

APPLICATION B: PROGRAMS & SERVICES

This application form should be used for projects seeking funding from City of Madison Request for Proposals #2022-11066; Housing Forward: CDD Financing for Homeownership Development, Programs, and Services and responding to Subsection B – Programs and Services. Applications must be submitted electronically to the City of Madison Community Development Division by noon on September 1, 2022. Email to: cddapplications@cityofmadison.com

APPLICANT INFORMATION

Proposal Title:	Major Home Repair and Rehabilitation Loan Program		
Amount of Funds Requested:	\$ 300,000		
Type of Project:	☒ Rehabilitation ☐ Homebuyer Assistance ☐ Homebuyer Education		
Name of Applicant:	Project Home, Inc.		
Mailing Address:	3841 Kipp St. Madison, WI 53718		
Telephone:	(608) 246-3737	Fax:	(608) 246-3722
Project / Program Contact:	Wyolanda Singleton	Email:	wyolandas@projecthomewi.org
Financial Contact:	Kendra Eppler	Email:	kendrae@projecthomewi.org
Website:	www.projecthomewi.org		
Legal Status:	☒ Non-Profit	Registered on SAM:	☒ Yes ☐ No
Federal EIN:	391279307	SAM/UEI #	MFWMWJEF4CM1

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 <http://www.cityofmadison.com/dcr/aaFormsID.cfm>.

LOBBYING REGISTRATION

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

Name: Wyolanda Singleton Date: 8/30/2022

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

PROPOSAL OVERVIEW

Provide a brief overview or abstract of your proposal. Include how your proposal meets the goals and objectives, and if applicable, responds to preferences outlined in the RFP. Include the impact of your proposed program on the community, key characteristics, and if applicable, targeted populations to be served. Examples of target populations can include BIPOC, LGBTQ+, immigrant, income-level, disability, and/or individuals, households, and geographic clusters, etc.

Project Home is requesting funding to operate a major home repair and rehabilitation program as a deferred payment loan program to low- and moderate-income homeowners.

The home is often the most valuable family asset and requires continual maintenance in order to retain its value. When delayed, these repairs often cause the property to fall into disrepair, have a negative impact on the surrounding neighborhood and community, not to mention on the homeowners who usually feel as though they are neglecting their duties as homeowners but cannot afford the repairs to their homes. The Major Home Rehabilitation Loan Program will improve the physical condition of the existing owner-occupied housing stock. Projects will focus on energy efficiency improvements, health and safety, code-related violations and accessibility modifications. This ensures the housing is not just habitable, but also safe, decent and affordable.

Eligibility for the program is designed for low and moderate homeowners at or below 80% of the county median income level. Service priority will be determined by necessity of repair and household member rankings of elderly, disabled or households with children that have documented lead elevated blood levels.

Major home repairs may include roofing, siding, HVAC, plumbing and electrical repairs/upgrades. Repairs could also address any safety concerns within a home (working and locking doors/windows, installing handrails, removal of tripping hazards, etc.) and any necessary accessibility modifications for people who are aging and those with disabilities. When rehab work is completed the home will meet all local code requirements

Through the value of a deferred payment loan, Project Home will encourage the rehabilitation and preservation of affordable homes in the City of Madison. Project Home will facilitate the rehabilitation of twelve homes to create safer, healthier and energy efficient housing.

FUNDING SOURCE PREFERENCE

The funding sources allocated to this RFP have various requirements and restrictions. It is important for applicants to understand the additional federal regulations imposed on HOME and CDBG funds that the City is unable to waive. Please acknowledge which funds your organization would be willing to accept, if awarded funds through this RFP:

☐ City Levy / Affordable Housing Funds ☐ HOME ☒ CDBG

Project Home is willing to accept either HOME or CDBG dollars if awarded but would prefer CDBG if possible.

CDD will make the final determination of the appropriate mix of financial sources to awarded proposals, based on the information identified above by applicants.

AFFORDABLE HOUSING NEEDS

1. Describe your agency's process in identifying affordable housing needs within the City of Madison and how that process informed this proposal
2. Specifically, describe the data used to inform the anticipated demand for the proposed target populations and how your proposal will assist in meeting that demand.

Use the space below to answer questions 1 & 2 under affordable housing needs.

Project Home serves as the State of WI Weatherization agency for Dane and Green Counties. In our capacity as the weatherization agency, we weatherize approximately 200-300 homes per year for families at or below 60% of the statewide median income. This is well below the 80% CMI we use to qualify households for our rehabilitation programs. The weatherization program has the added benefit of pre-screening income eligibility for potential participants and our weatherization energy auditors can refer homes that need rehabilitation assistance.

Many of the homes that we audit for weatherization will be deferred for weatherization services due to the severity of the home repair needs. These repair needs MUST be addressed prior to when weatherization services can take place. When possible, we can divert many of these projects through our major and minor home repair programs. Once the rehab work is completed, we can then go back to the home and provide energy saving improvements with the weatherization program.

Additionally, Project Home has operated major repair programs in other parts of the Dane County service area for decades. Therefore, the structure and staffing for operating a major home repair program are already in place. As operators of the Weatherization Assistance program, the Emergency Furnace programs and other major and minor rehabilitation programs, we have excellent sources of potential referrals for customers in those programs who are in need of greater rehab assistance.

AGENCY OVERVIEW

1. What other funds will your agency leverage to cover program costs?

Project Home operates multiple programs focused on housing related services including home repair, rehabilitation, weatherization, and energy efficiency. Our programs focus on providing these services for low to moderate income homeowners and their families. We are continually seeking donations of private funds to further support our organization and its programs, with some fundraising efforts specifically focused on supporting the home repair and rehabilitation programs.

Project Home operates the Wisconsin Weatherization Assistance Program (WAP) that focuses on providing energy efficiency improvements, at no cost to the homeowner, saving heating and electrical costs. Also, Project Home was selected by The Federal Home Loan Bank of Chicago to offer subsidies to LMI homeowners through the Affordable Housing Program (AHP) for rehabilitation services. The AHP program is only operated as a "MATCH" program meaning that a

homeowner would need to be income eligible in another program to take advantage of the AHP services.

The WI WAP program has an average investment of \$8,300 in direct costs in single family homes. The AHP subsidy is \$6,000 per home. The AHP program and the WI WAP will significantly extend the reach of the City of Madison rehabilitation funding by extending the investment in each home by thousands of dollars.

2. Describe the agency or team's experience using federal HOME and/or CDBG funds. List past programs administered utilizing HOME or CDBG funds.

Project Home is committed to improving the quality and affordability of housing for low- and moderate-income households in Dane and Green counties. Our mission reflects our belief that strong communities begin with affordable, quality housing. We have managed major home repair programs for Dane and Green counties for many years.

Within the past 10 years we have operated:

- HOME HHR- Funding provided by State of WI Department of Administration (DOA). These HOME funds provide major home repair and rehab services in Green County. Our average award is \$200,000-\$300,000.
- Dane County Major Home Repair (either CDBG or HOME funding). Our average annual award \$165,000-\$300,000.
- Dane County Minor Home Repair (CDBG) Average annual award \$150,000-\$200,000
- City of Madison Minor Home Repair (CDBG) Average annual Award \$215,000-250,000
- NOAH (Neighbor Operated Affordable Housing) (both HOME and CDBG) previously funded \$331,715 with HOME funds and \$433,220 with CDBG funding.
- NSP- Multil Agency Consortium (CDBG Funded) our award was \$951,163.

3. Describe how your agency builds relationships and authentically engages with individuals and households served.
- a. Specifically include information on previous and new strategies to engage individuals or households (who are BIPOC, LGBTQ+, immigrant, low-to-moderate income, and/or have a dis/ability), into your agency's operations and housing programs.
 - b. How does your community shape the direction of your organization?

Project Home has a strong commitment to engaging and building relationships with diverse individuals and households. Our agency 2021 demographics of homeowners supported through our programs are: 59% - Senior Citizens, 50% - Disabled Homeowners, 64% - Female Head of Household, 33% - BIPOC community members, 15% - Military Veterans, below 30% of County Median Income (CMI) - 30%, 30%-50% of CMI - 35% and 50%-80% of CMI - 35%.

Project Home has developed strategic partnerships with other nonprofit agencies to be able to refer to each other based on service needs. This enables us to reach an increasing number of individuals and households within underserved groups such as BIPOC, LGBTQ+, immigrants, low to moderate income and those with disabilities. Through its membership with Community Shares of Wisconsin, Project Home has connected with a number of nonprofits working on equity and social change. Many of these organizations are BIPOC or LGBTQ+ led and have been strong partners in promoting the city of Madison minor home repair program to their staff members and constituents. Project Home has also formed relationships with numerous BIPOC and LGBTQ+ small business owners including Migrants (Chef Oscar Villarreal), Pancake Cafe Stoughton (Drew Ghelfi) and Delta Beer Lab (Tim Piotrowski), through its active membership in Dane Buy Local.

Annually, we present to several organizations, businesses & community members to highlight our programs with the intention of reaching a variety of populations in the City of Madison such as Dane Buy Local, Welcome Home Collective, Sun Prairie Housing Coalition and a Dane County Home Buyer's Roundtable meeting.

We also engage with our target audience by offering free home maintenance classes at several local public libraries and community meeting areas. We continue to offer classes each year to meet and educate individuals in various municipalities in Dane County. This allows us to talk about our programs and meet face to face with those that may have needs that our programs could serve. During COVID-19 protocols all of our classes were held online.

4. Briefly describe your connection to established systems, collaborations, and networks (i.e. referral process or client support). What is your group/agency's role? Identify any partnerships that have been or will be formed to ensure the success of the program.

Project Home is proud to be an advocate promoting housing affordability and stability. Annually, we present to several organizations, businesses & community members to highlight our programs with the intention of reaching a variety of populations in the City of Madison, such as Dane Buy Local, Welcome Home Collective, Sun Prairie Housing Coalition and a Dane County Home Buyer's Roundtable meeting.

As an agency, our goal is to be in homes to provide direct service to the LMI homeowners who request to be supported through our programs. We are well aware of the housing community in our area, and we make every effort to be active participants, so we keep our finger on the pulse of what is happening in our service area as well as understand the offerings of other service organizations. This participation helps us to plan accordingly and make the best referrals if there are additional needs for our homeowners that we do not meet with our services.

Project Home meets with other nonprofit organizations to ensure we have formal and informal referral methods for homeowners. We seek to understand other agency programs and offerings so we can direct homeowners to receive the best service available for their individual needs.

5. Describe how your agency promotes and supports equity in internal policy and procedures and speak to the diversity of your staff.

All agency policies and procedures are clearly defined in our Employee Handbook and Safety Manual. The Employee Manual is reviewed and approved annually by our Personnel Committee and Board of Directors. The Personnel Committee and Board of Directors are comprised of a diverse set of individuals and former professionals in their fields.

We are very cognizant of our compensation practices and have clearly defined position responsibilities and pay ranges. All job descriptions, edits of job descriptions, annual pay increases, job specific pay adjustments, promotions and salary status adjustments are reviewed and approved by our Personnel Committee and Board of Directors. We perform annual performance evaluations and goal setting to guide our employees along their career path.

We engage in internal and external recruiting for positions to provide equal opportunities to our existing staff to progress within the agency. Project Home utilizes a Recruiting Checklist that details a variety of recruiting sourcing options when we have an open position. We strive to promote our open positions through diverse sources to increase our chance of receiving a diverse candidate pool. The most common sources we use with nearly every position are JobCenterofWisconsin.com, City of Madison-RaISe Program, Dane County Affirmative Action office, Urban League and Centro Hispano. As we recruit applicants to join our organization, we continue to look for innovative avenues to attract a diverse set of candidates.

6. List Percent of Staff Turnover in 2021: 30%
7. Divide the number of resignations or terminations in calendar year 2021 by total number of budgeted positions. Do not include seasonal positions. Explain if you had 20% or more turnover rate. Discuss any other noteworthy staff retention issues or policies in place to reduce staff turnover.

The number of terminations/resignations in 2021 was 9. Our 2021 staff budget was for 30 employees. This results in 30% turnover which is very unusual for Project Home. In the previous two years combined, there was just two employee terminations/resignations. Of the nine employees that left the agency in 2021, one was a retirement, three left within 1 month of their hire date, one left within 3 months, and two employees left to start their own businesses. We experience the most turnover in our entry level crew position. In 2022, Project Home began a market compensation study to ensure that we are paying appropriately and fairly for our positions.

8. Indicate by number the following characteristics for your agency's current staff and Board of Directors.

DESCRIPTOR	STAFF	BOARD
*These categories are identified in U.S. Department of Housing and Urban Development (HUD) Standards.		
GENDER	28	9
Female	7	5
Male	21	4
Unknown/Other	0	0
TOTAL GENDER		
AGE		
Less than 18 years old	0	0

18-59 years	22	6
60 years and older	6	3
TOTAL AGE		
RACE*		
White/Caucasian	25	7
Black/African American	2	1
Asian	0	0
American Indian/Alaskan Native	0	0
Native Hawaiian/Other Pacific Islander	0	1
MULTI-RACIAL:		
Black/AA & White/Caucasian	0	0
Asian & White/Caucasian	0	0
Am Indian/Alaskan Native & White/Caucasian	0	0
Am Indian/Alaskan Native & Black/AA	0	0
Balance/Other	0	0
TOTAL RACE		
ETHNICITY		
Hispanic or Latino	1	0
Not Hispanic or Latino	27	9
TOTAL ETHNICITY		
PERSONS WITH DISABILITIES	0	0

PLEASE ATTACH THE FOLLOWING ADDITIONAL INFORMATION AND CHECK THE BOX WHEN ATTACHED:

- ☒ A completed Application Budget Workbook B – “Programs and Services”, showing the City’s proposed financial contribution and all other proposed financing.
- ☒ A current list of Board of Directors, with home addresses included for each board member.
- ☐ If this is a collaborative project, attach Memorandum of Understanding (MOU). MOU should describe the purpose of the collaboration, how it is expected to enhance the activity/project and how it will operate, be governed and share resources. The proposal must identify a lead agency and include a Memorandum of Understanding (MOU) signed by each of the collaborating agencies.
- ☐ If applying for Financial Literacy and Homebuyer Education, provide evidence that organization is current a HUD-Certified counseling agency or evidence of submitted application for HUD Approval.

IF APPLYING FOR

- Homebuyer Assistance proceed to **page 6** and complete section.
- Major / Minor Rehabilitation proceed to **page 8** and complete section.
- Financial Literacy and Homebuyer Education proceed to **page 10** and complete section.

MAJOR / MINOR REHABILITATION

Funds will be applied to: ☒ Major Rehabilitation ☐ Minor Rehabilitation

Estimated total number of units/households to be served:	12
Estimated total number of units/households (<80% CMI):	4
Estimated total number of units/households (<50% CMI):	8
Average amount of CDD funds requested per unit/household:	\$ 24,999

PROGRAM DESIGN

1. Describe in detail the process participants will go through and services they will receive through your program.

The Major Home Rehabilitation Loan Program will be provided as an affordable means for low- and moderate-income homeowners to obtain necessary major home repair and/or rehabilitation services. This means that the HUD Housing Quality Standards inspection demonstrates the rehab needs would be between \$5,001 and \$24,999. There will also be a provision that if a household has repair costs that exceed \$24,999 a waiver could be requested through the city grants administrator to bring the home up to code and stay within the household borrowing limits from the city.

Applicants for the program can apply at any point throughout the year. We first ensure the household meets income qualifications for the program. We determine income eligibility using standards outlined in the *“Technical Guide for Determining Income and Allowances for the HOME Program”* manual. We are adept at reviewing income documentation for the Green County HOME Program, City of Madison Minor Home Repair Subsidy Program, Dane County Minor Home Repair Grant Program, and Dane County Major Home Rehabilitation Loan Program. Depending on the funding source, these programs require compliance with HUD’s CDBG and HOME income-qualification standards.

When the income eligibility process is completed a Project Home, home repair field technician makes an initial visit to the home to perform a HUD Housing Quality Standards (HQS) inspection. Any household items that are “failed” or found to not meet code will be added to the scope of work to be repaired through the program. An initial scope of work will be written up by the Project Home field technician in partnership with the homeowner. This scope of work will be used as the basis for the contractors as they submit bids to complete the work and as a baseline for determining an after-rehabilitation value of the property to ensure it stays within the HUD limits for Dane County.

After contractors attend the “sub-walk”, they will submit their bids. Usually, the lowest responsive bid is selected, and work is then competed at the home. All work will be inspected during progress plus a final inspection at the end of the project to ensure workmanship and proper technique. All contractor work is warrantied for one year along with manufacturers warranties.

Funds will be provided to the customer as a deferred payment loan. The loan is secured by a note and mortgage and is due either when the home is sold or when the property no longer serves as the primary residence of the homeowner. When due, loans are paid directly to the City of Madison to be used for other rehabilitation projects.

2. Describe your agency's affirmative marketing strategy, including what strategies it will include to engage the target population or neighborhood.

Project Home has incorporated Major and Minor Repair Programs into its agency marketing materials. Primary marketing is directed toward low to moderate income homeowners. Secondary marketing is directed toward community organizations that refer customers in need of our services. This marketing includes targeted media and radio directed toward low to moderate income households, as well as targeted newsprint, magazines, web-based articles, church bulletins, community center information boards, community informational meetings, and outreach to senior centers.

Project Home staff members also mention or feature our repair and rehab programs frequently in public presentations and meetings. The programs are also highlighted in media/press coverage including newspaper, TV and radios stories, and in our social media posts.

Another way we engage with our target audience is that we hold free Home Maintenance classes at several local public libraries each year to meet and educate individuals in various cities throughout all of Dane County. This allows us to talk about our programs and meet those with needs that our programs could serve.

Project Home has also established relationships with leaders in municipal building inspection departments and with leaders in community government to identify and receive referrals of property owners with code violations or other service needs that fit within our programs.

3. Describe your agency's affirmative marketing strategy and procurement efforts to encourage the participation of Minority, Women's, Local, and Small Business Enterprise contractors.

Project Home uses the City of Madison Targeted Business Directory as well as the State of Wisconsin Supplier Diversity Program website <https://wisdp.wi.gov/Search.aspx> to identify Minority Business Enterprises (MBE), and Women Owned Business Enterprises (WBE) to help guide our marketing efforts for contractors in Dane County. Project Home also gives preference to Section 3 contractors. Our Housing Rehab Specialist reaches out to contractors on the MBE/WBE list to see if they would like to be included in our pool of contractors when we send out Requests for Bid for our projects. We build an email list for our RFBs and we periodically check the MBE/WBE website to see if any new contractors have been added so we can reach out to them to gauge their interest in being added to our RFB email list. Project Home also has established a relationship with a board member of Dane Buy Local and will occasionally receive local contractor referrals for consideration.

4. If this proposal is for a program already operated by your organization, please explain the outcomes of the program to date, including success rates, number of persons from the target population who have completed repairs on their homes, etc.

Currently, the Major Home Rehabilitation program is operated and administered by City of Madison CDD staff. Although operating this program through the City of Madison would be new to Project Home, we are the agency that administers and operates the Major Home Repair and Rehabilitation program for

Dane County. Adding this program seems a natural fit as we have the protocols, contractors, and staffing in place to successfully administer this major home repair program.

5. Explain agencies past experience utilizing other established rehabilitation programs in State of WI (i.e. State's Division of Energy, Housing and Community Resources (DEHCR) Weatherization Program, State's Lead Safe Housing Program (LSHP)).

Project Home is committed to improving the quality and affordability of housing for low- and moderate-income households in Dane and Green counties. Our mission reflects our belief that strong communities begin with affordable, quality housing. We have managed major home repair programs for both of the counties for many years.

Project Home serves as the State of WI weatherization agency for Dane and Green Counties. In our capacity as the weatherization agency, we operate an Emergency Furnace Program and Emergency Water program with funding from DEHCR through the Department of Energy.

DEHCR provides funding for Project Home to operate its major home repair and rehabilitation program for Green County. Project Home operates this Major home repair/ rehab program as a five-year forgivable loan to homeowners. For those who remain in their homes for five years after their project is completed, the loan is completely forgiven.

Project Home partners with Dane County (CDBG/HOME Housing Access & Affordability Dane County Department of Human Services) to operate a major home repair program (as a deferred payment loan program). and a Minor Home repair program (a grant program that GRANTS LMI households up to \$5,000 for necessary repairs). We offer these services to all participating jurisdictions in the Dane County Consortium.

In addition to our major home rehab work for Dane and Green counties and our minor home repair work for Dane County, we also manage a large subsidy program for minor home repairs in the City of Madison - serving approximately 80-100 homes per year.

6. If awarded federal funds, who will be responsible for monitoring compliance with federal regulations? Please describe the experience of the individual(s) including trainings and/or certifications that the individual(s)/agency has completed and/or attained relevant to federal regulations.

Project Home is uniquely suited for administering rehabilitation and repair programs. Project Home has been administering programs with federal funds for decades. Along with our deep nonprofit experience, we have the expertise as a construction company as well.

During our more than 40 years of successfully operating publicly funded programs, we have developed mechanisms to ensure that the highest quality work is done with the available funds. Our funders require that an annual independent fiscal audit be completed for all programs. The audit confirms that Project Home has strictly adhered to stringent program, procedural, and financial requirements. In addition, our board of directors reviews and approves current activities.

Funders conduct periodic monitoring reviews. Project Home implements any improvements as suggested by funders. Internally, we have developed detailed checklists for each program that help us track customer intake, development of the scope of work, bidding, production progress and inspections.

Lead by our Intake Supervisor, our federally funded programs are administered systematically and carefully to meet the requirements of each individual program. Wyolanda Singleton has led our publicly funded programs for nine years at Project Home with several years of program administration prior to her work at Project Home. Bolstered by expertly trained support team and training of the HOME Implementation training and HUD sponsored online training. Our team regularly attends trainings to keep up on new information, new rules and regulations and all expectations of the programs. The administration of our publicly funded programs is supported by a finance manager with over 20 years of experience with public programs and our field staff supervisors with almost 18 years of construction and program experience.

7. Administration of this program requires knowledge of the City of Madison's Minimum Housing Code and Lead Based Paint Standards. Describe experience, trainings, and/or certifications that the individual(s)/agency have completed or attained.

As previously asserted, Project Home is uniquely suited for administering rehabilitation and repair programs. Project Home has been administering programs with federal funds for decades. Along with our deep nonprofit experience, we have the expertise as a construction company as well.

Project Home staff are trained in the trades as well as our other related nonprofit experience. Our staff must stay up to date on regulations within the trades including local codes, construction regulations, and understand how to meet the needs of a household within such requirements. Our staff hold the credentials to ensure that local codes and stricter program requirements will be adhered to and enforced.

Program Manager: Program coordination and supervision. Adam Weisse has been employed by Project Home for 18 years. Adam has served in several positions of increasing responsibility at Project Home. Adam holds the following certifications: *Lead Risk Assessor, Lead Safe Renovator, BPI Building Analyst, BPI Inspector, Asbestos Supervisor, Asbestos Inspector, Contractor Dwelling Qualifier and State of Wisconsin Notary.*

Field Supervisor: Supervision of field staff and oversight of project contracts; preliminary, interim and final inspections; lead clearance; homeowner education. Steve Coe has been with Project Home for 13 years. Steve holds the following credentials: *Residential Energy Auditor, Lead Safe Renovator, BPI Building Analyst, Asbestos Inspector.*

Rehab Specialist: HQS inspection, lead clearance, field construction activities and project contract development and coordination. Bryan Ott has been employed by Project Home for 15 years. Bryan holds the following certifications: *Lead Risk Assessor, Asbestos Supervisor, Lead Safe Renovator, Asbestos Inspector, BPI Building Analyst, State of Wisconsin Notary and BPI Inspector.*

Home Repair Coordinator: HQS inspection, risk assessor and lead clearance, field construction activities and project contract development and coordination. Bob Weirough has been employed by Project Home for 10 years with 18 prior years of construction experience. Bob holds the following credentials: NARI Master Certified Remodeler, State of Wisconsin Notary, NARI UDGP, Lead Abatement Supervisor, UDC Construction Inspector, Lead Risk Assessor, Dwelling Contractor Qualifier, Asbestos Abatement Supervisor, Housing Quality Standards Specialist, Asbestos Inspector.

PROPOSAL TIMELINE

8. Describe activities/benchmarks by month/year to illustrate how your project will be implemented.

Activity/Benchmark	Estimated Month / Year of Completion
Quarter 4 2022 Recruit and income verify 4-6 households	Quarter4 2022
Quarter 1 2023 Identify 6 additional households and income qualify those households	Quarter1 2023
Quarter 2 2023 have in progress work on 12 households depending on weather and scope of work.	Quarter 2 2023
Quarter 4 2023 have all funds committed to 12 households through signed mortgage and note and have work in progress for those households working toward completion depending on weather and scope of work.	Quarter 4 2023

AGENCY, PROGRAM AND CITY SHARE EXPENSES

Agency & Program:Project Home Inc. - Major Home Repair & Rehabilitation Loan Program

ACCOUNT CATEGORY	City of Madison GPR	City of Madison ESG	City of Madison CDBG-CV	City of Madison Other	Non-City Sources	Total Program Budget
A. PERSONNEL						
Salary			41,500			41,500
Taxes/Benefits			16,250			16,250
Subtotal A.	0	0	57,750	0	0	57,750
B. OTHER OPERATING						
Insurance			1,550			1,550
Professional Fees			125			125
Audit			750			750
Postage/Office and Program Supplies			400			400
Equipment/Furnishings/Depreciation			690			690
Telephone			415			415
Training/Conferences			225			225
Food/Household Supplies						0
Auto Allowance/Travel			150			150
Vehicle Costs/Depreciation						0
Other (Specify):			1,000			1,000
Subtotal B.	0	0	5,305	0	0	5,305
C. SPACE						
Rent						0
Utilities			300			300
Maintenance			700			700
Mortgage Principal/Interest/Depreciation			1,100			1,100
Property Taxes						0
Subtotal C.	0	0	2,100	0	0	2,100
D. SPECIAL COSTS						
Rent Assistance (Rent Arrears, Security Deposit, Application Fee)						0
Utility Assistance						0
Assistance to Individuals (Non-Rent or Utility)			234,845			234,845
Service/Program Subcontracts						0
Other (Specify):						0
Subtotal D.	0	0	234,845	0	0	234,845
TOTAL (A.-D.)	0	0	300,000	0	0	300,000

NOTES: Column D, labeled "City of Madison CDBG-CV," is the proposed budget for the Major Home Repair and Rehabilitation Loan Program, funded by either CDBG or HOME funds. The column header could not be adjusted to reflect this. The Other Operating Costs relate to computer and other contracted services that support the operation of the program and the jobs completed.

STAFFING: Include ALL staff working for the program			
Staff Position Title	Total Program FTE	City-Funded FTE	Roles and Responsibilities
Intake Supervisor	0.20	0.20	client intake assessments and completion reporting
Rehab Specialist	0.45	0.45	project coordination
Finance Manager	0.02	0.02	financial administration of the agency & its programs
Field Supervisor	0.02	0.02	program oversight

REVENUE AND EXPENSE REPORT SUMMARY

CITY OF MADISON
COMMUNITY RESOURCES PROGRAM
APPENDIX IV - PART 1

Name of Agency: Project Home, Inc.

Date of Report:

Period Covered:

Person Completing Report: Kendra Eppler

Telephone: (608) 246-3737

All expenditures must be documented. Only program expenses actually paid out for the period covered may be claimed on this report.

****Only use whole numbers, if using formulas or amounts with cents, convert to whole number before submitting to CDD.**

All Program Expenses	2022 City Allocation	City Portion of Expenses billed this Period	City Portion of Expenses billed Year-to-Date	% of City Budget Spend
A. PERSONNEL	348,390	0	0	0%
B. OTHER OPERATING	43,605	0	0	0%
C. SPACE	13,115	0	0	0%
D. SPECIAL COSTS	344,890	0	0	0%
TOTAL	750,000	0	0	0%

Vendor #:

Contract #:

Budget Adjustments and Method of Reimbursement

1. Agency may alter this budget within 10% of each deliverable by formal notification to assigned Grant Administrator. Changes which would result in modifications in excess of 10% of any original deliverable must receive Community Development Supervisor's written approval prior to contractor commitment of funds.

2. Costs for this project will be reimbursed pending approval by the Community Development Supervisor upon submission of a) a completed program report describing completed activities (Exhibit 3, Program Activity Report) and b) any other reports specified in the agency contract (Exhibit 1, Scope of Services).

3. Any funds not expended by the termination date of the Agreement are not eligible for reimbursement.

INDIVIDUAL PROGRAM EXPENSES

CITY OF MADISON
COMMUNITY RESOURCES PROGRAM
APPENDIX IV - PART 2

Name of Agency:

All expenditures must be documented. Only program expenses actually paid out for the period covered may be claimed on this report.

**Only use whole numbers, if using formulas or amounts with cents, convert to whole number before submitting to CDD.

Pgm Letter	Program Name	Program Expenses	2023 City Allocation	City Portion of Expenses Paid YTD	City Portion of Exp. Billed this Period	City Portion of Exp. Billed YTD	% of City Allocation Spent
A		PERSONNEL	57,750			0	0%
		OTHER OPERATING	5,305			0	0%
		SPACE	2,100			0	0%
		SPECIAL COSTS	234,845			0	0%
		TOTAL	300,000	0	0	0	0%
B		PERSONNEL	95,925			0	0%
		OTHER OPERATING	13,515			0	0%
		SPACE	3,490			0	0%
		SPECIAL COSTS	37,070			0	0%
		TOTAL	150,000	0	0	0	0%
C		PERSONNEL	194,715			0	0%
		OTHER OPERATING	24,785			0	0%
		SPACE	7,525			0	0%
		SPECIAL COSTS	72,975			0	0%
		TOTAL	300,000	0	0	0	0%
D		PERSONNEL	0			0	0%
		OTHER OPERATING	0			0	0%
		SPACE	0			0	0%
		SPECIAL COSTS	0			0	0%
		TOTAL	0	0	0	0	0%
E		PERSONNEL	0			0	0%
		OTHER OPERATING	0			0	0%
		SPACE	0			0	0%
		SPECIAL COSTS	0			0	0%
		TOTAL	0	0	0	0	0%
TOTAL FOR ALL PROGRAMS			750,000	0	0	0	0%

Funding Source	ESG Match Funds YTD	ESG Match Funds this Period
HUD FUNDS (NON-ESG)		
OTHER FEDERAL FUNDS		
STATE GOVERNMENT		
LOCAL GOVERNMENT		
PRIVATE FUNDS		
OTHER/FEES/PROGRAM INCOME		

Project Home, Inc.

Major Home Repair and Rehabilitation Loan Program and Minor Home Repair and South Madison Minor Home Repair Grant Program

Response Submission Due Date: **September 30, 2022 NOON**

INSTRUCTION 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. We ask that you refrain from submitting additional documentation not specifically requested at this time or using alternative formats.

Please use this Word document to record your answers and return this completed document to mdavila-martinez@cityofmadison.com. Please cc: cddapplications@cityofmadison.com

QUESTIONS

Program Design Elements

1. Provide a workflow summary for the major home repair program; include City of Madison's role through the process. For example, the workflow should include the following:
 - a. At what point in the process would Project Home request the closing documents?
 - b. What is the length of time that contractors have to submit their bids (submission deadline)?

First, we (Project Home) ensure the household meets income qualifications for the program. We complete third party income verification on all income sources. Once it is determined that applicants are "income eligible", we alert the city staff for an environmental review and Laredo prescreening (where does this homeowner have mortgages held), and we immediately set up an appointment with applicant for an HQS inspection (housing quality inspection). After the inspection, Project Home (PH) staff write up a work estimate (also a cost estimate to ensure contractor bids are within a proper range). The work estimate includes repairs to bring home up to code and includes homeowner priorities. Any work included on the work estimate must adhere to program regulations as an approved repair (we will not include luxury items in the work write up).

From there, PH obtains title paperwork and an appraisal to determine after-rehab value of the property. While we are obtaining these background documents our field staff will set up a "sub walk". A Sub walk is when the contractors meet with PH staff and the homeowner to have a site visit at the property. This provides an opportunity

for contractors to ask questions, and all receive the same answer at the same time. Project Home keeps a slew of contractors that we have vetted and have approved references and backgrounds. We ensure the contractors have the proper documented credentials and insurance for the work we require. Each of the contractors who is interested will prepare their estimate and send it to the homeowner and a copy to PH. A firm documented due date is set when the sub walk is scheduled. PH usually sets the due date at 2 weeks from sub walk date (could be 3 weeks if a holiday or holiday weekend).

Once the bids are received the PH field tech will meet with the homeowner and review the bids. The homeowner selects the contractor. When the bid is selected PH intake staff will contact City staff for mortgage documents. PH staff will provide background documents as requested and give at least a two week notice that mortgage documents are being requested. When mortgage documents are obtained, PH staff will meet with homeowner to sign and notarize documents. Project Home will file all documents as required with register of deeds and keep copies in client files. This is also the time when PH staff helps homeowner sign their contract with the selected contractor. Work can then begin based on homeowner availability and contractor schedules. All work will be inspected by Project Home field staff during progress plus a final inspection at the end of the project to ensure workmanship and proper technique. All contractor work is warranted for one year in addition to manufacturers warranties.

When the project is completed and has passed the final inspection, Project Home will reconcile the job including all billings, all invoices and final paperwork, this will be submitted to the city for final processing and payment to Project Home.

2. For the proposed minor home repair programs, how many times can an eligible household utilize the program and within what period?

Applicants may use the minor home repair service once per year (from date of completion of previous year) Applicants will receive an inspection of their home each time they use the program services. This inspection helps homeowners decide what work they need done right now and which can wait for a later date and what will fit into their budget.

Applicants have 140 subsidized hours of service they can use in a ten-year period. Project Home keeps "cost to contracts" in client files so we are aware of how many subsidized hours any homeowner has used and how many hours remain.

3. What program materials and services will be offered in languages other than English in order to provide a more inclusive environment for your proposed programs?

Project Home program materials are primarily written in English. We have some materials for our weatherization program in Spanish and Hmong. We have a Spanish interpreter available and we continually seek partnerships where translation services can be supported by the

organizations professional staff. For example: we partnered with WI Council for the Blind for our staff training and their assistance to serve clients who were blind and need support with their paperwork and services. We frequently work with May Lor with MG&E to help with translation and relationship development as help to translate and facilitate services for Hmong speaking households. We value our partnerships as they are an important aspect to being able to serve households that desire these services.

Budget

1. Given the high need in the community for major rehabilitation repairs, does Project Home have the capacity to commit funds and close (not complete the project) on more than 12 homes annually? If so, how many. If not, please describe limitations to increasing the number of homes.

When submitting our proposal, we wanted to quantify the results we could meet within the year. Our team knows that we have the capacity to close at least 12 projects within a year. We have the staffing and infrastructure to close more jobs than we submitted. Our team feels very comfortable to acknowledge that we can reasonably close 25-30 jobs in a years' time given the need in Madison.

2. Project Home's minor home repair program provides a subsidized labor rate of \$15 from what could possibly be up to \$50-75. Elaborate on how Project Home is able to keep the rates low.
 - a. Does the contractor doing the work take a loss?
 - b. How is the difference covered?

Project Home is the only contractor that we use for the minor home repair program. We do not subsidize other contractor work. Our minor home repair program is not all encompassing as we do not have a licensed electrician on staff, nor do we do any professional remodeling. We really focus on maintenance, repairs, safety and preserving housing stock. Project Home receives funding from the City of Madison in two sources. Project Home receives a grant from the city that covers the costs of the staff who are doing the maintenance and repair work on the homes at the costs of about \$50-\$75 dollars per hour. The second source is program income. Homeowners are charged \$15.00 per hour for labor plus the costs of materials for their project. The income collected from homeowners is paid to Project Home. Quarterly, Project Home writes a check to the city which covers all of the labor and materials from the previous quarter. This is called program income. This program income is tracked annually and returned to Project Home in a future year as a part of the funding to cover the minor home repair program. So, the grant from the city pays Project Home up front to do the work for the homeowner and Project Home returns the income to the city. In future funding years the program income offsets the grant the city uses to help Project Home cover staffing costs.