Found
- ( ) = Recorded as data

Dated: 8-17-07

Revised: 8-21-08

Surveyed: RUSS

Drawn: MK & PFWC

Checked:

Approved: DVB

Field book: 288/24-25

Comp. File: J:\2008\080983

Office Map No. 060983A

REFERENCED TO THE NORTH LINE  
OF THE NORTHWEST 1/4 OF  
SECTION 18-B-10 AS N87°18'22"W.