

# MADISON FAMILY SUPPORTIVE HOUSING



Community Development Authority of the City of Madison  
City of Madison  
Request for Qualifications:  
Homeless Supportive Housing  
RFQ No: 4406-0-2014-MRW

**HEARTLAND**  
**ALLIANCE**  
HOUSING

eliminating racism  
empowering women  
**ywca**



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## 1.1 FIRM PROFILE/Team Structure



### **Heartland Housing, Inc.**

*Developer*

**Location:** 208 S. LaSalle St., Suite 1300, Chicago, IL 60604

**Areas of Expertise:** Development, Management and Compliance for: Affordable and Permanent Supportive Housing for Individuals and Families; Housing for Older Adults; Mixed-Income Communities

**Point of Contact**

Hume An, LEED AP / Director of Real Estate Development  
208 S. LaSalle St., Suite 1300, Chicago, IL 60604  
phone: 312-660-1345 / fax: 312-660-1555



### **Heartland Housing, Inc.**

*Property Manager*

**Location:** 208 S. LaSalle St., Suite 1300, Chicago, IL 60604

**Areas of Expertise:**Development, Management and Compliance for: Affordable and Permanent Supportive Housing for Individuals and Families; Housing for Older Adults; Mixed-Income Communities

**Point of Contact**

Kandyse McCoy-Cunningham / Director of Property Management  
208 S. LaSalle St., Suite 1300, Chicago, IL 60604  
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### **YWCA Madison**

*Service Provider*

**Location:** 101 E. Mifflin Street, Suite 100, Madison, WI 53703

**Areas of Expertise:** Supportive Services, Housing and Shelter, Job Training, Transportation, Race and Gender Equality Issues, Advocacy

**Point of Contact**

Rachel Krinsky / Chief Executive Officer  
101 E. Mifflin Street, Suite 100, Madison, WI 53703  
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## HEARTLAND HOUSING, INC.

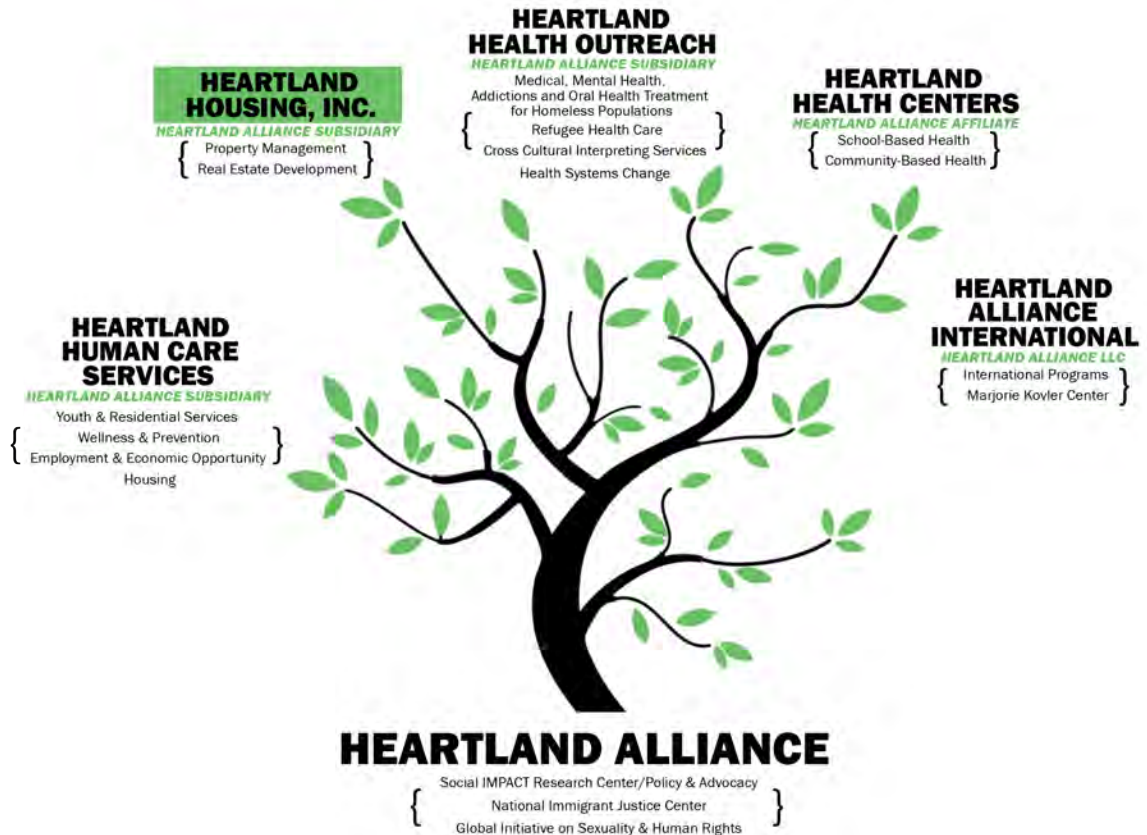
Heartland Housing, Inc. is a leader in developing and managing affordable housing in the Midwest. Heartland Housing has developed over 1,800 units and manages over 900 affordable units across the Chicago region and Midwest since our founding in 1988. Our experience has helped us perfect the art of balancing solid property management with programs that create opportunities for residents. As a result, our work not only sparks community revitalization but also creates stable lives and homes.

As the only housing developer in the city of Chicago to be chosen under all three of Mayor Daley's Supportive Housing Initiatives, Heartland has established itself as a model program for others in the city as well as nonprofits nation-wide. Heartland is committed to providing residents access to appropriate supportive services and promoting tenant involvement in neighborhood activities and programs in order to foster the interdependency necessary to build stable communities.

As a part of a broad service-based organization, Heartland Housing is able to draw upon the expertise of its Heartland Alliance partners to design and deliver integrated housing, social and health services. Heartland Human Care Services (HHCS) and Heartland Health Outreach (HHO) provide many services that are critical to maintaining housing stability in Heartland Housing properties, ranging from case management to mental health services to employment training and placement. We have also partnered with external service providers in Chicago and Milwaukee.

Developing and managing affordable housing and permanent supportive housing requires a thorough understanding of the myriad funding sources available and the knowledge of how to remain in compliance with these funds. Heartland Housing has extensive experience successfully layering multiple sources of development financing on one project. These projects have typically required several sources of funding in addition to tax credits, such as HOME, CDBG, Trust Fund, Federal Home Loan Bank, and Tax Increment Financing. For example, the Leland Apartments used over ten different funding programs in the development budget. Heartland Housing has extensive experience using and remaining in compliance with tax credits and these other funding sources. In addition, three of our tax credit developments were also HOPE VI developments - Roosevelt Square Phases I and II and Jazz on the Boulevard.

There are a total of 50 employees within Heartland Housing, of which six employees and one intern participate in real estate development activities. The remaining employees serve property management, asset management, and compliance functions. Please see Appendix for more information on key staff members.





## YMCA MADISON

Founded in 1909, the YWCA Madison is dedicated to eliminating racism, empowering women, and promoting peace, justice, freedom and dignity for all. To achieve this mission, the YWCA Madison:

### **Advances race & gender equity to create a more just and inclusive community;**

- Eliminating Racism – Racial Justice workshops and trainings teach people how to acknowledge the existence of racism and how to combat interpersonal and structural racism.
- Keeping Kids in School – Restorative Justice keeps students of color engaged in their school communities by reducing suspensions and expulsions.
- Closing the Leadership Gap – Women’s Leadership Initiatives help women develop skills for career advancement while breaking down barriers that prevent them from attaining leadership roles.

### **Helps people find and maintain employment through job training & transportation; and**

- Delivering job training – Employment and training programs help participants find and maintain work with family-supporting wages.
- Getting people to work – Transportation solutions offer people affordable, reliable transportation to and from their jobs.

### **Supports people in housing & shelter.**

- Housing & Shelter programs offer safe, affordable, and supportive housing options on the Capitol Square and throughout the Madison area.
- Ending Family Homelessness – Shelter, housing programs, and case management services give families homes in which to live and grow.
- Housing Single Women – The YWCA Madison is the largest provider of affordable housing for single women in Dane County.

## YWCA MADISON TEAM STRUCTURE

The YWCA Madison provides several housing programs that focus on homeless families and single women as well as low-income families and single women. To provide these services, the YWCA has two departments to support these programs. The Housing Department provides support services and case management while the Operations Department provides property management, Section 42 certifications and building security. In addition to housing staff, the YWCA has an administrative team to help support tax credit applications.

Housing Department - Housing Department staff will work directly with Heartland Housing property management to ensure the success of families in this development. The Housing Director (MSSW and CAPSW), has worked at the YWCA since 2000 and has experience with tax credit requirements and social work programming. The Support Services Director has a degree in sociology and has provided long-term case management for families for over 10 years plus works to address the stigma of mental illness in the African American community. The Third Street Coordinator (BSW and CSW), who provides support services and conducts tax credit certifications for her program, has worked at the YWCA 22 years and is also familiar with tax credit requirements. A family Housing First Case Manager who is bilingual has worked with survivors of domestic violence for the past seven years. All of these staff members have worked with section 42 tax credits as part of leasing units at 101 E. Mifflin Street. In addition to these staff, the YWCA employs several case manager and program coordinators for the community based housing programs. The majority of these staff members have social work backgrounds and many are certified social workers.

Administrative Staff – The CEO has a Master’s Degree in Social Work and is a Licensed Clinical Social Worker. She began as the YWCA Madison CEO in December 2011. Prior to that, she worked in another non-profit working with homeless families. The CEO Supervises the Director Team including the Housing Director, Operations Director, Support Services Director, CFO, Facilities Director and Development Director. The CFO and the Development Director were both involved in the 2009 LIHTC application process and exchange program. The CFO has a Bachelor’s degree in business administration in accounting, 29 years of accounting experience. The CFO has extensive nonprofit accounting experience as a financial manager and as an auditor. Her background includes government grant accounting and compliance, cost allocation, financial statement reporting, and budgeting. The Development Director has worked at the YWCA for twelve years and has six years grant writing experience including several large state and federal grants in addition to the LIHTC process. In a previous role, the Development Director also was involved in the certification process and TracPro management from the 1988 tax credit endeavor. The Facilities Director was also involved in the LIHTC application process through extensive knowledge of facilities management and construction.





## 1.2 FIRM PROFILE/Project Supervisor

### Hume An - Director of Real Estate Development



Hume An will supervise the project manager assigned to the development of a new housing community in partnership with the Community Development Authority. If needed, Heartland will leverage the support of other Heartland Housing staff, including Executive Director, Michael Goldberg, and other real estate development staff.

Hume brings nearly ten years of expertise and experience in affordable housing and community development. He is responsible for overseeing Heartland Housing's real estate development activities in Chicago, Milwaukee, and Madison. Prior to assuming the role of Director, Hume served as lead on a number of projects, including Hollywood House, which won the Polk Bros. Foundation's Affordable Rental Housing Preservation Award in 2011. He was also responsible for overseeing Heartland Housing's two CHA Transformation projects – Roosevelt Square and Lathrop Homes – as well as the historic rehabilitation of Harvest Commons (formerly the Viceroy Hotel) and the development of Town Hall Apartments, one of the Midwest's first affordable LGBT-friendly senior housing developments.

Committed to seeking out innovation, Hume has worked to make environmental sustainability standard practice, advocating for an integrative design process, building commissioning, green certification, and on-site food production to be components of all Heartland's projects moving forward. He is also a LEED AP, a Chicago Conservation Corps Leader, a National Audubon Society Together Green Fellow, and a leader of the Heartland Alliance Green Team. Hume received his Master of Public Policy Degree from Harvard's Kennedy School of Government. Outside of work, he serves as Vice President of the Korean American Community Services (KACS) board of directors.



ROOSEVELT SQUARE



HOLLYWOOD HOUSE



HARVEST COMMONS



MASKANI PLACE



TOWN HALL APARTMENTS

PROJECTS COMPLETED UNDER HUME'S SUPERVISION



## 2.1.1 DEVELOPMENT EXPERIENCE/Obtaining Section 42 Tax Credits

Heartland Housing has been actively involved in the development, completion, and placement in service of 18 projects totaling over 1,800 units of affordable and permanent supportive housing. All but four of these developments have used Section 42 Low Income Housing Tax Credits (LIHTC). Heartland has received LIHTC awards from the Wisconsin Housing and Economic Development Authority (WHEDA), the Illinois Housing Development Authority (IHDA), and the City of Chicago. In four applications to WHEDA, Heartland successfully obtained credits each time. In the 2012 WHEDA round, Heartland's submission for Maskani Place was the only project in the state to receive an allocation of credits under the supportive housing set-aside category. Heartland Housing was again successful in securing an allocation of credits in the supportive housing set-aside category in the 2014 WHEDA round for Madison Supportive Housing. In addition, in October of 2014, Heartland received an allocation of IHDA tax credits for the preservation of Parkwy Apartments, a 90-unit building in Chicago's Lakeview neighborhood.

Heartland's professional asset management department ensures that projects remain in compliance with tax credit requirements after construction. We have established strong relationships with national tax credit syndicators including US Bank, National Equity Fund, Enterprise Community Investment and the Richman Group, and have a strong reputation for closing deals in even the most challenging economic conditions. We have successfully closed on financing every time for which we received an award of LIHTC. The following three case studies illustrate our success closing LIHTC deals.

Please see the appendix for a full list of all our LIHTC deals.

### CASE STUDY MASKANI PLACE



In 2011, Heartland and Community Advocates (CA) of Milwaukee partnered to create one of Milwaukee's first permanent supportive housing projects for families. This partnership was prompted by CA's struggle to find decent affordable housing to meet the needs of larger families.

Heartland applied for LIHTCs in 2012 and was the only project in the state awarded credits in the supportive housing set aside. Though tax credit equity provided most of the required funding, there remained a funding gap of \$750,000 to close, a difficult task in a challenging funding climate. After winning a soft financing award from the city of Milwaukee amounting to just over \$200,000, Heartland looked to the Chicago Federal Home Loan Bank Affordable Housing Program (AHP) to fill the remainder. However, due to large request amount needed to fill the gap, Heartland did not initially receive an award.

In order to close the deal, we worked with our architect and general contractor to make strategic cuts to our construction budget that minimized reductions to the overall scope. With a new gap of just \$250,000, we closed on financing by deferring developer fee, to be paid down if awarded AHP funds from a re-application. Our next application to FHLB was successful, allowing us to deliver much needed quality supportive housing for homeless families while making us whole on our deferred developer fee. In 2013, we completed construction of Maskani Place and began leasing up the building to families. Today, we have achieved stabilized occupancy in the building and currently house and provide services to more than 150 individuals in families.

### CASE STUDY CAPUCHIN APARTMENTS



In 2006, the *Milwaukee Journal Sentinel* investigated the deplorable conditions in which many of city's mentally ill and low-income residents were living, prompting local officials to take a harder look at the housing conditions of its most at-risk residents. Studies of the area's homeless population were initiated, and led to development of Milwaukee's first "10-Year Plan to End Homelessness." The 38 units provided by Capuchin Apartments are a step towards meeting the plan's goal of adding 1,260 permanent supportive housing units by 2020.

A significant challenge to executing the vision of the Capuchin Apartments was securing the needed financing. Heartland Housing was awarded an allocation of Low Income Housing Tax Credits from WHEDA in 2010, but credit pricing that year was significantly lower than past levels as a result of the national economic and housing crisis. In fact, credit pricing was so low at this point that it left a nearly \$1.5M gap in the development budget. Heartland took several measures to close the gap, including strategic value engineering changes to the design and a Tax Credit Assistance Program loan from WHEDA to compensate for low pricing. Local agencies were also drawn upon for assistance and Heartland was able to obtain additional financial support from Milwaukee County, the City of Milwaukee and HUD. As a result, Heartland Housing was able to deliver a quality building substantially as envisioned and make an important step toward the City of Milwaukee's goal to end homelessness.

### CASE STUDY HOLLYWOOD HOUSE



In 2006, concerned about the state of disrepair and numerous code violations of Hollywood House, Chicago alderman Mary Ann Smith contacted Heartland Housing about acquiring and rehabbing the 197-unit senior housing building. While motivated to sell to an operator that would maintain affordability, the owner had set a high acquisition price. The building required significant rehab as it had not had major repairs since its construction in the early 1960s. After discussing the project with both the state and City housing finance agencies, Heartland determined that it would not be competitive for 9% tax credits, and so we decided to pursue 4% tax credits with tax exempt bonds, a much more complicated deal structure than a typical 9% deal. Despite the many challenges, we decided to move forward with the deal because we believe it was important for the building to remain affordable rather than be converted into luxury condos.

Obtaining financing and beginning construction during 2008, at the onset of a major economic downturn, required tenacity. Because 9% credits were not an option, Heartland had to establish a very large Tax Increment Financing (TIF) district to help fill the capital gap, working closely with the alderman through an extensive community process that included 19 different community meetings. Another major challenge was the Low Income Housing Tax Credit market. When we first sought pricing for the project in November of 2007, pricing was about \$1/credit. By the time we closed on financing, pricing was about \$.85/credit. The plummeting bond market at the end of 2008 was also a huge challenge. Our closing date in December 2008 was during one of the worst times on record to sell bonds as there was a far greater supply and far fewer investors than usual.

Surmounting such obstacles took a great deal of coordination and creative value engineering with our architect and general contractor, as well as innovative finance solutions developed in conjunction with our financial team and funders. Today, Hollywood is fully occupied and stabilized, and preserves housing affordability for the seniors who live in its 197 units.

## 2.1.2 DEVELOPMENT EXPERIENCE/Developing Low-Income Multifamily Housing

### LEADER IN AFFORDABLE HOUSING

Founded in 1988 as the community development arm of Heartland Alliance, Heartland Housing, Inc. is one of the first supportive housing developers in the United States. We combine housing development with supportive services to ensure resident housing success. We believe that all people, especially the most vulnerable members of society, are entitled to safe, decent, and quality housing regardless of income, race, class, or sexual orientation. Our values drive us to seek out and execute innovative solutions and best practices enable us to develop high quality, service enriched, and environmentally sensitive housing to help bring stability to our residents' lives and allow them to live with dignity.

In 25 years, Heartland has created over 1,800 units in 18 affordable housing communities. We currently manage over 900 units of quality, safe housing for the most vulnerable in Chicago and Milwaukee. All of our housing communities are based in multi-family rental properties ranging from 24 units to 200 units. Our developments include SRO supportive housing, independent senior housing, family supportive housing and large mixed-income developments, as well as historic rehabs, moderate rehabs and new construction projects. Tools include the spectrum of affordable housing financing tools such as Section 42 tax credits, Historic and Renewable Energy tax credits, Federal Home Loan Bank, HOME/CDBG, TIF and private debt. We house seniors, veterans, people with AIDS, homeless and at risk of being homeless single people and families, formerly incarcerated individuals, and workers, all of whom need an affordable, stable place to call home.



### INNOVATOR OF GREEN DEVELOPMENT



Heartland Housing's focus on expanding the definition of green development is a commitment to our residents, buildings and communities. Recent sustainable features include on-site urban agriculture, geothermal heating and cooling, solarthermal domestic hot water, green roofs, energy monitors for each unit, non-toxic surfaces and finishes, native drought-tolerant landscaping and permeable paving.

Beginning with eco-charrettes and continuing throughout construction and operations, Heartland Housing seeks to implement the highest level of green certification building appropriate for each building's context. Our buildings have achieved LEED for Homes certification at the Gold Level (Prairie Apartments), LEED New Construction at the Silver Level (Town Hall Apartments) and Enterprise Green Communities Certification (Capuchin Apartments, Harvest Commons, and Maskani Place). Our property management continues this commitment to green living with low/non-toxic cleaning materials, support for residents' green living, and attention to lower-energy light fixtures, Energy Saver appliances, and low/no-VOC and/or recycled content floor coverings and paints.

Many of these components help us reduce the long-term operating costs of our properties, increasing our portfolio's financial stability. And, equally important to our mission, they help us create a healthier environment for our residents by providing good indoor air quality, areas to encourage an active lifestyle, and access to fresh produce.

We expect to achieve green certification on all future developments, providing residents with healthy and resource-efficient housing and staff with a healthy work environment.



## STRONG COMMUNITY PARTNER

Our strong partnerships with funders, government agencies, community leaders, non-profit organizations, and private developers help our residents stabilize their lives. Community-driven solutions are important in the work we do. We don't assume we know the challenges of a particular community or how to fix them, but listen to the community to apply our expertise in a tailored way.

We want our buildings to be viewed as anchor assets in each community. They are places where residents are active, engaged community members and we find ways to invite the community into our buildings through art, gardening, and service projects. For example, Weiss hospital in Chicago has been conducting wellness screening and services for the low-income seniors in our Hollywood House property. Boston Consulting Group and BMO Harris Bank each did garden projects as part of service projects. Such partnerships are crucial in helping Heartland Housing work to end poverty and homelessness.

Heartland Housing is proud of the many community organizations with whom we've partnered to bring affordable housing to their neighborhood. From churches to service providers and community centers to elected officials, our partners enable us to tailor our expertise in affordable housing finance and design to meet specific local needs.



## COMMITTED TO INTEGRATED DESIGN



By considering the needs and concerns of future residents and community stakeholders we are able to create healthy, high-functioning housing.

By collaborating with key stakeholders at every level of development, we are able to design buildings that cohesively take into account all of the involved parties' needs, ideas, and fields of expertise. Our process begins with a daylong design charrette to outline objectives and strategies. This session encourages an open flow of ideas, challenges and solutions throughout design development.

In recent projects, following the charrette we have held focus groups of prospective residents to gain feedback on early design plans, empowering them to share key insights that are crucial to the design process. Working with seniors in the development of Town Hall Apartments' design, for instance, led to the re-configuration of the residential units, a design emphasis on certain community spaces, and the inclusion of common areas of different sizes for residents to socialize in as well as be able to host gatherings from a game night to a dinner party. At Maskani Place, working with families of our partner's temporary housing shelter, we rethought the practicalities of life with young children in the design of the building's common areas.

This work with future residents also reminds us that, beyond developing buildings, we are creating homes. Understanding that the aesthetic elements can be just as valuable as the functional aspects in a home, we often continue the community design process to work with local artists and future or current residents to design and install a piece of public art.



Drawing on our position as a leader in affordable housing and our mission to serve the most vulnerable Heartland's portfolio includes multiple permanent supportive housing developments. We have profiled four to illustrate the range of our experience: Prairie Apartments, Roosevelt Square, Jazz on the Boulevard and Maskani Place.



### CASE STUDY PRAIRIE APARTMENTS



In November 2006, Heartland and Guest House of Milwaukee, a well-respected local provider of supportive services for 27 years, partnered to develop our first project in Milwaukee. Prior to the development, the subject property was occupied by a vacant, deteriorating three-story apartment building from the 1960s. The last use of this building was as a detoxification center with clients temporarily living in 55 small “sleeping rooms” with no private cooking facilities and shared dorm-style bathrooms. Furthermore, shortly before the project was conceived, several *Milwaukee Journal-Sentinel* articles highlighted the deplorable living conditions for people with similar circumstances throughout Milwaukee. At that time, Prairie Apartments – a high-quality, well-designed, sustainable and affordable housing project – represented a new cultural model for addressing homelessness and the many disabilities typically associated with this condition.

Prairie Apartments provides on-site case management through The Guest House including any necessary counseling to ensure residents are able to become self-sufficient. Case managers assist residents with referrals to other social services, health care, mental health resources, employment training, access to clothing and food, and benefit assistance. In addition, residents who are consumers of the Milwaukee County Behavioral Health Division (BHD), for which 10 units are designated, will continue to work with a BHD case manager. The County case managers will focus on clinical and medical monitoring, while the Prairie/Guest House case manager focuses on daily living and tenant support.

## CASE STUDY ROOSEVELT SQUARE



Built over two phases, Roosevelt Square is a mixed-income community that includes both income-restricted and market rate units for individuals and families. The development team for this ambitious project included Related Midwest on the for-sale component and Heartland Housing, Inc. on the rental component. All 367 units of affordable rental and public housing were completed in 2008 and additional phases of development are anticipated in the future.

Located in close proximity to the University of Illinois at Chicago, the Illinois Medical District, and the historic Taylor Street neighborhood, Roosevelt Square offers residents several different unit types in 6-flat masonry buildings to accommodate large families and individuals. Units are newly constructed and have modern amenities including central heat, air-conditioning, and energy-efficient appliances.

Many residents at Roosevelt Square are connected to programming from Heartland Human Care Services to provide post occupancy case management services along with employment and asset building initiatives. A primary focus of these programs is to provide counseling to eliminate barriers to employment and create linkages to transitional job programs and direct employment placement opportunities.

Total development costs for rental portion of both phases at Roosevelt Square was approximately \$97 million. The primary development sources include: 9% LIHTC, HOPE VI funds, Federal Home Loan Bank AHP fund, and Illinois Affordable Housing Tax Credit.

## CASE STUDY JAZZ ON THE BOULEVARD



This 137-unit mixed-income development consists of 98 for-sale units and 39 rental units and was completed in 2006 by a development team of Thrush Development Inc. and Granite Development as partners on the for-sale component and Heartland Housing, Inc. on the rental component. One of the first Plan for Transformation mixed-income communities in Chicago, Jazz on the Boulevard has been a catalyst for nearby neighborhood development.

The Jazz on the Boulevard community is well-designed, with masonry buildings, harmonious streetscapes and architecture that seamlessly integrate into Bronzeville's historic greystones and rowhouses. Unit types in the development include 1, 2, and 3 bedroom units that serve individuals and families. All 39 affordable rental units are subsidized by the Chicago Housing Authority (CHA) with 30 designated for CHA residents. The newly constructed units include central heating, air conditioning, new decorating and energy efficient appliances and are within an historic urban neighborhood. Residents have easy reach of the lakefront, Hyde Park and downtown Chicago.

All 39 rental units are managed by Heartland Housing with an area and site manager overseeing all leasing and compliance issues.

Total development costs for the rental component was approximately \$8 million. The primary development sources were: CHA Capital Funds, 9% LIHTC, Illinois Housing and Development Authority Trust Fund and HOME.





# MASKANI PLACE

*Section 42 and Supportive Housing Development Experience - Project Profile*

**HEARTLAND  
ALLIANCE**  
HOUSING

# Maskani Place / Family Supportive Housing

**Among the first of its kind in Milwaukee, Maskani Place represents a bright new oasis for families facing homelessness and barriers to stable housing.**

Opened in January 2014, Maskani Place fills a great need in Milwaukee for homeless families and those at-risk of becoming homeless.

Heartland Housing partnered with the City of Milwaukee and Community Advocates, a local service provider, to create one of Milwaukee's first affordable housing projects for larger Milwaukee families. (In 2011, larger families comprised nearly 25% of shelter residents). The project includes 37 units, on-site supportive services, as well as an outdoor play area and technology center.



## Development Team

**Heartland Housing, Inc.**  
Developer & Property Manager

**Community Advocates**  
Supportive Services Provider

**Engberg Anderson**  
Architect

**Reichl Construction**  
General Contractor

## Building Features

- Highly efficient building envelope and appliances
- Enterprise Green Community Certified
- Secure, keycard entry
- On-site parking
- Community room
- In-unit laundry
- Dedicated supportive services
- Computer / TV center
- Wellness room
- Outdoor play space & garden plots

## Unit/Income Mix

2BR: 9  
3BR: 18  
4BR: 10

60% AMI: 11 units  
50% AMI: 26 units

All units have project based vouchers - households pay 30% of their income for rent

## Funding Sources

- Low Income Housing Tax Credits
- City of Milwaukee Housing Trust Fund
- Property Donation (City of Milwaukee)
- Enterprise Community Partners Green Charrette grant
- FHLB Affordable Housing Program
- BMO Harris construction loan
- Housing Authority of City of Milwaukee (Project Based Vouchers)
- Focus on Energy Incentive Program



## Partners:





# Maskani Place - Project Profile





# Maskani Place - Project Profile



## 2.1.3 DEVELOPMENT EXPERIENCE/**Public-Private Partnerships**

Many of Heartland's developments have been the result of successful public/private joint ventures. Such collaborations are an important part of the work we do. In our experience, public/private joint ventures have taken multiple forms, including: responding to a specific city need through a request for proposal, working with a government agency such as the Chicago Housing Authority to realize a common vision, and partnering with funding agencies to obtain rental subsidies in order to serve those populations most in need.

### CHICAGO HOUSING AUTHORITY (CHA) MIXED INCOME WORK

Heartland is a developer or co-developer on three Chicago Housing Authority (CHA) mixed-income projects: Roosevelt Square, Jazz on the Boulevard and Lathrop Homes. All three developments are part of the CHA's Plan for Transformation, which is aimed at reversing the physical and economic concentration of poverty and physical obsolescence of existing buildings in older public housing developments. For Roosevelt Square, the CHA chose Related Midwest and Heartland to transform the former ABLA Homes into a new 2,400-unit, mixed-income community on Chicago's Near West Side. With each phase of development, the development team enters into a long-term lease for \$1 with the CHA for the underlying development property, and the CHA provides capital and operating subsidy for its public housing units. In addition, the development team has also worked closely with the City to establish a TIF district and obtain TIF funds. A similar arrangement exists at our other two CHA properties – Jazz on the Boulevard, at which we own 39 rental units, and Lathrop Homes, a 1,200-unit LEED-ND Gold development with significant commercial space. Working together with the CHA and the City, we are helping to transform challenged public housing that has concentrated poverty into vibrant mixed income, mixed use developments.

### RENTAL SUBSIDIES

To ensure that we're able to serve populations most in need, Heartland worked hard to secure project-based rental assistance for all three of its Milwaukee properties:

- Prairie Apartments, our first permanent supportive housing project in Milwaukee, has 16 units with project based rental assistance from the Housing Authority of the City of Milwaukee (HACM). An additional 10 units are reserved for individuals receiving services from the Milwaukee County Behavioral Health Division (BHD), for which a rental subsidy is received.
- Capuchin Apartments has 12 units with HUD Shelter Plus Care (S+C) project-based rental subsidy for chronically homeless individuals with a disability. It also has 14 Milwaukee County Behavioral Health Division (BHD) units to serve consumers of the County's Behavioral Health Division. Both

programs are administered by Milwaukee County.

- Maskani Place, our first permanent supportive housing development for families received project based rental assistance from the Housing Authority of the City of Milwaukee (HACM) for all 37 units.
- With the project-based rental subsidies, residents in these units will be responsible for paying up to 30% of their income toward rent. As a result, families and individuals coming from homelessness, with little or no income, will be able to afford living at each development.

Heartland also secured project based subsidies for 100% of its Chicago supportive housing units, including for Harvest Commons, Town Hall, Los Vecinos, Mae Suites and Karibuni.

### CHA Property Rental Assistance (PRA)

- Harvest Commons: This supportive housing project is targeted toward individuals who have experienced homelessness, those at risk of homelessness, and/or have been formerly incarcerated. Property Rental Assistance (PRA), CHA's project based rental assistance program, was critical to housing this population. Heartland successfully obtained PRA for all 89 units.
- Town Hall: Opened in Summer 2014, Town Hall targets a range of very low, low and moderate income seniors (individuals and couples from 30% to 80% of the area median income). All 79 units are subsidized by rental subsidies.
- Hollywood House: 50 PRA units/35 Chicago Low Income Housing Trust Fund Units/12 Housing Choice Vouchers

In addition to these recent PRA projects, we also have project-based subsidies at several of our other Chicago projects:

- San Miguel – 14 PRA units
- Jazz on the Boulevard – 30 Section 8 units
- Parkway – 45 Section 8 units
- Leland – 12 RHI Section 8 units and PRA Section 8 units
- Mae Suites – 39 Section 8 units
- Karibuni – 60 Section 8 units and 12 PRA units



## RESPONSE TO REQUEST FOR PROPOSALS (RFPs)

### CASE STUDY HARVEST COMMONS



In 2008, the City of Chicago put out an RFP for the Viceroy Hotel, a prominent transient hotel originally opened in 1930 that had become a locus of criminal activity and sub-standard living conditions.

Located in the once blighted but rapidly gentrifying Near West Side neighborhood, the building required a major intervention as it represented a barrier to the neighborhood from reaching its full potential. For many years, leaders of the First Baptist Congregational Church (FBCC) advocated with city officials to purchase the Viceroy and convert it to permanent supportive housing. In 2009 Heartland Housing and First Baptist Congregational Church (FBCC) submitted a response to the RFP focused on creating high quality supportive housing that preserved the historic character of the building and incorporated innovative sustainable design. Out of a competitive field of respondents, the City selected Heartland/FBCC as developer and agreed to dispose the property to Heartland for \$1.

Upon the RFP award, Heartland worked closely with the Illinois Housing Development Authority (IHDA), the City, and the Chicago Housing Authority to assemble financing for the project, which included IHDA 9% LIHTC, City TIF, and CHA project-based subsidies. Heartland also worked closely with the City historic landmarks department and the state historic preservation office to ensure the building's design complied with city, state, and federal standards.

Today, the Viceroy has been transformed into Harvest Commons Apartments, a highly green and beautifully restored art-deco building providing deeply affordable housing for those who have recently exited the Illinois prison system and who were formerly homeless. Working together with the City of Chicago, Heartland has transformed what was once a major nuisance into a community asset and a place that the most vulnerable members of society can live with pride and dignity.

### CASE STUDY TOWN HALL APTS.



Once a symbol of police discrimination against the surrounding gay community during the 1970s and 80s, Heartland Housing transformed the historic Town Hall Police Station into Chicago's first Lesbian Gay Bisexual Transgender Queer (LGBTQ)-friendly affordable housing development for seniors. The Town Hall Police Station was decommissioned by the city in 2009 and Heartland Housing's proposal to develop the building into the city's first affordable housing for LGBTQ seniors was accepted in 2011. In planning our response to the City's RFP, Heartland was committed from the beginning to not just meet the goals of the City, but also to exceed them.

Consistent with the City's redevelopment objectives, the Development team envisioned the primary purpose of the development to be the provision of high-quality, affordable housing (79-units) for seniors with a wide range of incomes, from those making 30% of area median income (AMI) to those making 80% of AMI. In addition, Heartland's plans included the development of health-related uses and other senior friendly commercial uses in the form of approximately 4,100 square feet of leasable commercial space to be around medical and wellness services for seniors. We also met the goal of historic preservation and creative reuse of the Town Hall Police Station, reusing it as community space for our service provider and partner, Center on Halsted. Finally, we met calls for well-designed and secure housing, high quality management, and environmental goals, with plans to meet LEED NC Silver. The project was completed by August of 2014 and was fully leased by October 2014.





# TOWN HALL APARTMENTS

*Public Private Partnerships - Project Profile*



# TOWN HALL APARTMENTS / Senior Housing

**A safe, welcoming and affordable place for seniors to call home that embraces and supports its residents regardless of their sexual orientation.**

Town Hall Apartments, the adaptive re-use of the historic decommissioned Town Hall police station and new construction of a six-story residential building, opened in August 2014.

Town Hall Apartments' target community is low-income seniors, particularly long-time residents of Lakeview who have struggled to stay in the neighborhood as much of the once-affordable housing stock has become unaffordable. Additionally, while sexual orientation is not a factor of tenancy, the development team was committed to creating a senior community that welcomes and includes all low-income seniors, including the Lesbian, Gay, Bisexual, and Transgender (LGBT) community.



## Development Team

### Heartland Housing, Inc.

Developer & Property Manager

### Center on Halsted

Supportive Services Provider

### Gensler

Architect

### Power Construction, LLC.

General Contractor

## Building Features

- Spacious community room with kitchen
- Computer lab
- Fitness room
- Outdoor terrace
- Elevators
- Air conditioning
- On-site laundry
- Bike parking
- Close proximity to transit
- LEED NC Silver Certification

## Unit/Income Mix

Studio: 30  
1BR: 49

80% AMI: 4 units  
60% AMI: 40 units  
50% AMI: 35 units

All units have project based vouchers - households will pay 30% of their income for rent

## Funding Sources

- Low Income Housing Tax Credits
- City of Chicago HOME
- Property donation (City of Chicago)
- IL Department of Commerce and Economic Opportunity grant
- Citibank permanent loan
- Citibank construction loan
- Chicago Housing Authority (Project-Based Vouchers)
- Seller Financing

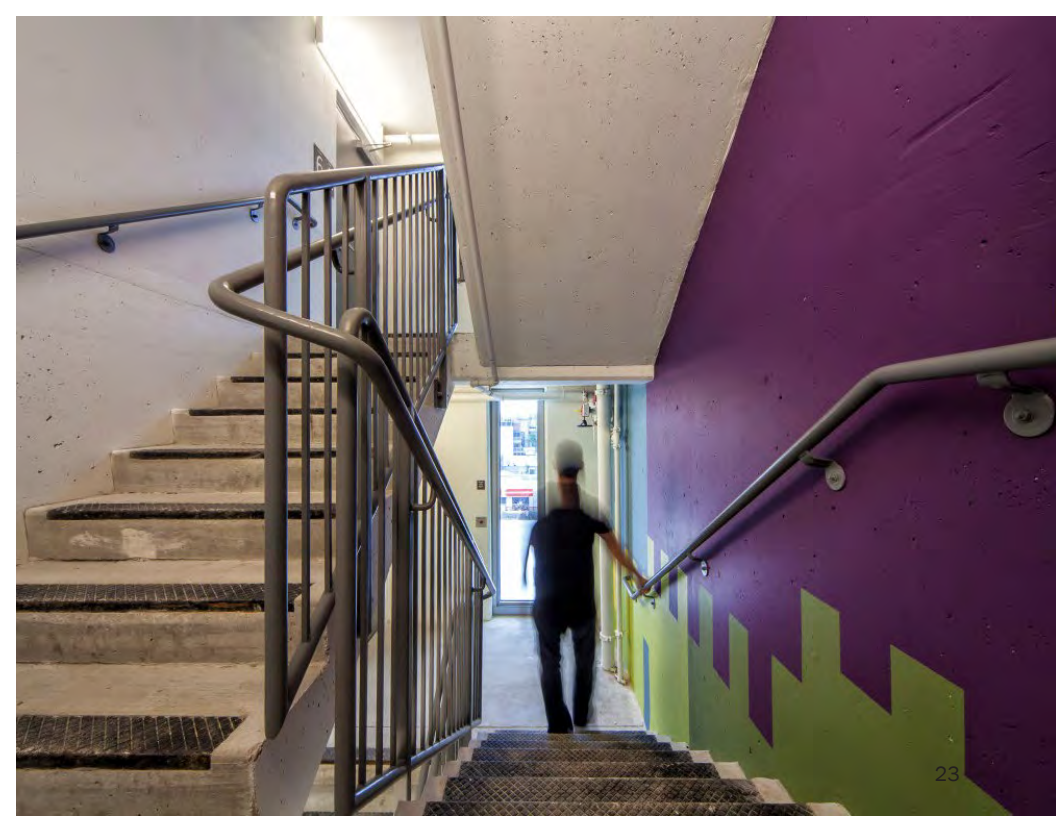


## Partners:





# Town Hall - Project Profile





# Town Hall - Project Profile





## 2.2.1 PROPERTY MANAGEMENT EXPERIENCE/Section 42 Properties

### PROPERTY MANAGEMENT FOR TAX CREDIT PROPERTIES

In our 25-year history, Heartland Housing has been actively involved in the development and operation of 18 housing developments totaling over 1,800 units of affordable and permanent supportive housing. A critical financing component of 12 of these developments was the Section 42 Low Income Housing Tax Credits (LIHTC). HH has repeatedly received LIHTC awards from three allocating agencies: the Wisconsin Housing and Economic Development Authority (WHEDA), the Illinois Housing Development Authority (IHDA), and the City of Chicago. Although a highly competitive application for 9% LIHTC, Heartland Housing has successfully received an allocation in each of our four applications to WHEDA since 2006.

As an experienced operator of LIHTC financed developments, Heartland Housing knows a critical element of using this financial tool is remaining in compliance with its myriad regulations affecting everything from resident qualifications to budgeting, fiscal operation and reporting. This is especially critical given the program's 15 year compliance period. Heartland Housing has the experience, capacity and relationships with allocating agencies and tax credit syndicators to take a development successfully through the compliance period.

All members of the senior property management team are tax-credit certified. Our Director of Property Management was formerly employed by IHDA as a Senior Asset Manager and lead compliance trainer. As the lead trainer, her primary duty was to prepare and provide instruction to property managers throughout the state of Illinois on IHDA requirements and Section 42 compliance. Heartland Housing has full-time asset management staff dedicated to ensuring our developments remain in compliance with the various monitoring agencies and funding sources. Lastly, we've established strong long-term relationships with the asset management departments of all three LIHTC allocating agencies, as well as multiple tax credit syndicators, including US Bank, NEF, Enterprise, Boston Financial, and the Richman Group. Given the importance placed on experience and track record, a testament to our success operating LIHTC properties is the fact that we have repeatedly been awarded and sold tax credits through the same agencies and syndicators.

### CASE STUDY MASKANI PLACE



Our third project in Milwaukee, Maskani Place opened its doors to families in January 2014. This family supportive housing development was among the first of its kind in Milwaukee.

Tenant selection at this 37 unit building was guided by a site-based waiting list developed to provide families who are homeless or at risk of homelessness a priority to access this housing. The development also took names from the waiting list maintained by the Housing Authority of the City of Milwaukee (HACM) as needed to lease up vacant units. During this process, Heartland Housing successfully navigated and adhered to the LIHTC tenancy rules, HACM requirements, and all rules and regulations of the City of Milwaukee, WHEDA and HUD. The project achieved stabilization within three months after achieving full occupancy.

Maskani Place has continued to successfully provide quality supportive housing to families in Milwaukee and expects to continue far into the future. As of October 2014, Maskani Place is 97% occupied (one unit vacant) and the collections rate averages 95%.

These milestones and performance metrics could not have been accomplished without the property and asset management structure that we have at Heartland Housing. Our current structure consists of all application and re-certification processes initiated by our on site manager and reviewed and approved by our asset management department. Annually, our organization's internal auditor tests a sample of files to ensure compliance with the Tenant Selection Plan, Section 42 requirements, and other regulatory agency and lender requirements. In addition, the auditor makes a comparison of electronic and paper files to ensure further accuracy. This check-and-balance approach at all levels of operation enables us to consistently meet our regulatory obligations.

**CASE STUDY**  
**CAPUCHIN APTS.**



In addition to providing quality, safe and affordable housing for residents, the primary objectives of any property management company that manages affordable or supportive housing are achieving financial stability and maintaining compliance (both physical and program requirements) with monitoring agencies, tax credit syndicators, housing authorities and other lenders. In doing so, the manager is helping to ensure this vital resource is available to vulnerable populations and communities for many years. Capuchin Apartments is an example of our commitment to this standard.

Capuchin Apartments is a 38-unit supportive housing development located in Milwaukee, Wisconsin. A Section 42 LIHTC development, Capuchin Apartments is also financed with resources from Milwaukee County and HUD's Shelter Plus Care program. Due to the variety of programs at the development, our Tenant Selection Plan requires that applicants are selected from three different waitlists. Heartland Housing has been able to effectively manage the waitlist and maintain satisfactory ratings on all Management and Occupancy Reviews conducted by WHEDA and our tax credit syndicator (The Richman Group) since its inception.

During the lease-up process, Capuchin was able to surpass pre-established tax credit occupancy requirements by obtaining 100% qualified occupancy within 45 days of opening the development. In addition, the development was able to achieve its critical break-even operations performance metric within a minimal amount of time. Since its inception, Capuchin Apartments has consistently maintained an average occupancy of 97% and collections rate at or above 95%. Work orders are addressed within 48 hours for non-emergency issues and less than 24 hours for emergency situations. Units are made ready for occupancy within 5 days from being vacated in preparation of the next resident.





## 2.2.2 PROPERTY MANAGEMENT EXPERIENCE/Multiunit Low Income Housing

### PROPERTY MANAGEMENT FOR LOW INCOME MULTIUNIT HOUSING

Heartland Housing develops and manages high-quality, affordable housing that meets the community's needs. Our in-house property management team maintains the physical and financial health of our housing communities. We actively manage a portfolio of over 900 units. Our entire portfolio of developed and managed properties consists entirely of multifamily rental projects ranging in size from 24 units to 197 units in a single building. We have also developed large-scale HOPE VI public housing developments that consist of many units in smaller buildings. All of our housing communities serve extremely-low and low-income individuals, with a large portion specifically targeting the formerly homeless.

As a management agent, Heartland Housing, Inc. understands the importance of balanced property management, particularly in developments that aim to house individuals with special needs. Heartland's management model balances the needs of the building's community with the needs of the individual. Unlike typical market-rate housing, challenges common to low-income and homeless households, such as bad credit history or behavioral issues, are not automatic causes for an application denial or for an eviction. Rather, Heartland's property management team works closely with prospective residents and supportive service providers to ensure the development will be a good fit for all stakeholders, and work through resident and community issues that may arise. This approach has been critically important to helping homeless individuals secure and maintain their housing. It has also been critical to the success of our housing developments being viewed as community assets.

Heartland Housing's communities include: permanent supportive housing, affordable housing, mixed-income former public housing, and independent senior living. A few other points about our property management team and experience include:

- Heartland has been managing supportive and affordable housing since 1997.
- Approximately 35 full time employees in Heartland's property management function, with 24-hour on-call emergency management and maintenance services
- Heartland's Property management functions include property management, asset management, compliance, maintenance, janitorial, front-desk service and, in some cases, resident services.
- Professional certifications include Low Income Housing Tax Credits, certified occupancy specialist, fair housing, rent calculation and public housing.

- Director of Property Management certified through IREM's Accredited Residential and Property Management program.
- Develop and maintain waitlist, tenant selection plans, affirmative fair marketing plans and management agreements in compliance with the requirements of City of Chicago Department of Housing, Illinois Housing Development Authority, and Wisconsin Housing and Economic Development Agency.

Our primary mission is housing stability for vulnerable populations. Despite their previous challenges with and obstacles to housing stability, Heartland Housing firmly believes in the strength and ability of our residents to improve their self-sufficiency and quality of life. As such, we promote opportunities for residents to empower themselves and to have some control over the environments they call home.

To accomplish this we have partnered with many different social service providers as appropriate for the population being served. We are excited to partner with YWCA to serve Madison homeless families. Please see appendix for further details on other partnerships.

## HEARTLAND HOUSING LOW INCOME MULTIUNIT HOUSING OF COMPARABLE SIZE

### MAE SUITES



Developed in 1997, this permanent supportive housing development in Chicago's Austin neighborhood has 39 studio units serving homeless individuals. Mae Suites is a blended occupancy development with Section 42 Low Income Housing Tax Credits issued by the City of Chicago Department of Housing and Economic Development, and HOME Funds administered through the Illinois Housing Development Authority. All of the units are subsidized through the HUD McKinney Section 8 Mod-Rehab program. Services are provided by Heartland Human Care Services.

### PRAIRIE APARTMENTS



Developed in 2008, Prairie Apartments provides 24 units of permanent supportive housing to homeless individuals, those with mental illness and the working poor on the Near West Side of Milwaukee. Prairie Apartments received LEED for Homes Gold certification. Prairie Apartments is a Blended Occupancy development with Section 42 LIHTC funds administered and monitored by the Wisconsin Housing and Economic Development Authority, and HOME funds administered by the City of Milwaukee. The rents are subsidized with Section 8 subsidy from the Housing Authority of the City of Milwaukee. Supportive Services are provided by Guest House of Milwaukee.

### CAPUCHIN APARTMENTS



Completed in 2011, Capuchin Apartments provides 38 units of permanent supportive housing to homeless individuals, those with mental illness and the working poor on the Near Northwest Side of Milwaukee. This Section 42 LIHTC development is monitored by the Wisconsin Housing and Economic Development Authority. Supportive and resident services are provided by Guest House of Milwaukee and St. Ben's Community Meal.

### MASKANI PLACE



Maskani Place, open since January 2014, offers permanent supportive housing for homeless families or those at risk of homelessness. Located in Milwaukee's Harambee neighborhood, Maskani Place's 37-units are comprised of two-, three-, and four-bedrooms units. Tax credits were awarded by Wisconsin Housing and Economic Development Agency; the Housing Authority of City of Milwaukee provides the subsidy for this development. Supportive services are provided by Community Advocates.

## 2.2.3 PROPERTY MANAGEMENT EXPERIENCE/Permanent Supportive Housing

### PROPERTY MANAGEMENT FOR FAMILY ORIENTED PERMANENT SUPPORTIVE HOUSING

Heartland is committed to providing residents access to appropriate supportive services and promoting their involvement in building and neighborhood activities and programs in order to foster the independence necessary to build stable lives and communities. At Heartland Housing, we know the nuts and bolts of financing and managing properties, maintaining the financial soundness and overall integrity of our buildings. But we also go beyond the bricks and mortar by providing residents with opportunities to be successful members of their communities. As the only housing developer in the city of Chicago to be chosen under all three of Mayor Daley's Supportive Housing Initiatives, Heartland has established itself as a model program for others in the city as well as nonprofits nation-wide.

Heartland works closely with local partners to provide residents with life skills and tools, such as personal budgeting and employment referrals. Our work with a wide range of individuals and families has taught us how to customize programs and services to best meet the resident's and community's needs. Depending on the population, typical services will vary, but may include: case management, mental health services, job training and placement, financial literacy, substance abuse, and linkages to outside service providers. Funding typically comes from a variety of sources, including Federal, State, County and City sources, as well as through private fundraising. Heartland Housing staff and partners work with residents both before and after move-in day so residents are equipped to be good neighbors. When a resident does experience a crisis, management and service staff intervene and collaborate to de-escalate the situation in partnership with the resident with the ultimate goal of maintaining housing stability.

Heartland Housing successfully developed and continues to manage over 400 units of affordable housing with supportive services. These projects include: the Leland, Mae Suites, Los Vecinos, Kari-buni, Jazz on the Boulevard, Prairie Apartments, Capuchin Apartments, Harvest Commons, Maskani Place, and Town Hall.

### CASE STUDY MASKANI PLACE



At Maskani Place, service provider partner Community Advocates provides on-site case management, social activities and life skill development opportunities as well as linkages to important health care, employment and social services.

Since it began in 1976, Community Advocates has provided a wide array of comprehensive services to the people of Milwaukee. Initially, Community Advocates primarily focused on providing advocacy services to families and individuals assisting them in accessing mainstream benefits. This was a response to many eligible customers being denied access to food, medical benefits, and other necessities. Community Advocates challenged the status quo at Milwaukee County to the degree that the County decided to collaborate with CA to address such issues. This partnership, as well as partnerships with the City of Milwaukee and other State entities, has grown considerably over the past 35 years.

One key advantage to the partnering with Community Advocates at Maskani Place is that residents have access to services from all five Community Advocate divisions: housing, healthcare, disability and utility advocacy. This approach allows case managers to look at the family as a whole and address all issues if possible, not just to address the present issue. In addition, case managers assist residents with referrals to other social services, health care, mental health resources, employment training, access to clothing and food, and benefit assistance that is offered outside of Community Advocates.

Maskani Place is noteworthy for its inclusion of supportive services, but otherwise functions in most ways as a typical apartment building. Residents of the building sign annual leases and have access a fitness room, computer lab, and a community room/kitchen such as might be found in any apartment building. Residents access these amenities as they wish in accordance with the building's operating plan. In addition, residents participate in the supportive services available as needed.



## 2.3.1 SUPPORT SERVICES EXPERIENCE/Case Management Services

### CASE MANAGEMENT FOR CHRONICALLY HOMELESS FAMILIES

The YWCA Madison has a long history of working with homeless families and has provided homeless services since the 1980's. Families served by the shelter program often have experienced multiple episodes of homelessness in their lifetimes. As an extension of that program, the YWCA provides several community based housing programs that also works with homeless families following a Rapid Rehousing and Housing First model. In this model, homeless families are placed in permanent housing as quickly as possible and are provided stabilizing support services to prevent a recurrence of homelessness.

The YWCA also provides quality, affordable housing for individuals who may have few alternatives. To reach this goal, the YWCA has implemented an array of support services assisting tenants in achieving needed residential stability and, whenever possible, necessary linkages with resources and the community at large. The overall goal is to create an environment that allows residents to create a sense of real home.

The YWCA partners with two other agencies to administer a HUD-funded Permanent Housing program, House-ability. House-ability provides long-term supportive housing for households with at least one disabled adult. Recently, this program has prioritized chronically homeless families when there is an opening. In addition, all YWCA staff are required to attend trauma informed care trainings. With this population, it is critical to give the family time to be stable in their home. Case managers must allow time for the family to develop a new routine and be comfortable in their new home. It is important to work with the family to have their basic needs met before starting to work on more serious goals. The foundation of a successful case management relationship is developing trust and rapport. This can be done with consistent follow-through from the case manager.





**YWOMEN LEAD 8-MONTH LEADERSHIP DEVELOPMENT SERIES**





## 2.3.2 SUPPORT SERVICES EXPERIENCE/Family and Individual Services

### AODA, MENTAL HEALTH, AND PHYSICAL DISABILITY SERVICES

The YWCA Madison has been providing housing to vulnerable populations since its inception in 1909. Currently, the YWCA Madison is the largest provider of affordable housing for single women in Dane County. In addition to single women's housing, the YWCA also provides supportive housing for small families and an emergency shelter for homeless families at the 101 E. Mifflin Street location. Outside of the housing facility, the YWCA Madison also supports more than 85 apartments in the community through supportive services and rental assistance following principles of the Housing First Model. Many of the people served in these programs struggle with AODA, mental health, and/or physical disability issues.

Most of the YWCA clients face many barriers to self-sufficiency and have had difficulty maintaining housing. Many have been homeless in the past and face many barriers to self-sufficiency, including unstable work histories and lack of income, poor credit and limited budgeting skills, lack of education, medical, dental, and mental health concerns, substance abuse issues, and/or limited understanding of their rights and responsibilities as tenants. In addition, many of the people we serve have also experienced trauma in their lives, including domestic violence. While most residents are English-speaking, we do have bilingual staff available to assist Spanish-speaking individuals.

Our goal is to provide YWCA clients with affordable housing and the resources they need to successfully maintain housing. Services provided include: identification of needs; advocacy and referral; help in applying for financial assistance programs; budgeting assistance; supportive counseling and assistance in mediation, problem-solving and conflict resolution; service coordination with other agencies; and access to an onsite food pantry and revolving loan fund.

Many YWCA Housing staff members have social work education and many are licensed social workers. YWCA property management and support staff work very closely to help residents maintain housing and give them access to needed services. YWCA staff members are trained in Trauma-informed Care (TIC) and we continue to look for ways to make services more trauma-informed.

Over the many years of providing low-income housing, we have learned much about the needs and preferences of the population we serve. Many of the women living at the YWCA have past histories of trauma (physical or sexual abuse). Residents have consistently reported to us that security is one of their primary concerns. In response, we have 24-hour front desk coverage, we lock our doors at night, and we monitor all visitors in and out of the building. Access to residential floors is limited to tenants and their registered guests.





**HOUSING UNIT AT 101 E. MIFFLIN STREET**



### 3. REFERENCES/Heartland Housing, Inc.

Contact: Martha Brown  
Title: Deputy Commissioner  
Organization: City of Milwaukee, Department of City Development  
Address: 809 North Broadway,  
Milwaukee, WI 53202  
Telephone: (414) 286-5800  
Email: [Martha.Brown@milwaukee.gov](mailto:Martha.Brown@milwaukee.gov)  
Projects: Prairie Apartments (1218 W. Highland Ave., Milwaukee, WI 53233); Capuchin Apartments  
(2502 W. Tamarack St., Milwaukee, WI 53206); Maskani Place (320 E. Center St., Milwaukee, WI 53212)

Contact: David Sheperd  
Title: Commercial Lending Officer  
Organization: WHEDA (Wisconsin Housing & Economic Development Authority)  
Address: 140 S. 1st St., Ste. 200, Milwaukee, WI 53204  
Telephone: (608) 267-1450  
Email: [david.sheperd@wheda.com](mailto:david.sheperd@wheda.com)  
Projects: Prairie Apartments (1218 W. Highland Ave., Milwaukee, WI 53233); Capuchin Apartments  
(2502 W. Tamarack St., Milwaukee, WI 53206); Maskani Place (320 E. Center St., Milwaukee, WI 53212)

Contact: Andrew Mooney  
Title: Commissioner  
Organization: City of Chicago Department of Housing and Economic Development  
Address: 121 N. LaSalle St., 10th Floor, Chicago, IL 60602  
Telephone: (312) 744-4190  
Email: [Andrew.Mooney@cityofchicago.org](mailto:Andrew.Mooney@cityofchicago.org)  
Projects: Harvest Commons (1519 W. Warren Blvd., Chicago, IL 60607), Town Hall Apartments (3600 N.  
Halsted St., Chicago, IL 60613)



### 3. REFERENCES/YWCA Madison

Contact: Carmen Nordness  
Title: Single Family Underwriter  
Organization: WHEDA  
Address: 201 W. Washington Ave., Suite 700, Madison, WI 53703  
Telephone: (608) 267-0608  
Email: carmen.nordness@wheda.com

Contact: Tim Radelet  
Title: Executive Director  
Organization: Movin' Out  
Address: 600 Williamson Street, Madison, WI 53703  
Previous Positions: General Council, WHEDA and Attorney, Foley & Lardner (YWCA's tax credit attorney for 2nd project)  
Telephone: (608) 251-4446  
Email: tr@movin-out.org

Contact: Martha Cranley  
Title: Community Impact Director  
Organization: United Way of Dane County  
Address: PO Box 7548, Madison, WI 53707  
Telephone: (608) 246-4353  
Email: mcranley@uwdc.org

Contact: Heidi  
YWCA Resident  
Contact Via: Hope Swanson, Residence Counselor to protect confidentiality and increase sensitivity  
608-257-1436 option 2, hswanson@ywcamadison.org  
Letter Attached

## 4.1 FINANCIAL INFORMATION/Guarantees

### GUARANTEES

Heartland Housing, Inc. is willing and able to provide construction, tax credit recapture, operating, and other guarantees that are typically associated with LIHTC projects.

A handwritten signature in blue ink that reads "Michael Goldberg". The signature is written in a cursive style with a large, looping "G" at the end.

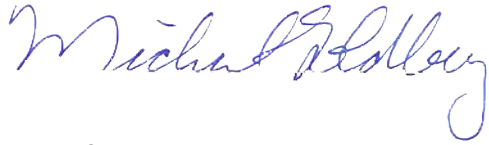
Michael Goldberg, Executive Director  
Heartland Housing, Inc.



## 4.2 FINANCIAL INFORMATION/Availability of Financial Statements

### GUARANTEES

Upon request, Heartland Housing will make its financial statements available.

A handwritten signature in blue ink that reads "Michael Goldberg". The signature is written in a cursive style with a large, looping initial "M".

Michael Goldberg, Executive Director  
Heartland Housing, Inc.

## 4.3 FINANCIAL INFORMATION/Financial/Bank References

### FINANCIAL/BANK REFERENCES

Contact: Karyn Knaak  
Title: Vice President - Community Development Lending  
Organization: U.S. Bank  
Address: 1 S. Pinckney Street, Madison, WI 53703  
Telephone: (608) 252-4202  
Email: Karyn.Knaak@usbank.com  
Projects: Harvest Commons (1519 W. Warren Blvd., Chicago, IL 60607)

Contact: Katherine Mazzocco  
Title: Senior Vice President, Community Development Lending  
Organization: BMO Harris  
Address: 111 W. Monroe Street/2 East, Chicago, IL 60603  
Telephone: (312) 461-2797  
Email: Katherine.Mazzocco@bmo.com  
Projects: Hollywood House (5700 N. Sheridan Rd., Chicago, IL 60660), Maskani Place (320 E. Center St., Milwaukee, WI 53212), Town Hall Apartments (3600 N. Halsted St., Chicago, IL 60613)

Contact: Mark Risch  
Title: Director  
Organization: Citi Community Capital  
Address: Citigroup Global Markets Inc., 1801 California St., Suite 3700, Denver, CO 80202  
Telephone: (303) 308-7401  
Email: Mark.G.Risch@citi.com  
Projects: Capuchin Apartments (2502 W. Tamarack St., Milwaukee, WI 53206), Town Hall Apartments (3600 N. Halsted St., Chicago, IL 60613)

Contact: Carrie Vanderford  
Title: Vice President – Lending Services  
Organization: Forward Community Investments  
Address: 2045 Atwood Ave., Suite 101A, Madison, WI 53704  
Telephone: (608) 204-8837  
Email: carrie@forwardci.org  
Projects: Maskani Place (320 E. Center St., Milwaukee, WI 53212)

Contact: Aron Weisner  
Title: Director, Acquisitions  
Organization: Enterprise Community Investment  
Telephone: (410) 772-2621  
Email: aweisner@enterprisecommunity.com  
Projects: Harvest Commons (1519 W. Warren Blvd, Chicago, IL 60607)



# 5. APPENDIX

# KEY STAFF

## HEARTLAND HOUSING, INC.

Michael Goldberg, Executive Director  
Hume An, Director of Real Estate Development  
Kandyse McCoy Cunningham, Director of Property Management

## YWCA MADISON

Rachel Krinsky, Chief Executive Officer  
Larry Allen, Facilities Director  
LuAnn Quella, Chief Financial Officer  
Torrie Kopp Mueller, Housing Director  
Vanessa McDowell, Support Services Director  
Danielle Dieringer, Operations Director



## Michael Goldberg / Executive Director



Michael Goldberg brings 23 years of professional housing development and community planning experience to Heartland Housing, Inc. Mr. Goldberg joined Heartland Housing in 2003 and for seven years was responsible for managing the development of Heartland Housing's affordable and supportive housing portfolio. In this time Mr. Goldberg and his development team worked to close on financing and construct over 825 affordable housing units, which include HOPE VI development, supportive housing and senior housing. New initiatives begun under Mr. Goldberg's leadership include the expansion of Heartland's work into the collar counties of the Chicago Metropolitan Area and Wisconsin. In addition, Heartland's focus on sustainable development and green architecture have occurred under the leadership of Mr. Goldberg. In October of 2010, Mr. Goldberg was promoted to Executive Director of Heartland Housing, responsible for directing all aspects of the organization.

Mr. Goldberg's past experiences include his work as a senior planner with the consulting firm of SmithGroup JJR in Chicago. In this position Mr. Goldberg helped manage a community planning studio that provided services throughout the Midwest. Mr. Goldberg was also a community planner with the consulting firm of Planning Resources, Inc. Additionally, Mr. Goldberg coordinated housing and planning activities as a staff member for the cities of New York and Chicago. Mr. Goldberg received his Master of Science degree in Urban and Regional Planning from the University of Wisconsin-Madison. He currently serves on the Board of Directors for the Chicago Rehab Network. He recently served on the Permanent Housing Work Group helping to prepare Milwaukee's 10-Year Plan to End Homelessness. Mr. Goldberg was also on the Wisconsin Housing and Economic Development Authority's Tax Credit Advisory Committee.

**HEARTLAND**  
**ALLIANCE**  
**HOUSING**

## Hume An / Director of Real Estate Development



Hume brings nearly ten years of expertise and experience in affordable housing and community development. He is responsible for overseeing Heartland Housing's real estate development activities in Chicago and Milwaukee. Prior to assuming the role of Director, Hume served as lead on a number of projects, including Hollywood House, which won the Polk Bros. Foundation's Affordable Rental Housing Preservation Award in 2011. He was also responsible for overseeing Heartland Housing's two CHA Transformation projects – Roosevelt Square and Lathrop Homes – as well as the historic rehabilitation of Harvest Commons (formerly the Viceroy Hotel) and the development of Town Hall Apartments, one of the Midwest's first affordable LGBT-friendly senior housing developments.

Committed to seeking out innovation, Hume has worked to make environmental sustainability standard practice, advocating for an integrative design process, building commissioning, green certification, and on-site food production to be a component of all Heartland's projects moving forward. He is also a LEED AP, a Chicago Conservation Corps Leader, a National Audubon Society Together Green Fellow, and a leader of the Heartland Alliance Green Team. Hume received his Master of Public Policy Degree from Harvard's Kennedy School of Government. Outside of work, he serves as Vice President of the Korean American Community Services (KACS) board of directors.

**HEARTLAND**  
**ALLIANCE**  
**HOUSING**

## Kandyse McCoy Cunningham / Director of Property Management



Kandyse brings 15 years of experience in Asset and Property Management to Heartland Housing. As the Director of Asset Management, Kandyse oversees the compliance, physical and financial performance of more than 700 units of affordable and supportive housing for low-income Chicagoans. Kandyse has worked with numerous housing programs including tax credits, Section 8, bond financing, mixed income, Section 202 and Section 236 programs. Kandyse is also a member of the Heartland Alliance Risk Management team, assisting in the development and implementation of the organization's response to financial, environmental, and political risk. Prior to joining Heartland, she was a Senior Asset Manager with the Illinois Housing Development Authority. Her formal education consists of a Bachelors of Science degree in Business Management from National Louis University, and a Masters of Business Administration degree, with a specialty in Organizational Development from the Lake Forest Graduate School of Management. In addition to the formal education, Kandyse has received her Accredited Residential Manager (ARM®) and Certified Property Management (CPM®) designations from the Institute of Real Estate Management (IREM); Certified Occupancy Specialist (COS), Tax Credit Specialist (TCS) and Blended Occupancy Specialist (BOS) accreditations from the National Center of Housing Management

**HEARTLAND**  
**ALLIANCE**  
**HOUSING**



## Rachel Krinsky / Chief Executive Officer



Rachel Krinsky holds a Master's Degree in Social Work from the University of Utah and is a Licensed Clinical Social Worker. Krinsky has been the Executive Director of The Road Home Dane County since March 2000. The Road Home has grown exponentially under Krinsky's leadership. Her previous work includes family and school counseling at Briarpatch in Madison and case management services to people with HIV at the Utah AIDS Foundation in Salt Lake City.

**eliminating racism  
empowering women  
ywca**

# HEARTLAND HOUSING DEVELOPMENTS

**Sutherland Apartments:** Developed in 1988, the Sutherland Apartments is comprised of 154 studio and one-bedroom units in Chicago's Kenwood neighborhood. The target population included very low-income individuals on the State of Illinois's General Assistance program, and a limited amount of supportive services were provided on site. This property is no longer in Heartland's portfolio.

**South Shore Limited Partnership:** Developed in 1990, the property has 77 studio and one-bedroom apartments with supportive housing services for formerly homeless and low-income veterans. This property is no longer in Heartland's portfolio.

**Winthrop Towers:** Residents of Winthrop Towers in Chicago's Uptown neighborhood approached Heartland Housing in 1992 to purchase the troubled 280-unit building from the U.S. Department of Housing and Urban Development (HUD), which had foreclosed on the prior owner. Heartland Housing renovated the property in 1994 under an agreement with HUD, in which Heartland agreed to transition the property to resident cooperative ownership. Heartland helped train the residents and sold the property to the United Winthrop Towers Cooperative in 1999.

**San Miguel Apartments:** Located in Chicago's Uptown neighborhood, San Miguel Apartments offers 71 units of supportive housing, including studio, one-bedroom and two-bedroom units.

**Karibuni Place:** Karibuni Place offers studio and one-bedroom units in Chicago's historic Chatham neighborhood. Residents of this 72-unit building are able to take advantage of on-site supportive services.

**Mae Suites:** Developed in 1997, this permanent supportive housing development in Chicago's Austin neighborhood has 39 studio units serving homeless individuals.

**Parkway Apartments:** Providing scarce affordable housing in Chicago's premier Lakeview neighborhood, Parkway Apartments offers 90 studio and one-bedroom units, 45 of which are subsidized through HUD's Project-Based voucher program.

**Los Vecinos:** Developed in 2002, Los Vecinos is a 62-unit permanent supportive housing development in the West Humboldt Park community of Chicago. It serves homeless and low-income individuals

**Leland Apartments:** The Leland Apartments are located in the Uptown community of Chicago. Developed in 2005, the Leland is a 137-unit permanent supportive housing development for low-income and formerly homeless individuals with a dual diagnosis of mental health disability and substance abuse.

**Roosevelt Square I:** Heartland Housing, Inc has a 25% General Partner interest, and Related Midwest has a 75% General Partner Interest in Roosevelt Square I. Developed in 2005, Phase I is the first phase of a HOPE VI-funded redevelopment of a Chicago Housing Authority project and is comprised of 185 units of family housing located on the former ABLA Homes site in Chicago's Near West Side. Former public housing residents benefit from one year of pre- and post-occupancy supportive services.

**Jazz on the Boulevard:** A mixed income community in the Kenwood-Oakland community of Chicago, Jazz on the Boulevard contains a mix of 71 market rate, for sale units, 30 PHA rental, 9 other LIHTC rentals units, and 27 affordable units for sale units.

**Roosevelt Square II:** Heartland Housing, Inc has a 25% General Partner interest, and Related Midwest has a 75% General Partner interest in Roosevelt Square II. Developed in 2007-08, Phase II is the second phase of a HOPE VI-funded redevelopment of a Chicago Housing Authority project and is comprised of 177 units of family housing located on the former ABLA Homes site in Chicago's Near West Side. Former public housing residents benefit from one year of pre- and post-occupancy supportive services.

**Prairie Apartments:** Developed in 2008, the Prairie Apartments provides 24 units of permanent supportive housing to homeless individuals, those with mental illness and the working poor on the Near West Side of Milwaukee. Prairie Apartments received LEED for Homes Gold certification.

**Hollywood House:** Hollywood House, a rehab of an existing senior building, finished work in 2010. Its 197 units serve independent seniors in Chicago's Edgewater community.

**Capuchin Apartments:** Completed in 2011, the Capuchin Apartments provides 38 units of permanent supportive housing to homeless individuals, those with mental illness and the working poor on the Near Northwest Side of Milwaukee. Capuchin Apartments received certification through the Enterprise Green Communities Program.

**Harvest Commons:** Harvest Commons a historic rehabilitation of a dilapidated hotel on Chicago's Near West Side, offers 89 supportive housing units. Harvest Commons redefines "green living", offering residents the opportunity to volunteer in the on-site urban farm, with our resident flock of chickens, and to learn about nutrition and green living. It received Enterprise Green Communities Certification

**Maskani Place:** Maskani Place, opened in January 2014, offers permanent supportive housing for homeless families or those at risk of homelessness. Located in Milwaukee's Harambee neighborhood, Maskani Place's 37-units are comprised of two-, three-, and four-bedrooms units. It received Enterprise Green Communities Certification.

**Town Hall Apartments:** Located in Chicago's Lakeview neighborhood, Town Hall Apartments provides 79 new studio and one-bedroom apartment units for low-income seniors. The project incorporates the adaptive reuse of an historic, decommissioned police station with a new construction residential mid-rise. Center on Halsted will provide on-site supportive services to building residents.

**Madison Supportive Housing:** Expected to be completed in 2016, the Madison Supportive Housing project will serve 60 individuals, most of whom have a history of chronic homelessness. In partnership with Heartland Health Outreach, a full range of supportive services will be offered on-site to help residents overcome persistent obstacles to maintaining stable housing.



# HEARTLAND HOUSING AFFORDABLE COMMUNITIES



Karibuni Place



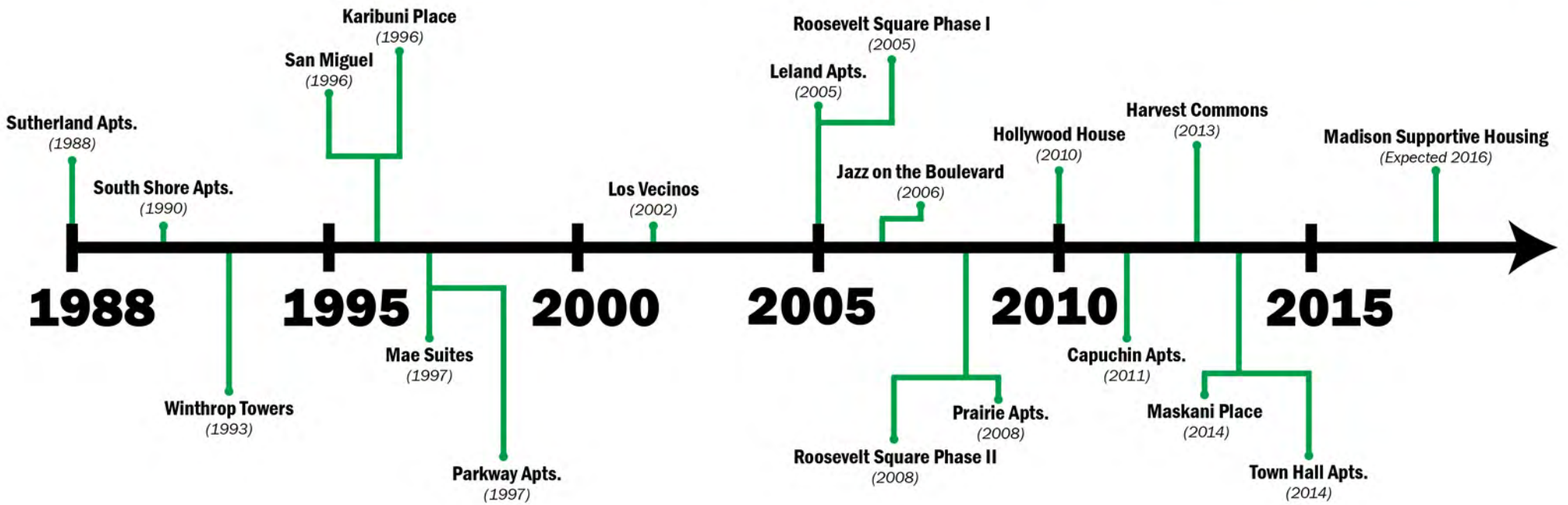
Los Vecinos



Hollywood House



Harvest Commons



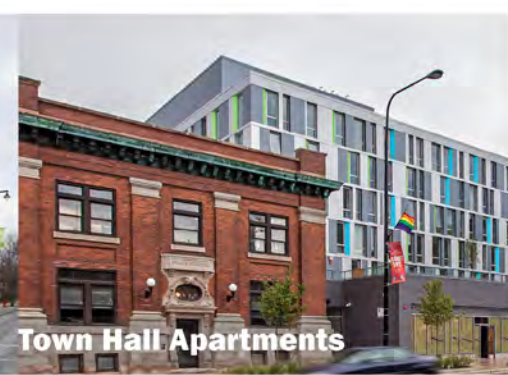
Mae Suites



Jazz on the Boulevard



Capuchin Apartments



Town Hall Apartments



# Our Portfolio

**18**

total developments



**1800+**

units of affordable housing



**900+**

currently under management



# Heartland LIHTC Properties

Property Name	Units	Population	Section 42 Low Income Housing Tax Credits	Year Completed	Status	Total Development Costs
Mae Suites	39	Single Adults	9% IHDA Tax Credits	1997	In Operations	\$2.8 million
Los Vecinos	62	Single Adults	9% City of Chicago Tax Credits	2002	In Operations	\$6.8 million
Leland Apartments	137	Single Adults	9% IHDA Tax Credits	2005	In Operations	\$14.7 million
Jazz on the Boulevard	62	Adults, Families	9% City of Chicago Tax Credits	2006	In Operations	\$7.8 million
Roosevelt Square Phase 1	181	Adults, Families	9% IHDA Tax Credits	2006	In Operations	\$43.1 million
Roosevelt Square Phase 2	185	Adults, Families	9% IHDA Tax Credits	2008	In Operations	\$53.9 million
Prairie Apartments	24	Single Adults	9% WHEDA Tax Credits	2009	In Operations	\$4.7 million
Hollywood House	197	Senior Citizens	4% IHDA Tax Credits	2010	In Operations	\$32.9 million
Capuchin Apartments	38	Single Adults	9% WHEDA Tax Credits	2011	In Operations	\$7.3 million
Harvest Commons	89	Single Adults	9% IHDA Tax Credits	2013	In Operations	\$22.3 million
Maskani Place	37	Families	9% WHEDA Tax Credits	2014	In Operations	\$10.1 million
Town Hall Apartments	79	Senior Citizens	9% City of Chicago Tax Credits	2014	In Operations	\$26.7 million
Madison Supportive Housing	60	Single Adults	9% WHEDA Tax Credits	Anticipated 2016	In Predevelopment	TBD
Parkway Apartments	90	Single Adults	9% IHDA Tax Credits	Anticipated 2017 (Originally purchased and rehabbed by Heartland in 1995)	In Operations, In Predevelopment for Rehab	TBD
Total	1,257					

# Partnering with Social Service Providers

## HEARTLAND HOUSING HAS PARTNERED WITH THE FOLLOWING SOCIAL SERVICE PROVIDERS:

### **Guest House**

*(Prairie & Capuchin Apartments)*

The Guest House of Milwaukee delivers shelter, housing, education and services to Milwaukee's homeless who seek to transform their lives with dignity and purpose. The Guest House takes an integrative approach to move people beyond the cycle of homelessness to break the revolving door phenomenon that has happened for so many in the past. In addition to its work at Prairie and Capuchin Apartments, The Guest House runs a Homeless Shelter and comprehensive services related to education, training, case management, and treatment aspects associated with eradicating homelessness.

### **St. Ben's Community Meal**

*(Capuchin Apartments)*

St. Ben's, a Capuchin Franciscan ministry, has served the homeless and hungry in Milwaukee for over 40 years. A local leader in caring for the most poor and vulnerable, St. Ben's is the local champion and funds and coordinates the provision of supportive services at Capuchin Apartments.

### **St. Leonard's Ministries**

*(Harvest Commons)*

St. Leonard's Ministries (SLM) provides interim housing and supportive services for formerly incarcerated men and women returning to the community from Illinois prisons. Residents are provided with an array of program services designed to assist them as they make the transition to successful, independent living. SLM fills 17 units at Harvest Commons with participants in its programs. In addition, it runs Gracie's Café on the ground floor of the building as a food service training program.

### **Heartland Health Outreach**

*(Leland Apartments & Harvest Commons)*

Based in Chicago, Heartland Health Outreach (HHO), the health care arm of Heartland Alliance, is an established leader in providing affordable, high-quality health care to men, women, and children who would otherwise struggle to address basic health needs. HHO provides culturally competent, multidisciplinary services designed to prevent illness and improve physical, mental and social well-being, and through advocacy that promotes the human right to comprehensive, integrated systems of care. HHO serves residents at the Leland Apartments through its Pathways program and residents of Harvest Commons through its Vital Bridges program.

### **Heartland Human Care Services**

*(Harvest Commons)*

Based in Chicago, Heartland Human Care Services (HHCS), the supportive service provider at Harvest Commons, is the leading direct service human rights organization developing and implementing solutions to the toughest societal challenges in metropolitan Chicago, the Midwest and, on select issues, the nation. HHCS provides a wide array of services for residents at Harvest Commons. Case management services include assessment, engagement, service planning and goal setting, crisis intervention, substance use services, linkages to workforce development and asset development services as well as mental health services - all geared toward the goal of maintaining housing stability and increasing self-sufficiency.

### **Community Advocates**

*(Maskani Place)*

Community Advocates (CA) has been providing a wide array of basic needs social services to homeless and low-income families for the past 35 years. CA has partnerships with Milwaukee County and the City of Milwaukee to provide a host of homeless prevention services. These services include, but are not limited to, security deposit assistance, landlord tenant mediation, case management, and as mentioned earlier homeless prevention. CA also provides housing relocation and stabilization services, rental assistance and landlord/tenant mediation, and recently shelter services.

### **Center on Halsted**

*(Town Hall Apartments)*

Center on Halsted (COH) is the Midwest's most comprehensive community center dedicated to advancing community and securing the health and well-being of the Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ) people of Chicagoland. Heartland partnered with Center on Halsted on the development; COH's knowledge of LGBTQ seniors and community issues as well as its existing relationships and resources will translate into meaningful programs and relationships with the seniors at Town Hall. Currently, COH operates a successful SAGE program, which serves nearly 700 seniors each year and focuses on improving the quality of life for seniors in the LGBTQ community by providing services based upon well-established models of care. This program will expand to serve the seniors at Town Hall Apartments.



# EXPERIENCE/Awards

## Awards

- Harvest Commons: Affordable Housing Finance Magazine's 2013 Readers' Choice Awards for the Nation's Best Affordable Housing Developments – Winner in the Green category
- Harvest Commons: 2013 J. Timothy Anderson Award for Excellence in Historic Preservation for the National Housing and Rehabilitation Association – Winner in Most Innovative Adaptive Reuse category and Finalist in the Judges Award: Achievement of Sustainability category
- Harvest Commons: 2013 AIA Chicago Citation of Merit in the Distinguished Buildings Award category
- Hollywood House: LISC's 2011 Chicago Neighborhood Development Awards – Winner of the 2011 Polk Bros. Foundation Affordable Rental Housing Preservation Award
- LISC's 2006 Chicago Neighborhood Development Awards – Winner of the Non-Profit Neighborhood Development Group of the Year
- The Saint Joseph The Worker Award from the Evangelical Catholic Bishop for the Diocese of the Northwest – November 2, 2013. For our work to end homelessness.
- Prairie Apartments: 2009 WCREW Showcase Vision Award winner
- Prairie Apartments: Wisconsin Builder 2008 Top Project Award winner

## Green Certifications

- Enterprise Green Communities for Harvest Commons, Capuchin Apartments
- LEED for Homes Gold for Prairie Apartments
- Pending: Enterprise Green Communities for Maskani Place and LEED NC Silver for Town Hall Apartments
- It is Heartland's goal to achieve green certification on all future developments, providing residents with healthy and resource-efficient housing and staff with a healthy work environment.







# HARVEST COMMONS

*Sustainable Development - Project Profile*



# HARVEST COMMONS/Supportive Housing

**Formerly one of the worst transient hotels in Chicago, Harvest Commons has been transformed into a place of new beginnings and hope.**

Harvest Commons, the rehabilitation of an historic Art Deco hotel on the Near West Side, offers residents bright, efficient studio units to call home. Harvest Commons redefines “green living”, offering residents the opportunity to volunteer in the on-site urban farm, with our resident flock of chickens, and to learn about nutrition and green living from our partners Heartland Human Care Services and Heartland Health Outreach. Additional building amenities include the restored historic lobby, on-site supportive service staff, computer lab, laundry, bicycle storage, and Gracie’s Café, a social enterprise coffee shop. Harvest Commons is close to multiple retail options, Union Park, and public transit. Units feature full kitchens and baths, and are partially furnished with a twin bed and chair.

## Development Team

### Heartland Housing, Inc.

Developer & Property Manager

### First Baptist Congregational Church

Development Partner

### Heartland Human Care Services, Heartland Health Outreach & St. Leonard’s Ministries

Supportive Services Provider

### Landon Bone Baker

Architect

### Linn Mathes, Inc.

General Contractor

## Unit/Income Mix

Studio: 89

60% AMI: 80 units

30% AMI: 9 units

All units have project based vouchers - households will pay 30% of their income for rent

## Building Features

- Restored historic lobby area
- On-site property management and supportive services
- Computer lab
- Teaching kitchen
- On-site laundry
- Urban farm
- Bicycle storage
- Social enterprise coffee shop
- Enterprise Green Communities Certification

## Funding Sources

- Low Income Housing Tax Credits
- Historic Preservation Tax Credits
- Property donation (City of Chicago)
- IL Department of Commerce and Economic Opportunity Grant
- Tax Increment Financing
- Enterprise Community Loan Fund
- Chicago Housing Authority (Project Based Vouchers)
- Seller Financing



## Partners:

FIRST BAPTIST CONGREGATIONAL CHURCH

ST. LEONARD'S  
MINISTRIES

Enterprise

CHA  
CHICAGO HOUSING  
AUTHORITY

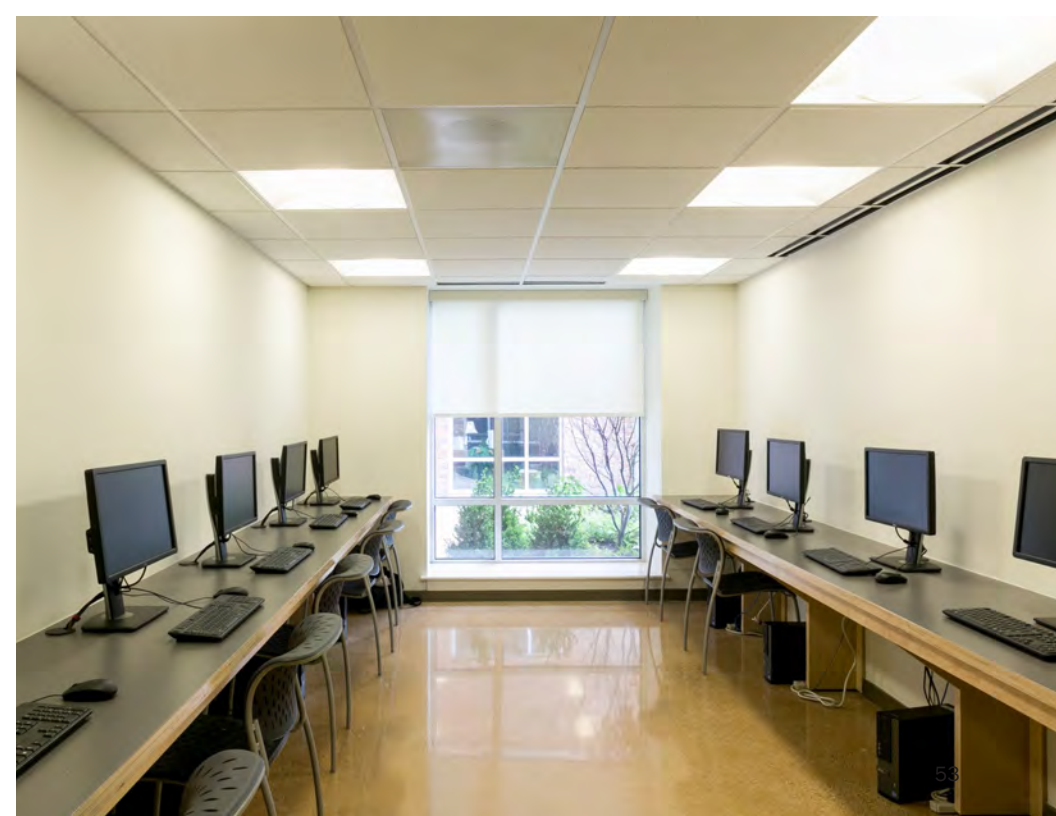
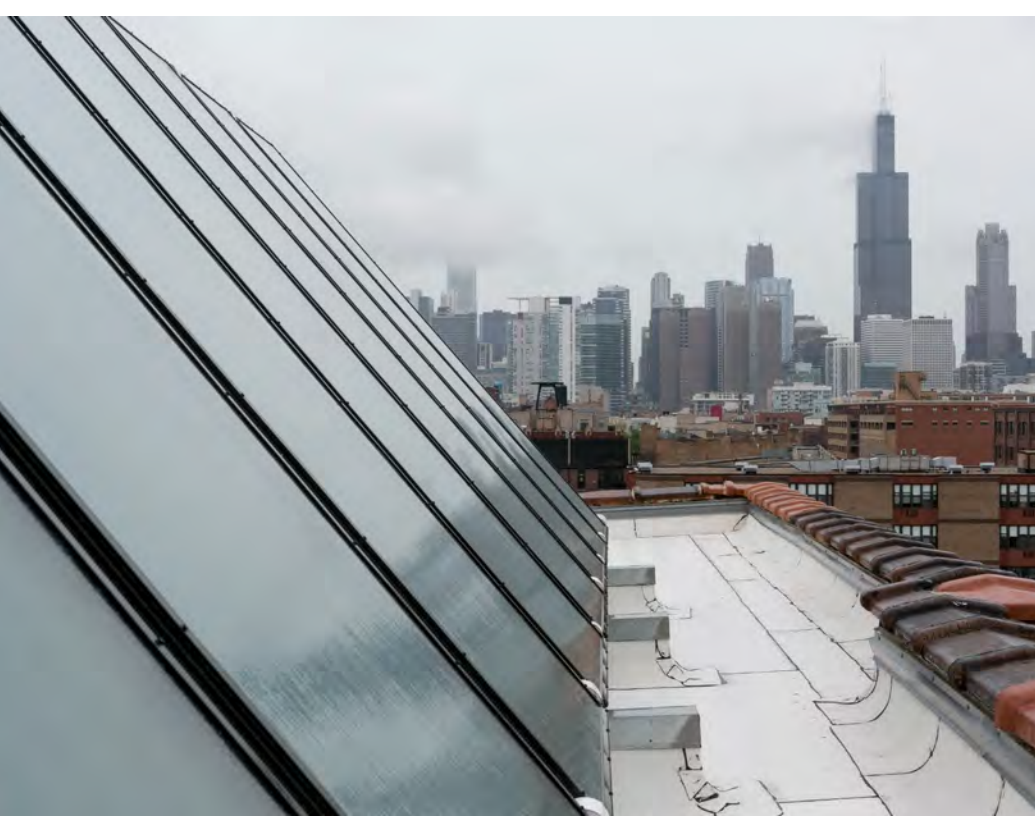


LANDON BONE BAKER ARCHITECTS





# Harvest Commons - Project Profile





# Harvest Commons - Project Profile



# LETTERS OF SUPPORT





DEPARTMENT OF PLANNING AND DEVELOPMENT  
CITY OF CHICAGO

Friday, Oct. 24, 2014

Natalie Erdman, Executive Director  
Community Development Authority of the City of Madison  
Madison Municipal Building, #312  
215 Martin Luther King Jr. Blvd.  
Madison, WI 53703

Dear Ms. Erdman,

I'm writing to express the Chicago Department of Planning and Development's satisfaction in the residential developments for which we have partnered with Heartland Housing.

While Heartland's work in Chicago is well established, I was pleased to personally participate in the organization's \$22.3 million "Harvest Commons" rental project that rehabilitated a landmark SRO hotel in to 89 low-income studios with on-site social services, as well as a \$26 million, 79-unit, LGBTQ-friendly affordable senior housing development that includes the adaptive re-use of a landmark police station. Both of these projects involved several forms of City assistance, including land sales, tax credits, loans and grants, and both are vital parts of our five-year housing plan.

We are pleased with Heartland Housing's track record of providing quality, affordable housing for our residents, and we are confident in the organization's ability to undertake and successfully complete projects of this scope.

Feel free to contact me with any questions about Heartland's work in Chicago.

Sincerely,

Andrew J. McDoney  
Commissioner



**Department of City Development**  
City Plan Commission  
Redevelopment Authority of the City of Milwaukee  
Neighborhood Improvement Development Corporation

**Rocky Marcoux**  
Commissioner  
rmarco@milwaukee.gov  
**Martha L. Brown**  
Deputy Commissioner  
mbrown@milwaukee.gov

October 27, 2014

Ms. Natalie Erdman, Executive Director  
Community Development Authority of the City of Madison  
Madison Municipal Building, Room 312  
215 Martin Luther King, Jr. Blvd.  
Madison, WI 53703

Dear Ms. Erdman:

I understand that Heartland Housing, Inc. has responded to the City of Madison's request for qualifications seeking a developer permanent supportive housing development to serve chronically homeless individuals. As Mayor Tom Barrett's liaison to the Milwaukee City/County Commission on Supportive Housing, I am writing to share information about Heartland Housing's performance with three local supportive developments.

The City and County of Milwaukee embarked on a supportive housing development initiative in 2008; a dozen buildings housing with just over 450 units have been developed to date. Heartland Housing has been a key partner in this effort, serving as developer of three permanent supportive housing buildings in Milwaukee: Prairie Apartments, Capuchin Apartments and Maskani Place. Heartland has worked closely with three non-profit organizations (The Guest House of Milwaukee, St. Ben's Meal Program and Community Advocates) to develop these buildings and provide on-site supportive services. City government has partnered with Heartland through provision of financial support and the sale of City-owned land.

Heartland Housing has delivered attractive, high-quality, well-run supportive housing buildings that provide quality living environments for residents who might otherwise be homeless. These developments all contribute positively to the central city neighborhoods in which they are located. The staff is professional, responsive, and knowledgeable. We have been especially impressed by Heartland's response to a most unfortunate incident earlier this year: a fire at one of the developments that resulted in relocation of the residents while repairs were undertaken. Heartland went the extra mile to ensure that its vulnerable tenants were appropriately housed and their needs were provided for during this crisis.

Please do not hesitate to contact me at (414) 286-5810 should you require additional information about Heartland's supportive housing work in Milwaukee.

Sincerely,

Martha L. Brown  
Deputy Commissioner







*A Ministry of the  
Capuchin Province  
of St. Joseph*

## **St. Ben's Community Meal**

1015 N. Ninth Street, Milwaukee, WI 53233  
414.271.0135  
[www.stbenscommunitymeal.org](http://www.stbenscommunitymeal.org)

*Since 1970, Bringing Food to the Table for Milwaukee's Homeless*

October 24, 2015

The Community Development Authority of the City of Madison  
Attn: Natalie Erdman, Executive Director  
Madison Municipal Building, Room 312  
215 Martin Luther King, Jr Blvd  
Madison, WI 53703

Dear Ms Erdman,

I am writing this letter in support of Heartland Housing and their on-going desire to invest in permanent, supportive housing for the chronically homeless. As Executive Director of St. Ben's Community Meal, I have had the privilege of working with the administration and staff of Heartland Housing on a similar project. Together we planned, designed and built a 38 unit facility called the Capuchin Apartments. They are located at 2501 W. Tamarrack Avenue. After extensive planning we were able to occupy the building in September of 2011. It has been fully utilized ever since. Heartland staff have continued their promise of supportive services and care of the building. They opened another facility, here in Milwaukee, this last Summer for homeless families. I believe it has nearly 150 units of affordable housing that are now up and running effectively.

Heartland was very clear in their working with us on: design, development and funding required and built the building as well as manage the complex of the Capuchin Apartments. St Ben's is the local face of the apartments and covers the supportive services. We have had a great working relationship. Together helping 38 formerly homeless, and some mentally challenged, to live a quality and decent life.

I can vouch for the dependability and outstanding partnership Heartland Housing has been with us in terms of affordable housing. They have proven that differing agencies can work together.

They were also respectful in giving us latitude to add our own charism to the Capuchin Apartments. I have found them to be excellent partners in helping us to move beyond our band aid approach to serving the homeless of Milwaukee. I believe if the chance arose we would work with them again on another affordable housing project.

If you need any additional information or have further questions, please do not hesitate to contact me.

Sincerely,

Br Rob Roemer, Capuchin  
Executive Director  
St. Ben's Community Meal  
[roem@thecapuchins.org](mailto:roem@thecapuchins.org)  
414-271-0135 x 15

Br. Rob Roemer, Capuchin • Ministry Director • [roem@thecapuchins.org](mailto:roem@thecapuchins.org)

October 28, 2014

Natalie Erdman  
Executive Director  
The Community Development Authority  
City of Madison  
Madison Municipal Building, Room 312  
215 Martin Luther King, Jr. Blvd  
Madison, WI 53703

Dear Ms. Erdman:

I am once again writing in full support of Heartland Housing's response to your RFQ for services relating to the financing and development of supportive housing. Heartland Human Care Services (HHCS) and Heartland Housing (HH) have been collaborating for 25 years, HH as developer and owner and HHCS as supportive service provider. We work together currently on four permanent supportive housing developments, totaling 262 units. The majority of these units are occupied by formerly homeless individuals and other low-income individuals with significant barriers to housing stability and economic self-sufficiency, including mental illness, substance abuse, physical disabilities, and people living with HIV/AIDS.

Our shared goals are to first provide safe, secure and affordable housing to stabilize the individual and give them the space and tools they need to begin addressing the barriers they have to greater self-sufficiency. Our latest collaboration, Harvest Commons, best exemplifies the level of engagement and commitment to quality that is the hallmark of Heartland Housing. They succeeded in transforming a severely dilapidated community eyesore into a community gem. In the process, they have made available superb living accommodations for 89 low- and extremely low-income households, many of whom until recently were living on the streets. We then provide the residents with social supports necessary to make their housing sustainable.

I urge the Community Development Authority to act favorably on Heartland Housing's application. Should you desire further information on our collaboration, please contact me at 773 336-6002 or at [cdejesus@heartlandalliance.org](mailto:cdejesus@heartlandalliance.org).

Sincerely,



Carlos R. Dejesus Rivera,  
Managing Director of Housing  
Heartland Human Care Services, Inc.



HEARTLAND HEALTH OUTREACH, INC.

October 29, 2014

The Community Development Authority of the City of Madison  
Natalie Erdman, Executive Director  
Madison Municipal Building, Room 312  
215 Martin Luther King, Jr. Blvd  
Madison, WI 53703

Dear Ms. Erdman:

On behalf of Heartland Health Outreach, I am writing this letter in support of Heartland Housing, Inc.'s response to the request for proposals from the Community Development Authority of the City of Madison.

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

HHO has partnered with Heartland Housing, Inc. (HHI) in a program sited at the Leland Apartments, a six-story building owned and managed by HHI on the north side of Chicago. HHO's Pathways Home is a HUD-funded program that occupies two floors of the Leland, providing supportive permanent housing to 50 formerly homeless individuals who have a serious mental illness and a co-occurring substance use disorder. We have worked closely with HHI for more than 12 years to ensure that our participants and the other residents of the building are afforded a dignified, safe community.

HHI understands the importance of balanced property management, particularly in developments that aim to house individuals with special needs. Heartland's management model balances the needs of the community with the needs of the individual. Heartland's property management team works closely with residents, their families, and service providers if applicable, to ensure the development will be a good fit for the resident and to work through resident and community issues that may arise. They also establish relationships with neighborhood associations and the police and fire departments. This network of relationships ensures that HHI developments are



perceived as community assets, while helping residents access community resources they need to improve their economic security and quality of life.

We hope that you will give HHI's application the consideration it deserves.

Sincerely,



Karen Batia, Ph.D.  
Executive Director, Heartland Health Outreach  
Vice President, Heartland Alliance  
4750 N. Sheridan, Suite 449  
Chicago, IL 60640  
773.751.4104  
kbatia@heartlandalliance.org



# United Way of Dane County

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### Agency Representatives

- Shari Kato  
The Rainbow Project, Inc.
- Dora Zolha  
Big Brothers Big Sisters of Dane County

October 29, 2014

To whom it may concern:

The United Way of Dane County supports the partnership of YWCA Madison and Heartland Housing, Inc. as respondents to the City of Madison RFQ #4406-0-2014-MRW. Both organizations have extensive, proven expertise in providing housing for homeless and chronically homeless families.

Central to the mission of United Way is the reduction of family homelessness. The YWCA, in particular, has been a significant partner in that important work.

United Way has funded YWCA Madison to provide services to homeless families since 1993. In the last twelve years, we have also been engaged specially with them as a program design and collaboration partner in several housing programs serving homeless families.

The YWCA provides excellent, wrap-around, individualized case management services for families, helping these families to seek, obtain and maintain stable housing by assisting them to overcome barriers, identify and build upon strengths, and set and reach personal, financial, academic, employment and other goals. The case managers also pay special attention to the needs and well-being of children in the families they serve. The YWCA successfully serves families with complex and multiple barriers including mental health concerns, AODA, and physical disabilities. Many of the families they serve, particularly in the Houseability program, were chronically homeless prior to program participation.

In addition to their direct work with families the YWCA also coordinates partnerships for a variety of housing programs, acting as the central hub for screening and placement of families, recruitment and relationships with landlords and housing search. They work well with a variety of housing service providers, landlords, and other service providers in the community and have a strong reputation both for service and for partnerships.

We are tremendously interested in increasing the amount of housing options available for very low income families in our community. As such we highly recommend the YWCA Madison as the Social Service provider for this proposed housing project.

Sincerely,  
Martha Crifley  
Director of Community Impact and Strategic Communications

**Timothy J. Radelet**  
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October 29, 2014

Community Development Authority of  
 the City of Madison  
 c/o The YWCA of Madison

Re: Recommendation of **The YWCA of Madison**  
Homeless Supportive Housing, RFO No: 4406-0-2014-MRW

Ladies and Gentlemen:

I am happy to write this letter of recommendation in support of The Young Women's Christian Association of Madison, Wisconsin, Inc. My understanding is that the YWCA is joining with Heartland Housing Inc. in submitting to the CDA a proposal in response to the Request for Qualifications issued by the CDA and referenced above.

Suffice it to say that the YWCA is among the most sophisticated and experienced operators of low-income housing that I have ever worked with in my more than 34 years as an attorney practicing in the areas of development and financing of such housing.

The YWCA staff has deep knowledge about compliance with government requirements. On top of all this, the YWCA operates complex and needed programming in addition to low-income housing, including a homeless shelter, its Third Street program for first-time mothers and their children, job training, and service coordination for residents living with cognitive and physical disabilities and other serious health issues and other special needs. It is a unique and excellent organization.

My experience with the YWCA goes back more than 20 years. I was then a partner in the law firm of Foley & Lardner LLP. The YWCA was Foley's client. I worked with the YWCA and assisted it in the preparation of its first successful application to Wisconsin Housing and Economic Development Authority for a reservation of low-income housing tax credits. The YWCA successfully partnered with an investor who claimed the credits in return for a substantial equity cash investment in the YWCA's building.

I advised the YWCA again about 5 years ago when it submitted its second successful tax credit application. When the recession made it difficult for any developer to find investors, the YWCA made a brilliant decision to exchange the reserved credits for a grant (almost \$10,000,000) from the U.S. Treasury through WHEDA to finance its rehabilitation. By then I was WHEDA's General Counsel, and I was pleased to see the YWCA successfully navigate the very complex procedures required to qualify for the grant. It was the largest such grant ever made by WHEDA.



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I also worked with the YWCA more than 20 years ago when it submitted its successful application to The State Historical Society of Wisconsin and The National Park Service to have the YWCA building at 101 East Mifflin Street listed on The National Register of Historic Places. This enabled the YWCA to qualify for certified structure historic rehabilitation credits through the IRS. It successfully partnered with investors at that time, and again about 5 years ago, and the investors claimed the credit in exchange for substantial equity cash investments in the YWCA building.

The YWCA also successfully obtained mortgage financing from the City at various times through the years from the City's CDBG, HOME and Rental Rehabilitation loan programs, as well as project-based Section 8 vouchers and other funding. Many of the residents also have regular Section 8 vouchers.

All of these funding sources carry with them complex rules and regulations that the YWCA has successfully mastered and complied with for more than 20 years. To my knowledge, there has never been any default in timely and effectively meeting all of these obligations.

I cannot recommend an organization more highly than the YWCA. Its staff carries out outstanding and much needed work in our community. I strongly recommend that the City accept the YWCA's RFQ proposal. Please let me know if I can provide you with more information about this excellent organization. Thank you for your consideration.

Very truly yours,



Timothy J. Radelet

cc: Danielle A. Dieringer

**TIMOTHY J. RADELET LETTER OF SUPPORT - PAGE 2**

October 28, 2014

To the City of Madison CD1 Health Committee,

I am a 73 year old resident of De YUCA who found shelter here in 1997 when I became "almost homeless," - That is "almost" because a room here was affordable on my SSI disability. I moved into one of the many small single rooms with a relay I cannot describe. I had a ray over my head, the most I could hope for. I don't discuss the support service here that made this not a shelter but a legitimate home. In fact, when I was fortunate to come up on the list for Section 8 housing subsidy, in 1999, I chose to stay here in an apartment rather than look outside De YUCA.

Any time I need assistance making applications, filling out forms, finding services outside the YUCA, I have been able to turn to staff here for help and encouragement. I had severe issues with an ex-husband requiring a harassment injunction from the Court, so my safety was assured here in a way not possible elsewhere.

Although the first sheet 24-7 has assured all of us that no one from the outside come down you without an ID and a pass given at the door and permission granted by the resident.

The YWCA genuinely attempts to maintain a good standard of living by providing activities on 11th floor, a newsletter to let us know what is available. There are also the YW, reminders of the change <sup>(for months)</sup> <sup>with them</sup> Daylight Savings Time, reminders to vote, cheerful messages in our boxes about change or suggestions, and a policy of enforcing a drug free environment with cooperation with the police department and support services in the community. They are very serious about that.

The major renovations gave us the fresh paint & carpeting and appliances I'm not sure I'd have in other low income places. We are also definitely unusual in having maintenance right next in the building all day 5 days a week, so when things go wrong, they are promptly tackled to. What makes fixing is promptly fixed.

The YWCA even provide space in the lobby to accept generous food donations from restaurants and etc. That is a major service.

I feel safe and content here and have never looked out low income housing outside the YWCA.  
Sherrin





**“Heartland Alliance is setting the standard in Milwaukee for providing quality housing to people with special needs. Their deep commitment, expertise, and comprehensive approach provide a great catalyst for change.”**

**Leo Ries, Executive Director, Milwaukee LISC**

