

Application for Neighborhood and Community Development Funds

Applications should be submitted electronically to the CDD by 12:00 p.m. on the first Friday of the month and will be reviewed by the CDBG Committee on the first Thursday of the following month.

Program Title: <u>Truax Park Redevelopment, Phase 1</u>	Amount Requested: <u>\$ 1,025,000</u>
Agency: <u>CDA of the City of Madison</u>	Tax ID/EIN/FEIN: <u>39-6006968</u>
Address: <u>215 MLK, Jr., Blvd., STE. LL-100</u>	DUNS #: <u>137346677</u>
Contact Person: <u>Mark A. Olinger</u>	Telephone: <u>608-266-4635</u>
Email: <u>molinger@cityofmadison.com</u>	Fax: <u>608-267-8739</u>

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

The Truax Park Apartments were constructed in 1948, and received their last major rehabilitation in 1980. In 2009, the CDA applied for and received over \$14 million in Low-Income Housing Tax Credits from WHEDA to make significant improvements to the six (6) buildings included in this application. The proposed actions constitute Phase 1 of the implementation of the adopted Truax Park Master Plan and Site Development Study (2009), a copy of which is attached as Appendix 1.

This project will provide for the complete rehabilitation of seventy-one (71) apartment units. The apartments will be brought up to full accessibility, with the addition of elevators in each building, enhanced energy efficiency, and will maintain their affordability for Truax residents by the addition of 24 Section 8 Project-Based Vouchers (PBVs) which will provide long-term affordability. In addition the CDA and its Construction Manager and sub-contractors have committed to hiring sixteen (16) local residents, some of whom are CDA residents, to work on the project, providing critical employment opportunities for these residents.

The estimated total construction budget, including a 10% contingency, is approximately \$9.3 million. The CDA is requesting a loan of \$1,025,000 in Affordable Housing Trust Funds (AHTF) from the City to help close the gap in project financing caused by market changes in the Tax Credit market. The request is for a loan with a seventeen-year term, with deferral of payments in Years 1 and 2. Level payments would begin in Year 3 as lump sum payments. Interest on the loan would be calculated at the end of the year based on the average earnings of the City's short-term investments of the previous year, plus 25 basis points.

All of the loan proceeds will go towards improving rehabilitation by improving accessibility (from 0% to 100%), increasing unit size, adding community space within the buildings, and increasing energy efficiency, the CDA is addressing important issues that will keep the property occupied and viable for many years to come.

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

The CDA provides housing at Truax Park for low-income, small families (average household size at Truax Park is approximately 3), in decent, safe, and sanitary conditions. Access to a complete range of services is offered by the East Madison Community Center (EMCC) and other service providers. At present, approximately fifty (50) of the seventy-one (71) units are occupied. Of these 50 households the following table provides a sense of the CDA's residents:

Category	Number of Households	As % of Total HHs Remaining
Single Female Head of Household	24	48%
HH with Disabled Family Member	14	28%
African-American	25	50%

Category	Number of Households	As % of Total HHs Remaining
Asian	10	20%
White	15	30%
With Minor Children	44	88%

Federal Income Categories	Less Than Median Income	Family of 3 (Average Family Size at Truax)
Low	< 80% of median	\$57,600
Very Low	< 50% of median	\$36,000
Extremely Low	< 30% of median	\$21,600
Truax Resident Incomes		
Extremely Low Income	41	82%
Income Less than \$10,000	31	62%

Based upon the CDA's tenant mix, the CDA believes that when fully leased, the demographic and socio-economic characteristics of the residents will be very similar to the households who live at Truax Park now.

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

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

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

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

In order to address this information more fully please find attached to this application **Attachments J and K**.

Attachment J will highlight how the Truax Park Project addresses the 2009-2010 Program Funding Framework.

Attachment K will identify how this project meets the eligibility requirements of the new Affordable Housing Trust Fund guidelines.

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

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

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

EXPENDITURES	TOTAL PROJECT COSTS	AMOUNT OF CD REVENUES	AMOUNT OF NON-CD REVENUES	SOURCE OF NON-CD FUNDED PORTION
A. Personnel Costs				
1. Salaries/Wages (attach detail)				
2. Fringe Benefits				
3. Payroll Taxes				
B. Non-Personnel Costs				
1. Office Supplies/Postage				
2. Telephone				
3. Rent/Utilities				
4. Professional Fees & Contract Services				
5. Work Supplies and Tools				
6. Other:				
C. Capital Budget Expenditures (Detail in attachment C)				
1. Capital Cost of Assistance to Individuals (Loans)	\$14,254,017	\$1,025,000	\$13,229,017	LIHTC, WHEDA Gap, CDA Gap, CDA Capital Funds, Other
2. Other Capital Costs:				
D. TOTAL (A+B+C)	\$14,254,017	\$1,025,000	\$13,229,017	

6. Action Plan/Timetable Estimated Month of Completion
(If applicable)

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

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

- Please see attached Project Schedule.
- Please see Attachment L for a copy of the Guaranteed Maximum Price (GMP) Contract for this project.
- Due to the size of the files a copy of the plans are available at the Community Development Office and the Office of the Director – Dept. of Planning & Community & Economic Development. A disk of the specifications is available at the Office of the Director – Dept. of Planning & Community & Economic Development.

Truax Park Apartments Phase 1 Redevelopment Tentative Schedule

ID	Task Name	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
		22	19	17	14	12	9	6	3	1	18	15	12	9	7
1	BUILDING 7														
2	12 HOMES														
3	ELEVATOR ADDITION(S)														
4	BUILDING 10														
5	11 HOMES														
6	ELEVATOR ADDITION(S)														
7	BUILDING 1														
8	12 HOMES														
9	ELEVATOR ADDITION(S)														
10	BUILDING 2														
11	12 HOMES														
12	ELEVATOR ADDITION(S)														
13	BUILDING 8														
14	12 HOMES														
15	ELEVATOR ADDITION(S)														
16	BUILDING 9														
17	12 HOMES														
18	ELEVATOR ADDITION(S)														
19	PROJECT CLOSEOUT														
20	TRAINING														
21	FINAL PUNCH LIST														
22	OWNERS MANUALS														



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

Alder Joe Clausius, District 17, provided the following on the application:

"As the Alder for the area, I am extremely supportive of the Truax redevelopment project. At one time, the Truax apartments were one of the most troublesome areas in the city. Now, thanks to the involvement of Truax residents, the EMCC and the CDA, the complex is a victim of its own success. It is simply worn out. Your approval of an AHTF loan will initially enable 71 units to become ADA compliant with the addition of elevators, enlarged living units and individual laundry facilities. I urge you to support this AFHT loan application."

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

No Complete Attachment A
 Yes Complete Attachment B and C and one of the following:
 D Facilities
 E Housing for Buyers
 F Rental Housing and Proforma

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

No Yes - Complete Attachment G

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

No Yes - Complete Attachment B, C, F, and H

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

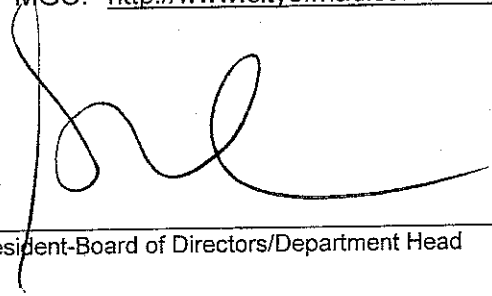
No Yes - Complete Attachment I

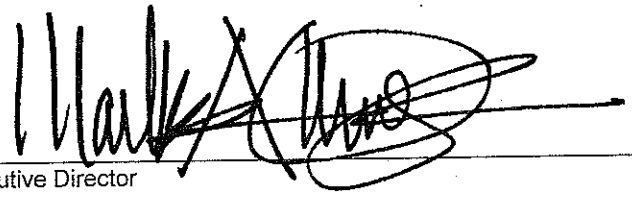
12. This proposal is hereby submitted with the approval of the Board of Directors/Department Head and with the knowledge of the agency executive director, and includes the following:

- | | | | |
|-------------------------------------|---|-------------------------------------|--|
| <input type="checkbox"/> | Future Fund (Attachment A) | <input type="checkbox"/> | Housing for Resale (Attachment E) |
| <input checked="" type="checkbox"/> | Property Description (Attachment B) | <input checked="" type="checkbox"/> | Rental Housing and Proforma (Attachment F) |
| <input checked="" type="checkbox"/> | Capital Budget (Attachment C) | <input type="checkbox"/> | CHDO (Attachment G) |
| <input type="checkbox"/> | Community Service Facility (Attachment D) | <input type="checkbox"/> | Scattered Site Funds Addendum (Attachment H) |
| | | <input type="checkbox"/> | ESG Funding Addendum (Attachment I) |

13. Affirmative Action: If funded, applicant hereby agrees to comply with City of Madison Ordinance 39.02(9) and file either an exemption or an affirmative action plan with the Department of Civil Rights. A Model Affirmative Action Plan and instructions are available at: <http://www.cityofmadison.com/dcr/aaForms.cfm>.

14. Non-Discrimination Based on Disability: Applicant shall comply with Section 39.05, Madison General Ordinances, Nondiscrimination Based on Disability in City-Assisted Programs and Activities. Under section 39.05(7) of the Madison General Ordinances, no City financial assistance shall be granted unless an Assurance of Compliance with Sec. 39.05 is provided by the applicant or recipient, prior to the granting of the City financial assistance. Applicant hereby makes the following assurances: Applicant assures and certifies that it will comply with section 39.05 of the Madison General Ordinances, entitled "Nondiscrimination Based on Disability in City Facilities and City-Assisted Programs and Activities," and agrees to ensure that any subcontractor who performs any part of this agreement complies with sec. 39.05, where applicable, including all actions prohibited under section 39.05(4), MGO." <http://www.cityofmadison.com/dcr/aaForms.cfm>

Signature:  Date: 9/1/10
 President-Board of Directors/Department Head

Signature:  Date: 9/1/10
 Executive Director

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

FUTURE FUND PROPOSAL ONLY

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

COMPLETE IF PROJECT INVOLVES PURCHASE, REHAB, OR CONSTRUCTION OF ANY REAL PROPERTY:
 INFORMATION CONCERNING PROPOSALS INVOLVING REAL PROPERTY

ADDRESS	ACTIVITY (Circle Each Applicable Phase)	NUMBER OF UNITS		Number of Units Currently Occupied	Number of Tenants To Be Displaced?	APPRAISED VALUE:		PURCHASE PRICE (if Applicable)	ACCESSIBLE TO INDIVIDUALS WITH PHYSICAL HANDICAPS?		PRIOR USE OF CD FUNDS IN BUILDING?
		Prior to Purchase	After Project			Current	After Rehab/Construction		Currently?	Post-project?	
1505-1507 Wright St. (Bldg. 1)	Purchase (See Note 1 below.) Rehab Construct	12	12	11	See Note 2 below.			\$307,667	0	12	N
1501-1505 Wright St.	Purchase (See Note 1 below.) Rehab Construct	12	12	10	See Note 2 below.			\$307,667	0	12	N
3502-3506 Straubel St. (Bldg. 7)	Purchase (See Note 1 below.) Rehab Construct	12	12	0	See Note 2 below.			\$307,667	0	12	N
3510-3514 Straubel St. (Bldg. 8)	Purchase (See Note 1 below.) Rehab Construct	12	12	11	See Note 2 below.			\$307,667	0	12	N
3522-3526 Straubel St. (Bldg. 9)	Purchase (See Note 1 below.) Rehab Construct	12	12	11	See Note 2 below.			\$307,667	0	12	N
3530-3534 Straubel St. (Bldg. 10)	Purchase (See Note 1 below.) Rehab Construct	11	11	6	See Note 2 below.			\$307,667	0	11	N

SEE NOTE 3 BELOW

- NOTES:
- The buildings are presently owned by the CDA. Under the transaction the CDA will transfer the buildings to an LLC--in which the CDA is the Managing Member—but will continue to own the underlying real estate.
 - No tenants will be displaced. All residents will be given temporary relocation assistance to other CDA units during construction, and will receive assistance to return to Truax Park when rehabilitation is complete. These temporary relocation expenses are included in the development budget and include: (1) packing the resident's apartment; (2) moving items not needed to temporary secure storage; (3) moving and packing the residents to a temporary location; (4) repacking them when the renovation is completed; (5) moving their belongings back into their permanent unit. Utility costs for the temporary relocation will be paid for by the development budget.
 - A full appraisal of the property has been ordered by the construction lender and is being prepared now. It will be completed prior to closing on the Tax Credits (anticipated closing date October 2010).

CAPITAL BUDGET

TOTAL PROJECT/CAPITAL BUDGET (include all fund sources)

Amount and Source of Funding: ***	TOTAL	Amount	Source/Terms**	Amount	Source/Terms**	Amount	Source/Terms**
Acquisition Costs:							
Acquisition	\$1,846,000					\$1,846,000	CDA Capital Lease
Title Insurance and Recording	7,100						
Appraisal	17,040						
*Predevlpmt/feasibility/market study	28,400						
Survey	17,750						
*Marketing/Affirmative Marketing	15,000						
Relocation	71,000	\$71,000					
Other:							
Construction:							
Construction Costs	7,586,000	5,939,248		\$95,973			
Soils/site preparation	200,000	200,000					
Construction management	492,300	492,300					
Landscaping, play lots, sign	120,000	120,000					
Const interest	213,000	213,000					
Permits; print plans/specs	21,300						
Other: <u>Hard Cost Contingency</u>	850,000	850,000					
Fees:							
Architect	213,000						
Engineering							
*Accounting	50,000	16,450					
*Legal	71,000	71,000					
*Development Fee	1,314,342	1,314,342					
*Leasing Fee							
Other: <u>Financing Fees</u>	303,425	303,425					
Contingency							
Project Contingency:							
Furnishings:	215,000	168,140					
Reserves Funded from Capital:							
Operating Reserve	232,360			232,360			
Replacement Reserve							
Maintenance Reserve							
Vacancy Reserve							
Lease Up Reserve	20,000					20,000	
Other (specify): <u>ACC Reserve</u>	350,000					350,000	
Other (specify):							
TOTAL COSTS:	\$14,254,017	\$9,758,905		\$698,333		\$1,846,000	

* If CDBG funds are used for items with an *, the total cost of these items may not exceed 15% of the CDBG amount.
 ** Note: Each amount for each source must be listed separately, i.e. Acquisition: \$30,000 HOME, \$125,000 CRF.
 *** Identify if grant or loan and terms.

TOTAL PROJECT/CAPITAL BUDGET (include all fund sources)

Amount and Source of Funding: ***	TOTAL	Amount	Source/Terms**	Amount	Source/Terms**	Amount	Source/Terms**
Acquisition Costs:							
Acquisition	\$1,846,000						
Title Insurance and Recording	7,100			\$7,100			
Appraisal	17,040			17,040			
*Predvpmnt/feasibility/market study	28,400			28,400			
Survey	17,750			17,750			
*Marketing/Affirmative Marketing	15,000			15,000			
Relocation	71,000						
Other:							
Construction:							
Construction Costs	7,586,000	\$525,779				\$1,025,000	CDA AHTF Loan
Soils/site preparation	200,000						
Construction management	492,300						
Landscaping, play lots, sign	120,000						
Const interest	213,000			21,300			
Permits; print plans/specs	21,300						
Other: <u>Hard Cost Contingency</u>	850,000						
Fees:							
Architect	213,000			213,000			
Engineering	50,000			33,550			
*Accounting	71,000						
*Legal	1,314,342						
*Development Fee							
*Leasing Fee							
Other: <u>Financing Fees, Contingency</u>	303,425						
Project Contingency:							
Furnishings:	215,000			46,860			
Reserves Funded from Capital:							
Operating Reserve	232,360						
Replacement Reserve							
Maintenance Reserve							
Vacancy Reserve	20,000						
Lease Up Reserve	350,000						
Other (specify): <u>ACC Reserve</u>							
Other (specify):							
TOTAL COSTS:	\$14,254,017	\$525,779		\$400,000		\$1,025,000	

FACILITIES

A. Recap: Funds would be applied to:

___ Acquisition only; ___ rehab; ___ new construction; ___ acquisition and rehab or construction

B. State your rationale in acquiring or improving this space. (i.e., lower costs, collaborative effort, accessibility, etc.)

C. What are the current mortgages or payments on property (including outstanding CDBG loans)?

<u>Amount</u>	<u>Name</u>
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D. If rented space:

1. Who is current owner?
2. What is length of proposed or current lease?
3. What is proposed rental rate (\$/sq. ft. and terms) and how does this compare to other renters in building or in area?

E. If this is new space, what is the impact of owning or leasing this space compared to your current level of space costs?

F. Include:

1. A minimum of two estimates upon which the capital costs are based.
(Be sure to base your labor costs on enforcement of Fair Labor Standards and the payment of Federal Prevailing Wage Rate.)
2. A copy of the plans and specifications for the work, or a description of the design specifications you have in mind.
3. If you own the building: A copy of your long range building improvement plan and building maintenance plan.
(Include a narrative describing what the building needs and how you expect to maintain it over time.)

HOUSING FOR BUYERS

A. Recap briefly the key or unique features of this project:

1. Activities to bring it to housing and code standards:

2. Ways to assure the long-term affordability of the unit? (i.e. Repayment or land use/lease restriction or other special funding features to make it affordable):

B. Provide the following information for owner-occupied properties (list each house or unit):

Table B: OWNER									
Unit #	# of Bedroom	Purchase Price	Amt of CD \$	Use of CD Funds*	Projected Monthly PITI	Household Income Category**	Affordability Period # of Years	Sale Price	Appraised Value

* Refer to 24 CFR 92.206 or 570.202 for such costs as construction, acquisition, architectural engineering services, affirmative marketing, and relocation.

** Less than or equal to 30% of median income, less than or equal to 50% of median, less than or equal to 60% of median, or less than or equal to 80% of median.

C. Describe proposed improvements to increase the level of accessibility:

RESIDENTIAL RENTAL PROPERTY

A. Provide the following information for rental properties:

TABLE A: RENTAL						
Site 1			Site 2		Site 3	
Unit #*	# of Bedrooms	Amount of CD \$	Use of CD Funds	Monthly Unit Rent**	Includes Utilities?	Household Income Category***
080101	2	\$14,230	Rehab	194	Yes, except heat & elec.	30
080102	2	\$14,230	Rehab	160	Yes, except heat & elec.	30
080103	2	\$14,230	Rehab	249	Yes, except heat & elec.	30
080104	2	\$14,230	Rehab	129	Yes, except heat & elec.	30
080105	2	\$14,230	Rehab	379	Yes, except heat & elec.	40
080106	2	\$14,230	Rehab	256	Yes, except heat & elec.	30
080107	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080108	2	\$14,230	Rehab	185	Yes, except heat & elec.	30
080109	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080110	2	\$14,230	Rehab	300	Yes, except heat & elec.	30
080111	2	\$14,230	Rehab	189	Yes, except heat & elec.	30
080112	2	\$14,230	Rehab	379	Yes, except heat & elec.	30
080201	2	\$14,230	Rehab	120	Yes, except heat & elec.	30
080202	2	\$14,230	Rehab	379	Yes, except heat & elec.	40
080203	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080204	2	\$14,230	Rehab	217	Yes, except heat & elec.	30
080205	2	\$14,230	Rehab	379	Yes, except heat & elec.	50
080206	2	\$14,230	Rehab	126	Yes, except heat & elec.	30
080207	2	\$14,230	Rehab	379	Yes, except heat & elec.	60
080208	2	\$14,230	Rehab	379	Yes, except heat & elec.	60
080209	2	\$14,230	Rehab	379	Yes, except heat & elec.	60
080210	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080211	2	\$14,230	Rehab	379	Yes, except heat & elec.	60
080212	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080701	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080702	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080703	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080704	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080705	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080706	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080707	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080708	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080709	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080710	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080711	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080712	2	\$14,230	Rehab	200	Yes, except heat & elec.	60

TABLE A. RENTAL						
Site 1			Site 2		Site 3	
Unit #	# of Bedrooms	Amount of CD \$	Use of CD Funds	Monthly Unit Rent**	Includes Utilities?	Household Income Category***
080801	2	\$14,230	Rehab	200	Yes, except heat & elec.	60
080802	2	\$14,230	Rehab	245	Yes, except heat & elec.	30
080803	2	\$14,230	Rehab	239	Yes, except heat & elec.	30
080804	2	\$14,230	Rehab	164	Yes, except heat & elec.	30
080805	2	\$14,230	Rehab	170	Yes, except heat & elec.	30
080806	2	\$14,230	Rehab	157	Yes, except heat & elec.	30
080807	2	\$14,230	Rehab	213	Yes, except heat & elec.	30
080808	2	\$14,230	Rehab	79	Yes, except heat & elec.	30
080809	2	\$14,230	Rehab	280	Yes, except heat & elec.	30
080810	2	\$14,230	Rehab	120	Yes, except heat & elec.	30
080811	2	\$14,230	Rehab	166	Yes, except heat & elec.	30
080812	2	\$14,230	Rehab	113	Yes, except heat & elec.	30
080901	2	\$14,230	Rehab	379	Yes, except heat & elec.	30
080902	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080903	2	\$14,230	Rehab	193	Yes, except heat & elec.	30
080904	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080905	2	\$14,230	Rehab	200	Yes, except heat & elec.	30
080906	2	\$14,230	Rehab	187	Yes, except heat & elec.	30
080907	2	\$14,230	Rehab	35	Yes, except heat & elec.	30
080908	2	\$14,230	Rehab	171	Yes, except heat & elec.	30
080909	2	\$14,230	Rehab	31	Yes, except heat & elec.	30
080910	2	\$14,230	Rehab	80	Yes, except heat & elec.	30
080911	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080912	2	\$14,230	Rehab	159	Yes, except heat & elec.	30
080001	2	\$14,230	Rehab	200	Yes, except heat & elec.	30
080003	5	\$28,874	Rehab	500	Yes, except heat & elec.	30
080004	2	\$14,230	Rehab	295	Yes, except heat & elec.	30
080005	2	\$14,230	Rehab	200	Yes, except heat & elec.	30
080006	2	\$14,230	Rehab	200	Yes, except heat & elec.	30
080007	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080008	2	\$14,230	Rehab	379	Yes, except heat & elec.	30
080009	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080010	2	\$14,230	Rehab	20	Yes, except heat & elec.	30
080011	2	\$14,230	Rehab	200	Yes, except heat & elec.	30
080012	2	\$14,230	Rehab	187	Yes, except heat & elec.	30

*Units in red are Section 8 Project-Based Voucher Units (PBVs).

**Monthly rents are based upon the the respective household's income. The balance will be made up through either the Annual Contribution Contract (ACC) on Public Housing Units or Housing Assistance Payments (HAP) for PBVs.

***Household Income is based upon the percentage of Average Median Income (AMI) for existing households and estimates based upon new residents at Truax Park.

B. Indicate how the project will demonstrate that the housing units will meet housing and code standards.

The rehabilitation of Truax Park Apartments Phase 1 redevelopment will be managed and overseen by Dimension IV-Madison architects, and McGann Construction (the CDA's Construction Manager), both of which certify that the work on the project will meet all housing and code standards. Plan sets are now being reviewed by the City's Building Inspection Division.

C. Describe briefly your tenant selection criteria and process.

Families who wish to apply for the CDA's Low-Rent Public Housing program must complete a written application form, when the waiting list is open. Applications are available in accessible formats and in Spanish. Applications are accepted by mail or in person. All adult household members must sign release of information, declaration, and consent forms. All information provided by the applicant is verified by the CDA, including information related to family composition, income, allowances and deductions, assets, eligible immigration status, student status, and other factors related to preferences, eligibility, and rent calculation.

An applicant is qualified for Public Housing if at least one member of the household is either a citizen of the U.S. or an eligible immigrant; the applicant family has an annual household income at the time of admission that does not exceed the low income limit for occupancy established by HUD; social security numbers for each member of the applicant household are provided; the head of household is 18 years of age or older, or is an emancipated minor under state law; and the applicant meets suitability criteria established by HUD and the CDA.

Applicants are required to demonstrate the ability and willingness to comply with the provisions of a CDA lease. All applicants must demonstrate, through an assessment of current and past behavior, the ability to pay rent in a timely manner; to care for and avoid damaging the unit, common areas, and the property of others; to create no health or safety hazards, not to interfere with the rights and peaceful enjoyment of others; not to engage in criminal activity or alcohol abuse that threatens the health, safety, or right to peaceful enjoyment of other residents or staff and not to engage in drug-related criminal activity; not to have ever been convicted of manufacturing or producing methamphetamine on the premises of assisted housing; not to contain a household member subject to a sex offender registration requirement; and to comply with necessary and reasonable rules and program requirements of HUD and the CDA;

The CDA will also screen each applicant household to assess their suitability as a renter. Factors to be considered including housekeeping habits, prior history as a tenant, criminal records, the ability of the applicant to maintain the responsibilities of tenancy, and whether the conduct of the applicant in present or prior housing has been such that admission to the program would adversely affect the health, safety, or welfare of other residents, or the physical environment, or the financial stability of the Public Housing project.

The CDA's Public Housing waiting list is maintained in order of preference and by date and time sequence. The CDA uses a residency preference for families who live, work, or have been hired to work or who are attending school or are participating in training programs in the City of Madison. The CDA gives preference to families with minor children, elderly families, and disabled families. The CDA also gives preference to those who are homeless or are a victim of domestic abuse. All preferences must be verifiable and a preference does not guarantee admission to the program.

The CDA will monitor its admission to ensure that at least 40 percent of families admitted to Public Housing each fiscal year have incomes that do not exceed 30 percent of area median income for the City of Madison. These families are referred to as "extremely low-income families."

Applicants who will occupy units with PBV assistance at Truax Park must be selected from the PHA's waiting list. The CDA will establish and manage separate waiting lists for individual projects that are receiving PBV assistance, such as Truax Park.

CDA will select applicants from the PBV waiting lists, such as Truax Park, in accordance with the Section 8 Administrative Plan. The waiting list will give priority to elderly, or disabled and families with minor children. Preference is given to those who live or work in the City of Madison or live or work in Dane County. Additional preference is given to the homeless and victims of domestic violence. CDA will screen applicants for Truax Park before admission to the program for criminal

background and suitability. Tenant screening will be conducted in accordance with the CDA Admissions and Continued Occupancy Plan.

- D. Does the project include plans to provide support services to assisted residents or to link assisted residents to appropriate services? If yes, describe.

Currently there is a full-time CDA Resident Services Coordinator located at the East Housing Management Office. Duties of this position include coordinating residents with appropriate services to better meet their needs. CDA staff also work very closely with the staff of the East Madison Community Center (EMCC) to assure that a good service mix is available to Truax Park residents.

ATTACHMENT F CONTINUED

TOTAL PROJECT PROFORMA (total units in the project)															
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
Revenue															
Gross Income	\$ 257,168	\$ 533,458	\$ 544,624	\$ 558,760	\$ 573,277	\$ 588,181	\$ 603,488	\$ 619,206	\$ 635,350	\$ 651,929	\$ 668,957	\$ 686,444	\$ 704,404	\$ 722,850	\$ 741,795
Less Vacancy	\$ (31,903)	\$ (32,343)	\$ (27,255)	\$ (27,919)	\$ (28,599)	\$ (29,297)	\$ (30,013)	\$ (30,746)	\$ (31,498)	\$ (32,268)	\$ (33,060)	\$ (33,871)	\$ (34,703)	\$ (35,556)	\$ (36,430)
Net Income	\$ 225,265	\$ 501,115	\$ 517,369	\$ 530,841	\$ 544,678	\$ 558,884	\$ 573,475	\$ 588,460	\$ 603,852	\$ 619,661	\$ 635,897	\$ 652,573	\$ 669,701	\$ 687,294	\$ 705,365
Expenses															
Audit	\$ 10,960	\$ 10,960	\$ 11,289	\$ 11,628	\$ 11,977	\$ 12,336	\$ 12,706	\$ 13,087	\$ 13,480	\$ 13,884	\$ 14,301	\$ 14,730	\$ 15,172	\$ 15,627	\$ 16,096
Taxes	\$ 15,529	\$ 31,057	\$ 31,989	\$ 32,949	\$ 33,937	\$ 34,955	\$ 36,004	\$ 37,084	\$ 38,197	\$ 39,343	\$ 40,523	\$ 41,739	\$ 42,991	\$ 44,281	\$ 45,609
Insurance	\$ 10,281	\$ 24,743	\$ 25,485	\$ 26,250	\$ 27,038	\$ 27,849	\$ 28,684	\$ 29,545	\$ 30,431	\$ 31,344	\$ 32,284	\$ 33,253	\$ 34,251	\$ 35,279	\$ 36,337
Maintenance	\$ 18,545	\$ 44,633	\$ 45,972	\$ 47,351	\$ 48,772	\$ 50,235	\$ 51,742	\$ 53,294	\$ 54,893	\$ 56,540	\$ 58,236	\$ 59,983	\$ 61,782	\$ 63,635	\$ 65,544
Utilities	\$ 30,171	\$ 72,615	\$ 74,793	\$ 77,037	\$ 79,348	\$ 81,728	\$ 84,180	\$ 86,705	\$ 89,306	\$ 91,985	\$ 94,745	\$ 97,587	\$ 100,515	\$ 103,530	\$ 106,636
Property Management	\$ 12,093	\$ 29,105	\$ 29,978	\$ 30,877	\$ 31,803	\$ 32,757	\$ 33,740	\$ 34,762	\$ 35,795	\$ 36,869	\$ 37,975	\$ 39,114	\$ 40,287	\$ 41,496	\$ 42,741
Operating Reserve Pmt	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300	\$ 21,300
Replacement Reserve Pmt															
Support Services															
Affirmative Marketing															
Other (Advertising, Administrative, Employee Benefits/Other Taxes, Office Payroll, HA's Compliance Fee, Operating Costs)	\$ 63,333	\$ 146,897	\$ 151,305	\$ 155,844	\$ 160,519	\$ 165,334	\$ 170,294	\$ 175,402	\$ 180,663	\$ 186,084	\$ 191,667	\$ 197,417	\$ 203,340	\$ 209,440	\$ 215,722
Total Expenses	\$ 182,212	\$ 381,310	\$ 392,111	\$ 403,236	\$ 414,694	\$ 426,494	\$ 438,650	\$ 451,169	\$ 464,065	\$ 477,349	\$ 491,031	\$ 505,123	\$ 519,638	\$ 534,588	\$ 549,985
NET OPERATING INCOME	\$ 43,053	\$ 119,805	\$ 125,258	\$ 127,605	\$ 129,984	\$ 132,390	\$ 134,825	\$ 137,291	\$ 139,787	\$ 142,312	\$ 144,866	\$ 147,450	\$ 150,063	\$ 152,706	\$ 155,380
Debt Service															
First Mortgage	\$ 13,125	\$ 40,035	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711
Other - Acquisition Note															
Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total Debt Service	\$ 13,125	\$ 40,035	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711	\$ 82,711
Total Annual Cash Expenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Debt Service Reserve	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cash Flow	\$ 29,928	\$ 79,770	\$ 42,547	\$ 44,894	\$ 47,273	\$ 49,679	\$ 52,114	\$ 54,580	\$ 57,076	\$ 59,601	\$ 62,155	\$ 64,739	\$ 67,352	\$ 69,995	\$ 72,669
Assumptions:															
Vacancy Rate	16.90%	8.45%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%
Annual Increase															
Carrying Charges															
Expenses	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%

COMMUNITY HOUSING DEVELOPMENT ORGANIZATION (CHDO) ONLY

A. Please describe how the organization meets the following key criteria:

- _____ a. Possesses not-for-profit, tax exempt 501(c) status;
- _____ b. Has a board with fewer than 1/3 of its members as public officials;
- _____ c. Includes provision of affordable housing within its statement of purpose;
- _____ d. Includes lower income or lower income representatives for a minimum of 1/3 of its board and includes a means for lower-income participation;
- _____ e. Demonstrates its capacity and experience in service the community.

APPLICATION FOR SCATTERED SITE ACQUISITION FUNDS

Address: _____ Amount Requested: \$ _____

1. Which State of Wisconsin statute are you organized under? _____ Chapter 181
_____ Chapter 185

2. Proposed Acquisition Site:
 - A. Address: _____
 - B. Current appraised value: _____
 - C. Accepted purchase price (if offer has been made): _____
 - D. Number of bedrooms, living units, or shared living units: _____
 - E. Number of square feet on the property: _____

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

4. Describe how your target population meets the CDA definition of special needs.

EMERGENCY SHELTER GRANT FUNDING

A. Describe how you coordinate tasks and responsibilities or target groups with other agencies. (i.e., agencies from whom you commonly receive referrals or to whom you make referrals, and the sequence of contact.) Describe, if appropriate, how a partnership will be formed among local organizations and individual involved with the implementation of the program.

B. If funds are requested for supportive services or prevention activities, describe how the service qualifies as a new service or how it will be a quantifiable increase in services.

Elements of Truax Park Apartments Redevelopment Phase 1 2009-2010 Program Funding Framework for Community & Neighborhood Development

The CDBG Committee established four primary goals and nine outcome objectives for the use of funds to be administered by the Community Development (CD) Office in 2009 and 2010. These funds include three major Federal programs administered through the Department of Housing and Urban Development (Community Development Block Grant, HOME, Emergency Shelter Grant), several State-funded or administered programs (Division of Housing), and local City of Madison funds. The goals and objectives for this two-year period are derived from the CD Office's Community and Neighborhood Development Five-Year Plan and support other Department and Citywide strategic goals, objectives and allocation processes.

The table below identifies the primary goals, preferences, and conditions for use of CD funds for Community and Neighborhood Development projects as outlined below:

Primary goals	Product (Customer Group)	Nature of Project Achievement or Outcome
Housing	A. Owner-occupied housing (Owner-occupant)	Housing made accessible, brought to code, or made safer or more energy-efficient
	B. Housing for buyers (First-time homebuyer)	Households become homeowners
	D. Rental Housing (Renter)	Housing units created, renovated to code or made accessible, better managed, and affordable; "fairly" sited
Business Development	E. Business creating jobs (People seeking jobs)	Jobs created which meet wage standard levels or create advancement opportunities, with 51% for LMI
	F. Micro-business (Small business entrepreneur)	Business created and viable after 4 years
Strengthening Madison's Neighborhoods	G. Civic places (Neighborhood residents)	Centers and community gardens operated, sustained, and developed as neighborhood focal points
	L. Comprehensive Revitalization (Residents and businesses of selected "higher need" areas)	Priority projects completed effectively in a three-year period in ways which support healthy neighborhoods; other activities may include a 4-5 year effort in areas which need a longer period of revitalization
Access to Community Resources	M. Access to resources (Low/moderate income persons seeking housing)	Household informed, placed into housing, or helped to avoid homelessness
	K. Capital facilities (Agencies with capital facilities serving LMI)	Adequate space acquired or improved for accessibility, energy, code, or customer service improvements, plus a set aside for repayment of the Warner Park Center loan

The Truax Park Apartments Redevelopment Phase 1 project will focus primarily on **Primary Goal: Housing**. Elements that relate directly to the Framework are noted in the following paragraphs using the outline of the Framework itself as the organization of the responses.

GOAL ONE: AFFORDABLE HOUSING

The City goal is to maintain and expand the supply of safe, affordable housing throughout the community.

OUTCOME OBJECTIVE D: Rental Housing

Expand the number of affordable housing rental units and/or improve the quality and/or diversity of units available to lower income individuals throughout the community.

- * Funds will be applied to the acquisition, construction or rehab of permanent or transitional rental housing with rents at HOME rent levels.

Truax Park Apartments Redevelopment Phase 1 Proposal: All of the funds requested through this loan will be used to rehabilitate the seventy-one (71) units at Truax Park. In fact, this is so much more than rehabilitation. As mentioned elsewhere, the unit sizes will be increased approximately 25%, a range of in-unit amenities (furnaces, air conditioning, EnergyStar appliances, etc.) and full accessibility will greatly enhance the quality of life of the residents.

Preferences

- * The Commission will give preference to projects which provide housing for households with incomes less than 50% of the area median income, or create new units through new construction or conversion of commercial properties to rental units.

Truax Park Apartments Redevelopment Phase 1 Proposal: Presently, 82% of the remaining residents in the six (6) buildings to be rehabilitated are at or below 30% of the Area Median Income (AMI). The CDA expects that percentage to remain relatively consistent once the units are complete and the site fully leased.

Conditions

- * Funds may generally be used only for housing units that do not exceed the HOME purchase price or value limit designated by the Federal Department of Housing and Urban Development (HUD). For non-HOME-funded projects, CD staff may recommend and the Commission may approve individual exceptions in cases involving hardship.

Truax Park Apartments Redevelopment Phase 1 Proposal: The 2010 Maximum HOME value limit designated by HUD is \$170,143 for a two-bedroom unit. The amount of AHTF investment in each unit at Truax (70 of the 71 units are two-bedroom units) is approximately \$14,230. There is no guidance on the Home value limit for a five-bedroom apartment. The CDBG Office was unable to obtain this information in time for the submittal of this application. The estimated AHTF investment in this unit is \$28,874.

- * Housing (after rehab) shall comply with all applicable City minimum housing and building codes.

Truax Park Apartments Redevelopment Phase 1 Proposal: The project will meet all applicable City minimum housing and building codes. Dimension IV-Madison, as project architects will ensure compliance with all codes required that are necessary through the plan review/construction phase of the project. McGann Construction, acting as the CDA's Construction Manager on the project has a long history of being involved in moderate-income housing production, especially using Low-Income Housing Tax Credits. CDA staff will also be involved in ensuring that HUD-related issues are addressed.

- * The CD Office will consider an investment of up to a level of \$54,000 per unit (approximately 25% of the HOME single-family value limit, a benchmark standard that will change over time), and will evaluate all proposals based on the project's contribution and "value added" to increase the housing stock, upon project need, and availability of resources to determine the appropriate level of funding. The CD Office will give consideration to the higher end of this \$54,000 limit per unit when the proposal meets the preferences stated above (provides housing for households with incomes less than 50% of median, and offers new rental units through construction or conversion of commercial property to housing).

Projects which incorporate accessibility into the design, involve lead paint reduction or asbestos removal, or assure a period of housing affordability that is greater than HOME affordability requirements shall be considered for amounts greater than \$54,000 per unit based on increased costs to provide these features, up to a maximum total of \$60,000 per unit.

The maximum sum of \$60,000 will include the total of all funds provided by the CD Office including, but not limited to CDBG, HOME, Housing Trust Fund, EDI, and TIF 10% set-aside. The CD Office may also offer a higher amount per unit as temporary financing to reduce holding costs. Projects meeting the criteria of the Scattered Site Fund may be eligible for

an additional subsidy (see Section 5 for additional information) as an incentive to locate particular types of housing in areas of the city that do not have a high concentration of lower income housing.

Truax Park Apartments Redevelopment Phase 1 Proposal: The request of \$1,025,000 is \$14,230/unit. As mentioned elsewhere in the application accessibility and energy efficiency are highly-valued aspects of this project. The CDA has also done a thorough review of any lead paint or asbestos issues as part of the due diligence for the Tax Credits. All will be taken care of during the course of the rehabilitation.

- * Newly constructed housing projects will be limited to the development of a total of 16 or fewer units unless, 1) located in areas of the city which do not have a high concentration of lower income housing (as identified on the attached map), 2) are part of a larger neighborhood revitalization effort, or 3) the housing developer demonstrates that a smaller scale project that otherwise meets the objectives within this Framework would not be economically feasible.

Truax Park Apartments Redevelopment Phase 1 Proposal: N/A

- * Existing not-for-profit housing is eligible only for funds available through the Housing Development Reserve Fund (see Section 5 of this document).

Truax Park Apartments Redevelopment Phase 1 Proposal: N/A

- * Projects may not exceed a total secured funds to value ratio greater than 115% from all sources.

Truax Park Apartments Redevelopment Phase 1 Proposal: The total of all secured funding in this project is \$4,125,112, totaling 29% of the total project costs. Since the appraisal is not yet complete, we do not yet know what the ratio will be but believe it will be less than 115%.

- * A minimum of 85% of all funds received shall be applied to capital costs including acquisition and closing costs, rehabilitation, labor and materials, design and engineering costs and relocation costs. A maximum of 15% of the total CD Office funds received may be applied to staffing and other service delivery costs.

Truax Park Apartments Redevelopment Phase 1 Proposal: 100% of the costs associated with the AHTF loan to the CDA will go towards capital costs associated with this project.

- * The CD Office shall secure its funding for capital costs with a mortgage in the form of a non-recourse loan. Funds will be provided in the form of a long-term deferred loan payable upon sale of the property, transfer, or change in the use of the property. Nothing in the CDBG Program Funding Framework precludes the inclusion of specific loan repayment conditions, including a shared appreciation provision, if deemed appropriate under the circumstances.

Truax Park Apartments Redevelopment Phase 1 Proposal: The application requests a fully amortizing loan, the term and structure of which are detailed on page 1, under Section 1, Program Abstract.

- * All projects must comply with the relevant funding source requirements. The CD Office will require that HOME-funded projects comply with the regulations in 24 CFR part 92. The CD Office will require that ESG-funded housing projects comply with ESG requirements and be designed to serve homeless individuals as defined in 24 CFR 576. Projects must be designed to contribute a 50/50 in-kind or cash match for all ESG funds awarded.

Truax Park Apartments Redevelopment Phase 1 Proposal: The CDA is in full agreement with these requirements, as required, for the use of the AHTF financing.

- * The Commission will assist ESG projects which support a continuum of care strategy, and give priority for ESG funds to those projects which help expand the supply of transitional housing. Buildings using ESG funds for minor rehab must be maintained as transitional housing or as a shelter for the homeless for not less than a three-year period; if the funds are used for major rehab, for not less than a ten-year period.

Truax Park Apartments Redevelopment Phase 1 Proposal: N/A

Truax Park Apartment Loan Application: Review Against the Affordable Housing Trust Fund Evaluation Criteria

As of the date of this application, the Madison Common Council has not acted on amending Sec. 4.22 of the Madison General Ordinances to provide greater flexibility in authorizing disbursements from the Affordable Housing Trust Fund. However, with the actions that have been taken by the Board of Estimates; the CDBG Committee; and the Housing Committee; if the Council does amend the Ordinance as proposed, Section 4.22 (5) outlines how requests for disbursements from the Trust Fund will be evaluated by the CDBG Committee and the Council giving preference to developments:

- (a) That leverage other public and private sources of funds;
- (b) That seek loans from the Trust Fund, rather than grants, which will allow the Trust Fund to grow over time;
- (c) That will tie up funds from the Trust Fund for shorter periods of time, rather than longer, which will allow the Trust Fund to be used to support a greater number of projects throughout the City;
- (d) That are targeted to a mixture of household incomes, where Assisted Units are distributed throughout the building or development so as to avoid a disproportionate concentration in any one area;
- (e) That ensure that the Assisted Units remain Affordable for the longest period possible;
- (f) That lead to lower, long-term utility costs for occupants of Assisted Units;
- (g) That meet the highest accessibility standards, as defined by federal, state and local requirements; and
- (h) That are consistent with the Committee's framework and any other similar policy statements adopted by the Committee from time to time.

The CDA acknowledges that changes may occur at Council, but with the amended Ordinance language that will be before the Council on September 7, 2010, the CDA is providing the following statements identifying how the Truax Park Apartment Redevelopment, Phase 1 project addresses each of the proposed evaluation criteria.

(a) Leverage other public and private sources of funds.

This project has a total project of \$14, 254,017. Of that total \$13,229,017, or 93% of the total project costs come from other sources (e.g., Tax Credit Equity, WHEDA Gap financing, CDA funds, etc.). Only 7% of the total project will utilize AHTF funds.

(b) Seek loans from the Trust Fund, rather than grants, which will allow the Trust Fund to grow over time.

The application requests a fully amortizing loan, the terms and structure of which are detailed on page 1, under Section 1, Program Abstract.

(c) Will tie up funds from the Trust Fund for shorter periods of time, rather than longer, which will allow the Trust Fund to be used to support a greater number of projects throughout the City.

The time period for the loan is tied to the length of time the Tax Credit investor is in the deal. The final payment will be made when the Tax Credit investor sells the property back to the CDA for a nominal sum in Year 17 of the project (Please see Attachment F for detail on the pro forma and the debt service for the project).

(d) Are targeted to a mixture of household incomes, where Assisted Units are distributed throughout the building or development so as to avoid a disproportionate concentration in any one area.

Low-Income Housing Tax Credit projects are targeted to households at or below 60% of Area Median Income (AMI). As a 100% Low-Income project, the Truax Park project will be 100% at or below 60% of AMI.

In addition, with the addition of 24 Section 8 Project-Based Vouchers (PBVs), at least 24 of the households will have incomes at or below 50% of AMI. As stated elsewhere in the application, a significant percentage of the residents will have incomes at or below 30% of AMI, with many of those below \$10,000 per year.

(e) Ensure that the Assisted Units remain Affordable for the longest period possible.

As a condition of the receipt of the Low-Income Housing Tax Credits, the LLC will enter into a 30-year Land Use Restriction Agreement (LURA) with WHEDA. Further, at the conclusion of the Tax Credit holding period, the CDA will repurchase the assets from the LLC for a nominal sum and re-integrate the facility back into the public housing portfolio, guaranteeing long-term affordability.

(f) Lead to lower, long-term utility costs for occupants of Assisted Units.

Listed below are improvements designed to provide lower, long-term utility costs for Truax Park residents:

- Envelope Improvement:
 1. Exterior walls - Added insulation in existing exterior walls, and new exterior walls at the additions have "True R-19" (R-20.47 without thermal bridging) insulation with air-vapor barriers, reducing building heat loss in winter and reducing building heat gain in summer.
 2. New windows - Upgrade Windows U-value/SHGC from baseline 0.5/0.55 to improved 0.33/0.29
 3. Roof - Added insulation in existing attics (enhancing them from R-38) and new attics have R-50 insulation without thermal bridging at roof truss bottom chords, further reducing heat loss for third floor apartments and common areas.
- Plumbing System: 93% Efficient Central Gas Water Heaters, Low-flow (1.5 GPM) Kitchen Faucet Aerators, Lavatory Faucet Aerators and Showerheads.
- Mechanical System:
 1. Heating - Units - Upgrade furnace efficiency from 80% AFUE to 94% AFUE
 2. Cooling - Units - Upgrade cooling efficiency from 9.8 SEER to 16 SEER
 3. Heating - Common Area - Upgrade boiler from baseline 80% AFUE to improved 94% AFUE HESCM
- Lighting/ Electrical:
 1. (410) In-Unit Pin-based CFL Fixtures
 2. In-Unit Linear Fluorescent (Kitchen, Bath, Laundry) Fixtures - Custom
 3. (132) Common Area Ceiling-mt. Occupancy Sensor Controls
- Appliance/ Equipment: Energy Star Refrigerators, Dishwashers and In-unit Washers

(g) Meet the highest accessibility standards, as defined by federal, state and local requirements.

When complete, 100% of the apartments will meet the highest level of accessibility standards in effect at the time of the project. Specific details include:

- Prior to this expansion-renovation, none of the Assisted Units were handicapped accessible, as all of them were located at least 4' above adjacent sidewalk grade. As a result of this expansion-renovation, 100% of the Assisted Units are accessible from sidewalk grade to the apartment entry door.
- All Assisted Units are considered 100% visitable (accessible route from parking, no-step entry, thresholds less than ½" high, exterior doors 36" wide, 60x60" maneuvering space both sides of apartment entry doors.)
- Automatic door openers at main entrances to buildings.
- Front-loading washers provided in all 71 Assisted Units.
- One Two-Bedroom Assisted Units, and One Five-Bedroom Assisted Unit, are Type A Handicapped (fully wheelchair accessible, within the dwelling unit); in addition, 15 Two-Bedroom Assisted Units have accessibility within the dwelling unit consisting of universal design features:
 1. Five-foot (wheelchair) turning diameters within kitchens and bathrooms (all 71 dwelling units).
 2. Switches at accessible heights for garbage disposals, range hoods, etc.
 3. Kitchens include 34" height work counters.
 4. Kitchen base cabinets include pull-out shelves (all 71 dwelling units).
 5. Kitchen sinks with offset drainpipe and knee space beneath via removable front cabinet doors.
 6. Low-pile carpeting meeting HUD UM-44d standards (all 71 dwelling units).
 7. Offset controls at tub/shower units (all 71 dwelling units).
 8. Shower floors with non-skid surface or pattern (all 71 dwelling units).
 9. All interior doors 36" width (all 71 dwelling units).


10. Closets with clear floor area to permit forward or parallel wheelchair approach.
11. Rocker-type light switches throughout (all 71 dwelling units).
12. Recessed medicine cabinet with mirrored door, mounted not higher than 40" above floor (all 71 dwelling units).
13. Electrical outlets and voice/data ports minimum 18" above floor.
14. Thermostats maximum 48" above floor.
15. Single-level faucets in kitchens and baths (all 71 dwelling units).
16. Anti-scald devices on hot water supply.
17. Low-profile (or no) thresholds are provided between all interior common areas and in all dwelling unit openings (all 71 dwelling units).
18. All walls within 36" of toilets and in shower areas have ½" plywood backing for future grab bars or other assist devices (all 71 dwelling units).
19. Bathroom grab bars.

The project was tracked though sustainable requirements of Green Communities Criteria Checklist, some highlights of which are:

- choosing a sustainable site;
- using water-conserving appliances and fixtures;
- efficient energy use by providing Energy Star appliances, energy efficient lighting and mechanical equipment;
- improved indoor air quality by specifying low VOC paints, adhesives and formaldehyde free composite wood.

(h) **Are consistent with the Committee's framework and any other similar policy statements adopted by the Committee from time to time.**

Please see **Attachment J** for more detail on how this loan application meets the CDBG Committee's Framework, and other similar policy statements adopted by the Committee from time to time.

TRUAX PARK REDEVELOPMENT-PHASE 1 GMP			
	June 23, 2010	PROJECT	TRUAX
		YEAR	2010
		STORIES	3
		NO. UNITS	71
		SF	91,620
		LOCATION	MADISON
		OWNER	CDA OF MADISON
		ARCHITECT	DIMENSION IV
		PLAN DATE	5.17.2010
	DIVISION	TOTAL	NOTES
1000	GENERAL CONDITIONS	232,994	*PER PROPOSAL
	CITY REVIEW FEES	X	*BY OWNER
	WHEDA CONSTRUCTION SIGN	800	*WILL INCLUDE ALL PARTICIPANTS
	JOB FAIR / OUTREACH COSTS	X	*INCLUDED IN GENERAL CONDITIONS
	RADON TESTS AT COMPLETION	4,800	*PER INVESTOR REQUIREMENTS
	MCI LIABILITY INSURANCE	73,947	*PER PROPOSAL
	POST CONSTRUCTION SURVEY	X	*INCLUDED IN GENERAL CONDITIONS
	BUILDERS RISK INSURANCE	9,000	*PHASED BY BUILDING
	PERMIT EC/SW	X	*INCLUDED IN GENERAL CONDITIONS
	PERMIT APPROACH	X	*INCLUDED IN GENERAL CONDITIONS
	BOND	74,615	
	PLAN PRINTING	2,500	
1500	FINAL CLEANING	X	*INCLUDED IN GENERAL CONDITIONS
2110	BUILDING LAYOUT	X	*INCLUDED IN GENERAL CONDITIONS
2100	DEMOLITION	336,887	
2150	ABATEMENT (3000 LF OF PIPE INS.)	36,000	*ABATEMENT OF PIPE INSULATION ONLY
2200	EARTHWORK	457,162	*HARD ROCK TO DO CUTTING
	EXCAVATION	X	
2710	SITE UTILITIES	X	*INCLUDED IN EARTHWORK
	STORM	X	*INCLUDED IN EARTHWORK
	SANITARY	X	*INCLUDED IN EARTHWORK
	WATER	X	*INCLUDED IN EARTHWORK
2480	LANDSCAPING	94,353	
	RETAINING WALLS	26,774	*BOULDER WALLS
	60 DAY MAINTENANCE	X	*INCLUDED
2525	CURBING	7,791	*AT PARKING LOTS
2741	ASPHALT	35,866	*AS IDENTIFIED IN PLANS
	REPAVE EXISTING LOTS	X	*PULVERIZING IN EARTHWORK
	BASE COURSE	X	
	STRIPING	X	*INCLUDED
	SIGNAGE	X	*INCLUDED
2750	EXTERIOR CONCRETE FLATWORK	X	*PRICE IN CONCRETE 3300
	STOOPS	X	*PRICE IN CONCRETE 3300
	APPROACH	X	*PRICE IN CONCRETE 3300
A	BROKEN SIDEWALK ALLOWANCE	5,000	*INCLUDES HAUL AWAY
	COLORED CONCRETE	X	*EXCLUDED
2800	SITE IMPROVEMENTS	X	
	BIKE RACKS	11,375	*PER PLAN INCLUDES (36) IN BASEMENT

	DIVISION	TOTAL	NOTES
	CHAIN LINK FENCE	5,032	*STORAGE CAGES #3 AND #4
3300	CONCRETE	350,542	
	FOUNDATIONS	X	*INCLUDED
	REBAR	X	*INCLUDED
	FLATWORK	X	*INCLUDED
3360	GYPSUM CONCRETE TOPPING	24,000	*3/4" L.R. AT ADDITIONS ONLY
	CLEAN UP	X	
4200	MASONRY	467,388	
	BRICK PIERS	X	*SEE SITE IMPROVEMENTS
	LINTELS	X	*INSTALL ONLY
	ELEVATOR SHAFT	X	*INCLUDED
	COLOR MORTAR	X	*EXCLUDED
	HEAT & PROTECTION	X	*WINTER CONDITIONS FOR 2 BUILDINGS
5100	STEEL	X	
	STRUCTURAL STEEL	98,830	
	METAL LADDERS	X	*INCLUDED IN STRUCTURAL STEEL
	RAILINGS	36,173	*STEEL BOTH SIDES OF EXISTING STAIRS
5400	STEEL STUD FRAMING	373,000	
	BLOCKING	X	*INCLUDED
5520	ALUMINUM RAILINGS	50,221	*SUPERIOR ALUMINUM
	BALCONIES	X	
6100	ROUGH CARP	636,571	*LUMBER PACKAGE INSTALLED
	HARDWARE	X	*INCLUDED
6192	TRUSSES	X	*INCLUDED IN RC 6100
	HANGERS	X	*INCLUDED IN RC 6100
6200	FINISH CARPENTRY	169,313	*TRIM PACKAGE INSTALLED
	BASE	X	*INCLUDED
	CASING	X	*INCLUDED
	HANDRAIL	X	*INCLUDED
	STAIR CAPS, STRINGERS	X	*INCLUDED
	COMMON AREA	X	*INCLUDED
7141	VAPOR/DAMP PROOF	32,316	
	DRAIN TILE	X	
7200	INSULATION	56,004	
7311	ROOFING SHINGLES	138,000	
	ICE AND WATER SHIELD	X	*INCLUDED
	MEMBRANE ROOFING	20,000	
7390	SOFFIT AND FASCIA	70,467	*FIGURED EVERYWHERE
	MIRATEC AT DECKS	14,453	*AROUND SKIRTS / WRAP COLUMNS
7400	GUTTERS/DOWNSPOUTS	30,300	
	TIE TO STORM	X	
7460	EIFS	476,418	*PER SPECIFICATIONS
	PAINT EXISTING EIFS ONLY	X	*(2) COATS OF APPROVED PAINT, CAULK
	PATCHING	X	*INCLUDED
	FLASHING	X	*INCLUDED
	CAULKING	X	*INCLUDED
7620	FLASHING/SHEET METAL	X	*IN ROOFING / GUTTER-DOWNSPOUTS
7720	ROOF ACCESSORIES	8,306	*ATTIC ACCESS (1) PER BUILDING
7840	FIRE PROOFING	7,699	
7900	CAULKING	10,679	
8110	HOLLOW METAL DOORS & FRAMES	146,670	

	DIVISION	TOTAL	NOTES
8200	METAL INSULATED DOORS	25,887	
8210	WOOD DOORS	138,848	
	PREHUNG	X	
	BI-FOLDS	X	*REUSE MAGIC GLIDE DOORS
	COMMON AREA	X	
	APT. ENTRY DOORS	X	
8300	ACCESS DOORS	2,928	*FIRE RATED
8520	PATIO DOORS	140,985	
	LOW PROFILE SILLS	X	
8610	WINDOWS	83,810	
8710	FINISH HARDWARE	45,657	
8710	POWER DOOR OPERATORS	35,980	*(24) TOTAL (2) AT EACH ADDITION
8800	GLASS/GLAZING	7,200	*HOLLOW METAL DOORS
	MIRRORS	X	*IN BATH ACCESSORIES
9250	DRYWALL	388,601	
	ORANGE PEEL TEXTURE	X	*INCLUDED
	DRYWALL RETURNS	X	*INCLUDED
	FIREWALLS/SHEAR/PARTY	X	*INCLUDED
	SOFFITS	X	*INCLUDED
	CLEAN-UP	X	*INCLUDED
	HUMIDITY CONTROL	X	*INCLUDED
9300	FLOORING	346,262	
	LAMINATE FLOORING	X	*INCLUDED
	VINYL BASE IN CORR.	X	*INCLUDED
	PROTECTION	X	*INCLUDED
	EXISTING CONC. SLAB REPAIRS	14,669	*PATCHING / SKIM COATING / LATEX
	TILE	X	*INCLUDED AT BATHROOMS
	CARPETING / CARPET TILES	X	*INCLUDED
	EXISTING STAIRS / VINYL RISERS	X	*INCLUDED
	ELEVATOR CARPET	X	*INCLUDED
9900	PAINTING	109,400	
	UNITS	X	*INCLUDED
	COMMONS	X	*INCLUDED
	METAL DOORS	X	*INCLUDED
	MISC. METAL	X	*INCLUDED
	TOUCH-UP	X	*INCLUDED
	ACCENT WALLS	X	*INCLUDED
	PUTTY NAIL HOLES	X	*INCLUDED
10426	SIGNAGE	13,320	
10522	FIRE-X	13,550	
10550	POSTAL	7,897	
	DROP BOX	X	*INCLUDED
	MAILBOX	X	*(1) BANK OF 12 PER BUILDING
10560	KNOX BOX	2,600	*(1) PER BUILDING
10700	EXTERIOR SUN SHADES	38,640	
10800	TOILET ACCESS.	18,938	
	GRAB BARS	X	*INCLUDED IN WHEDA UNITS
	MEDICINE CABINETS	X	*INCLUDED
	SHOWER RODS	X	*INCLUDED
	PAPER HOLDER	X	*INCLUDED
	ROBE HOOKS	X	*INCLUDED

	DIVISION	TOTAL	NOTES
	MIRRORS	X	*MIRRORED MEDICINE CABINET COMBO
10670	CLOSET SHELVING	24,004	*WIRE (ADJUSTABLE AT WHEDA)
11450	APPLIANCES	186,307	*ALTERNATE SS PACKAGE FROM SPEC.
12100	CABINETS	181,966	*CABINETS/TOPS/SILLS
	VANITIES	X	*INCLUDED
	ROLL-OUT SHELVES	X	*INCLUDED
	PULLS	X	*EXCLUDED (SEE ALTERNATES)
12150	PLASTIC LAMINATES	41,981	
	CAULK	X	*INCLUDED
12160	CULTURED MARBLE TOPS	12,276	*BATHROOM TOPS
	CAULK	X	*INCLUDED
	INTEGRAL BOWL	X	*INCLUDED
12370	WINDOW SILLS	37,341	*CULTURED MARBLE
	CAULK	X	*INCLUDED
12500	WINDOW TREATMENTS	46,209	
14200	ELEVATORS	468,208	*LULA ELEVATOR
	PADS	1,600	*ONLY 2 ELEVATORS WORTH
	LADDERS	X	*INCLUDED (1) PER PIT
15300	SPRINKLER	159,700	*NFPA 13R
	PERMITS	X	*INCLUDED
15400	PLUMBING	695,000	*CHROME/NICKEL FIXTURES
	PERMITS	X	*INCLUDED
	PIPING	X	*PEX OR CPVC PIPING
	HOSE BIBS	X	*INCLUDED
	GAS PIPING	X	*INCLUDED
	PIPE INSULATION	X	*INCLUDED
	DISPOSALS	X	*INCLUDED
15600	HVAC	689,960	*FURNACES WITH CENTRAL AIR
	RANGE HOODS DUCTED	X	*INCLUDED
	BATH FANS DUCTED	X	*INCLUDED
	DRYERS DUCTED	X	*INCLUDED
	PROGRAMMABLE STATS	X	*INCLUDED
	GAS PIPING	X	*PLUMBING HAS INCLUDED
	FURNACES	X	*INCLUDED
	CONDENSATE PIPING	X	*INCLUDED
16100	ELECTRICAL	722,444	
	SITE	X	*INCLUDED
	COMMON	X	*INCLUDED
	UNITS	X	*INCLUDED
	LIGHT POLES & BASES	X	*INCLUDED
	LOW VOLTAGE WIRING	X	*INCLUDED
	FIRE ALARM	X	*INCLUDED
	CONTINGENCY	X	*EXCLUDED
	SUBTOTAL	9,335,112	
	CM FEE 2.15%	200,705	
	TOTAL	9,535,817	
	PARTICIPATION		23.50%

TRUAX PARK REDEVELOPMENT - PHASE 1



ALTERNATES:				
UPDATED 8-3-10			YES	
#1	DEDUCT TO USE SUBSTITUTE LIGHT FIXTURE PACKAGE	(28,730)	(28,730)	ELECTRICAL
#2	ADD FOR EMT CABLING AS SPECIFIED IN LIEU OF NON METALLIC	63,640	NO	ELECTRICAL
#3	SWITCHED RECEPTACLES AT BEDROOMS IN LIEU OF A CEILING FIXTURE	(18,663)	NO	ELECTRICAL
#4	ELIMINATE OVERRIDE SWITCHES IN COMMON STAIRCASES	(2,085)	(2,085)	ELECTRICAL
#5	REPLACE TYPE "M" FIXTURE WITH EGRESS FIXTURE	(18,767)	(18,767)	ELECTRICAL
#6	CHANGE TIME CLOCK ET70115C TO T101	(1,251)	(1,251)	ELECTRICAL
#7	INSTALL ONE PHONE JACK IN LIVING ROOM IN LIEU OF TWO	(1,894)	(1,894)	ELECTRICAL
#8	CHANGE 800 AMP MAIN TO 600 AMP MAIN	(2,606)	(2,606)	ELECTRICAL
#9	CHANGE TYPE E FIXTURES TO TYPE G FIXTURES	(2,189)	(2,189)	ELECTRICAL
#10	CHANGE TYPE J FIXTURE TO PULSE START METAL HALIDE	(4,170)	(4,170)	ELECTRICAL
#11	CHANGE PIPE INSULATION FROM FIBERGLASS TO ELASTOMERIC	(13,216)	(13,216)	PLUMBING
#12	CHANGE FIBERGLASS PIPE INSU. FROM ALL WATER PIPING TO MAINS IN BASEMENT & WATER RIS	(31,009)	NO	PLUMBING
#13	CHANGE ELASTOMERIC PIPE INSU. FROM ALL WATER PIPING TO MAINS IN BASEMENT & WATER P	(22,510)	(22,510)	PLUMBING
#15	USE EXISTING BOILERS WITH INDIRECT TANKS FOR DOMESTIC HOT WATER	(107,841)	(107,841)	PLUMBING
	*If water heaters are eliminated then individual water meters will not work.	X		
#16	ADD TO USE COPPER AS SPECIFIED (PLUMBER HAS PEX OR CPVC PIPING IN GMP)	49,002	NO	PLUMBING
#17	DEDUCT TO OMIT SUPPLY DUCT INSULATION	(5,734)	(5,734)	HVAC
#18	DEDUCT TO USE STANDARD COPPER FIN TUBE WITH WALL COVERS	(26,065)	(26,065)	HVAC
#19	DEDUCT TO OMIT MOTORIZED DAMPERS (NOT REQUIRED BY CODE)	(9,373)	(9,373)	HVAC
#20	DEDUCT TO CHANGE FRESH AIR INTAKE LOUVERS TO STANDARD WALL CAPS	(5,557)	(5,557)	HVAC
#21	DEDUCT TO GO WITH 15 SEER A/C CONDENSING UNITS IN LIEU OF 16 SEER AS SPECIFIED	(7,402)	NO	HVAC
#22	ADD TO REPLACE EXISTING BOILERS, PIPING, & BUFFER TANK IN LIEU OF REUSING	46,187	NO	HVAC
	*Still install new main loop pumps, the existing are old and nearing the end of their life.	X		
#23	ADD FOR CABINET HARDWARE (PULLS)	14,190	NO	CABINETS
#24	UP CHARGE TO GO WITH SOLID SURFACE COUNTERTOPS	95,563	NO	CABINETS
#25	DEDUCT FOR ROOF HATCH LADDERS IF NOT REQUIRED	(2,925)	NO	SPECIALTIES
#26	DEDUCT TO OMIT ROOF HATCHES AT ALL BUILDINGS	(5,721)	NO	SPECIALTIES
#27	DEDUCT TO USE ARMSTRONG CABINETS "ADVANTA" STYLE WITH MAPLE SHAKER DOOR	(37,182)	(37,182)	
#28	DEDUCT TO OMIT 32 BICYCLES FROM BASEMENTS	(8,686)	NO	SPECIALTIES
#29	DEDUCT TO USE WHITE ENERGY STAR APPLIANCE PACKAGE	(10,507)	NO	APPLIANCES
#30	USE 1" CLASSIC ALUMINUM MINI-BLINDS IN LIEU OF 2" FAUX WOOD BLINDS	(20,459)	NO	SPECIALTIES
#31	DEDUCT TO OMIT 32 DECORATIVE STONE PIERS	(25,095)	NO	MASONRY
#32	DEDUCT TO DELETE (71) BOOK SHELVES IN LIVING ROOMS	(16,942)	(16,942)	TRIM
#33	ADD TO PAINT ALL CEILINGS A SEPARATE COLOR IN LIEU OF ONE COLOR THROUGHOUT	25,022	NO	PAINTING
#34	DEDUCT TO CHANGE COMPOSITE DECKING TO 5/4 X 5 1/4 TREATED	(14,335)	(14,335)	CARPENTRY
#35	DEDUCT TO OMIT ALUMINUM RAILING AT FIRST FLOOR PATIOS	(17,418)	NO	CARPENTRY
#36	DEDUCT TO USE WESTERN OUT SWING STEEL PATIO DOOR W/INTEGRAL BLINDS AND SCREENS	(42,380)	NO	DOORS
#37	DEDUCT TO USE PVC WATER LINES IN LIEU OF THE DUCTILE IRON PIPE SPECIFIED	(12,303)	NO	PLUMBING
			(320,447)	
TOTAL				

BASE GMP
 LESS ACCEPTED ALTERNATES
 REVISED GMP

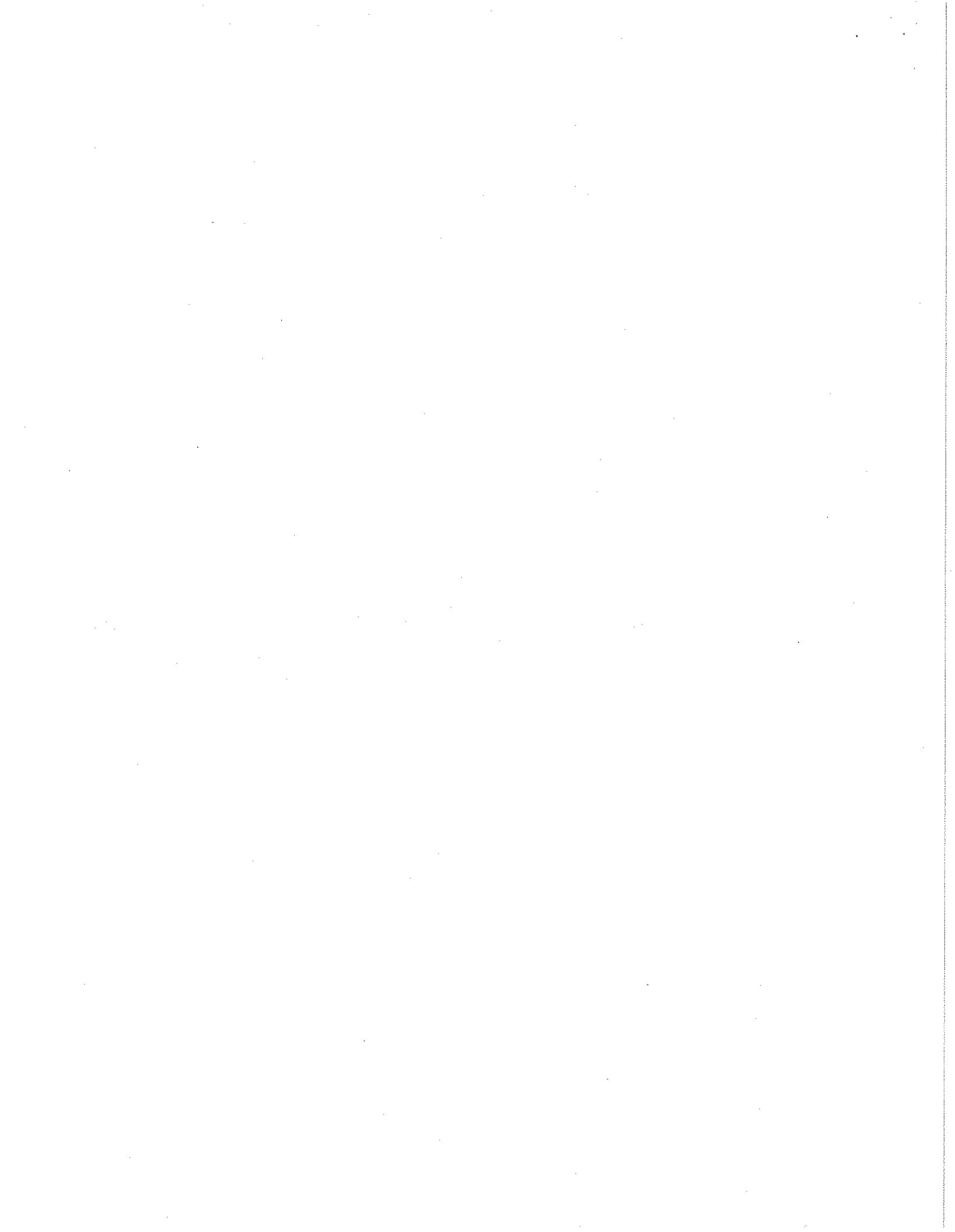
9,535,817
(320,447)
 9,215,370

APPENDIX 1

**TRUAX PARK APARTMENTS
MASTER PLAN & SITE DEVELOPMENT STUDY**

ADOPTED BY
The Community Development Authority of
The City of Madison
CDA Resolution No. 2803
Legislative File ID 10288
May 8, 2008

The Madison Common Council
Enactment No. RES-09-00340
Legislative File ID 13981
March 31, 2009



Truax Park Apartments Master Planning and Site Development Study

The Community Development Authority of the City of Madison

Prepared by

JJR

In association with

SMITH & SMITH ASSOCIATES, Inc

CONSTRUCTION COST SYSTEMS, Inc



February 2008

ACKNOWLEDGEMENTS

The Truax Park Apartments Ad-Hoc Committee

Gregg Shimanski, *Chair - Community Development Authority*

Jeanne Hoffman, *Mayoral*

Andy Heidt, *Community Development Authority Long-Range Planning Subcommittee*

Alice Fike, *Community Development Authority Long-Range Planning Subcommittee*

Denise Charkowski, *Carpenter Ridgeway Neighborhood Association*

Pat Hadden, *Truax Neighborhood Association*

Tamara Hill, *Truax Neighborhood Association*

TNA Alternate – Der Xiong, *Truax Neighborhood Association*

Roger Price, *Vice President for Infrastructure Services, Madison Area Technical College*

Aaron Blacks, *East Madison Community Center*

Mark Olinger, *Director Department of Planning and Community and Economic Development, Community Development Authority*

Agustin Olvera, *Division Director Housing Operations Division, Housing Operations*

Alder Joe Clausius, *District 17*

Consulting Team

JJR

In association with

SMITH & SMITH ASSOCIATES, Inc

CONSTRUCTION COST SYSTEMS, Inc

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The master planning and site development study for the Truax Park Apartments builds upon the recommendations made by the Community Development Authority of the City of Madison (CDA) Long-Range Planning Sub-Committee to revitalize the Truax Park Apartments into a mixed-income community. The study area is bounded by Anderson Street to the north, Wright Street to the west, Straubel Street to the south, and wooded area to the east. In addition, the Madison Area Technical College (MATC) is adjacent to the site to the north and west. The site is comprised of 147 public housing units on CDA-owned land that is administered by CDA Housing Operations, and includes the East Madison Community Center.

CDA commissioned JJR to work with the residents and key stakeholders to develop a consensus-based master plan to transform the site into a mixed-income community. JJR in association with Smith & Smith Associates, Inc., and Construction Cost Systems, Inc., conducted an extensive public input process to develop a revitalization plan that addresses the needs of the residents and the challenges faced by CDA as summarized in the CDA Long-Range Planning Sub-Committee initial progress report*. Regular meetings and review sessions with the Truax Park Apartments Ad-Hoc Committee were also conducted during this process.

With a vision of providing long term quality and affordable housing to CDA's residents, enhancing the quality of life of the existing residents and attracting new residents, the planning team utilized the following project objectives*:

- To plan for no net loss of public housing;
- To not displace residents from public housing & work to find solutions that make best efforts to retain residents in their current locations;
- To insure that residents will be part of the conversations regarding any changes to their communities;
- To promote mixed-incomes and populations;
- To provide a Physical Plan for a more viable and sustainable community through time.

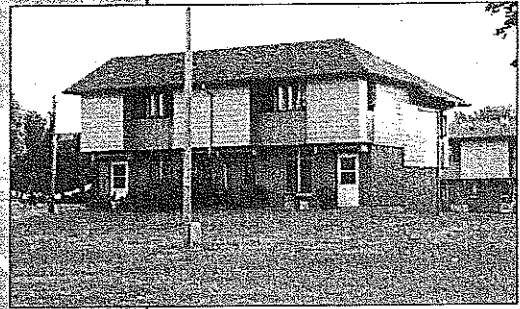
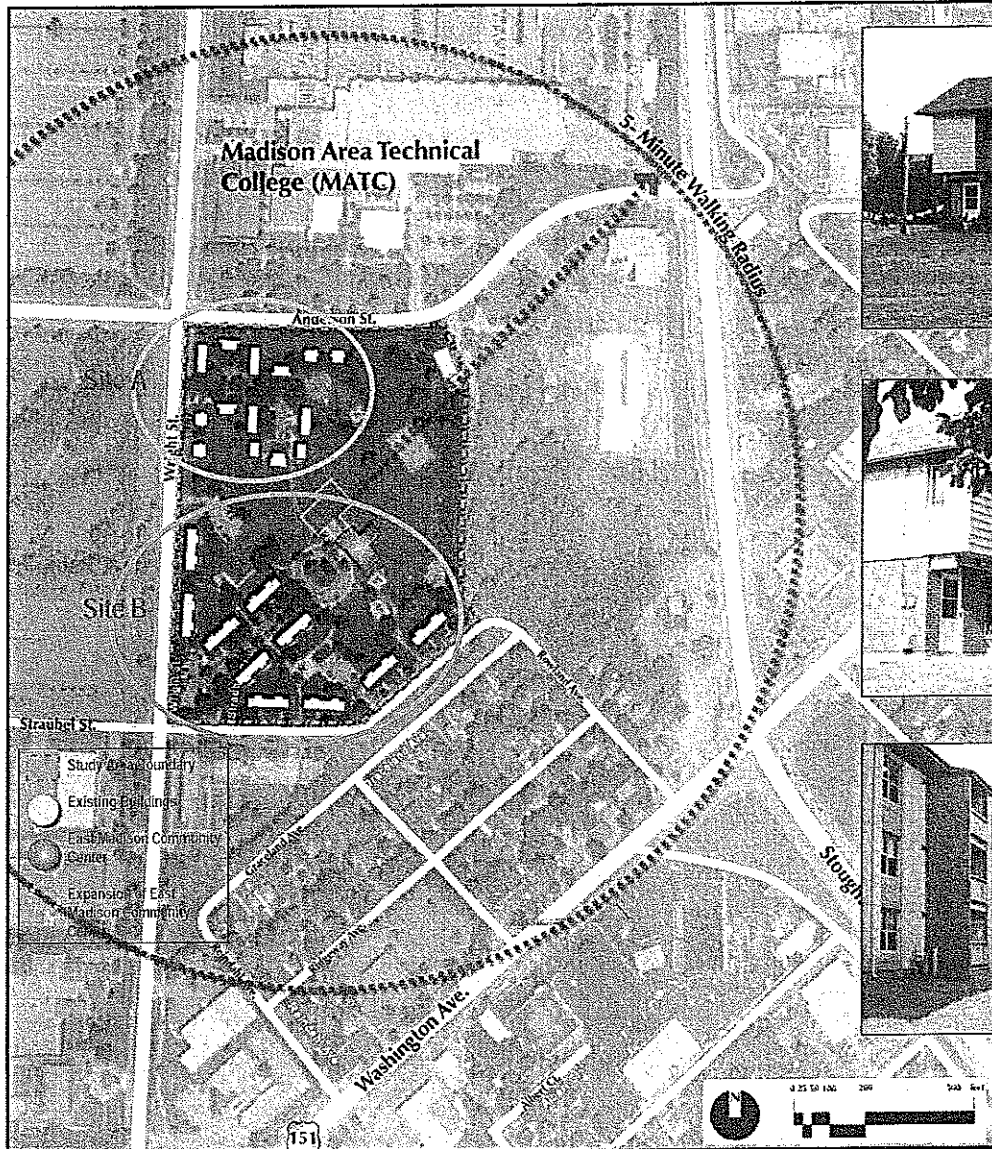
* Source: CDA Long-Range Planning Sub-Committee Initial Progress Report, December 2006

This document is intended to serve as a guide for the future of Truax Park Apartments. It serves as a strong foundation in a long process to revitalize the Truax Park Apartments and offers CDA a set of recommendations, a physical plan, and resident endorsed guiding principles. This document is intended to assist the CDA to set the next steps in the process to implement the Truax Park Apartments vision. The consensus-based preferred Master Plan is intended to offer a road map for the future of the site.

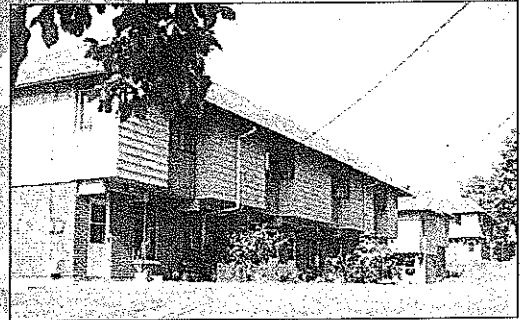
The document is divided into six chapters and builds upon the different phases in the planning process that were conducted for this project.



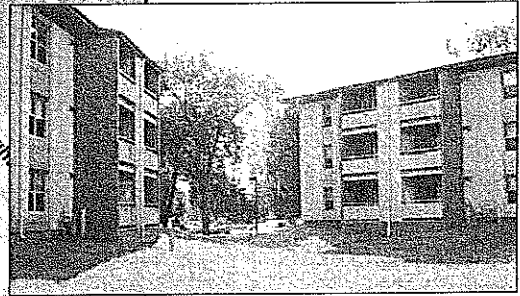
2 SITE CONTEXT



Site A



Site A



Site B

Study Area

Site Area = 18.8 Acres

Existing Units = 147

Site A

Constructed in 1965

Total Units = 35 (1 to 5 bedrooms)

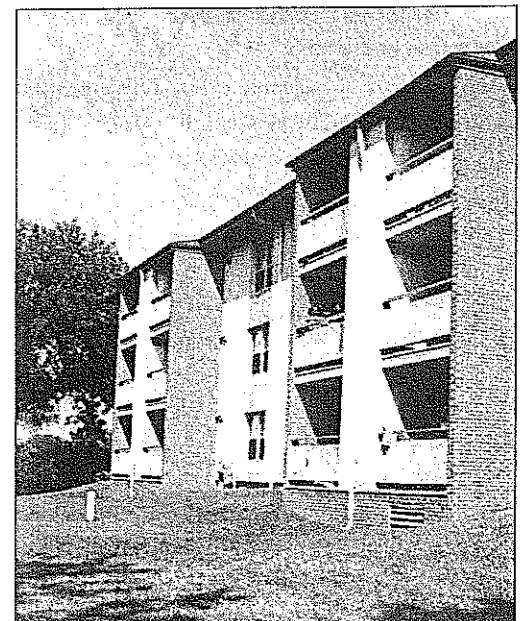
Total Buildings = 14 (1 to 2 story)

Site B

Constructed in 1948; Remodeled in 1980










Total Units = 112 (111 - 2 bedrooms & 1 - 5 bedroom)

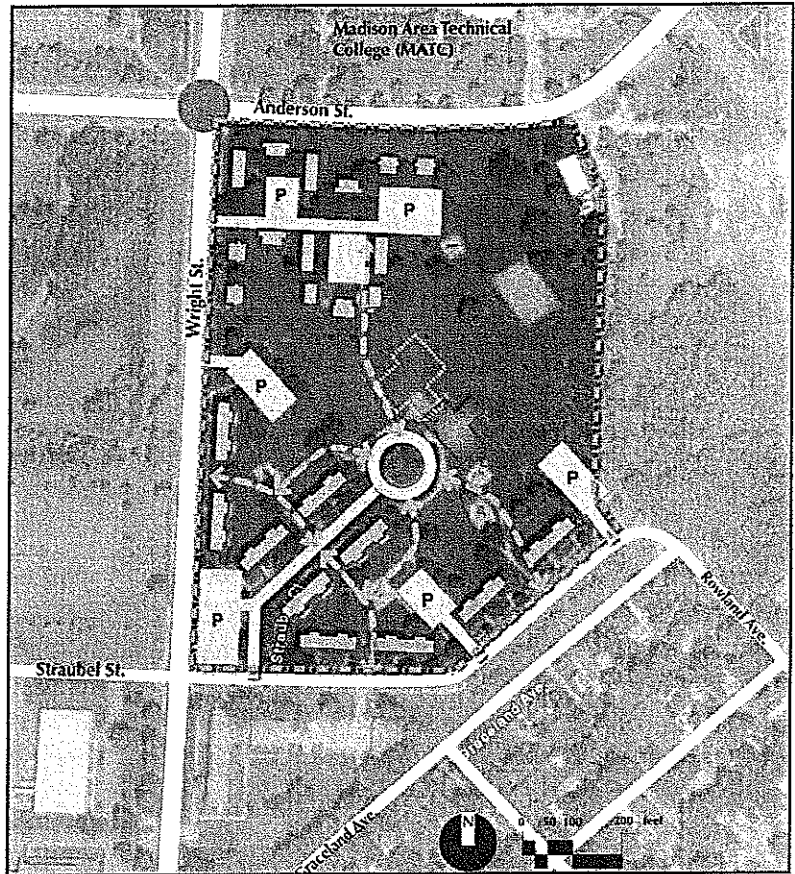
Total Buildings = 10 (3 story)









Site B

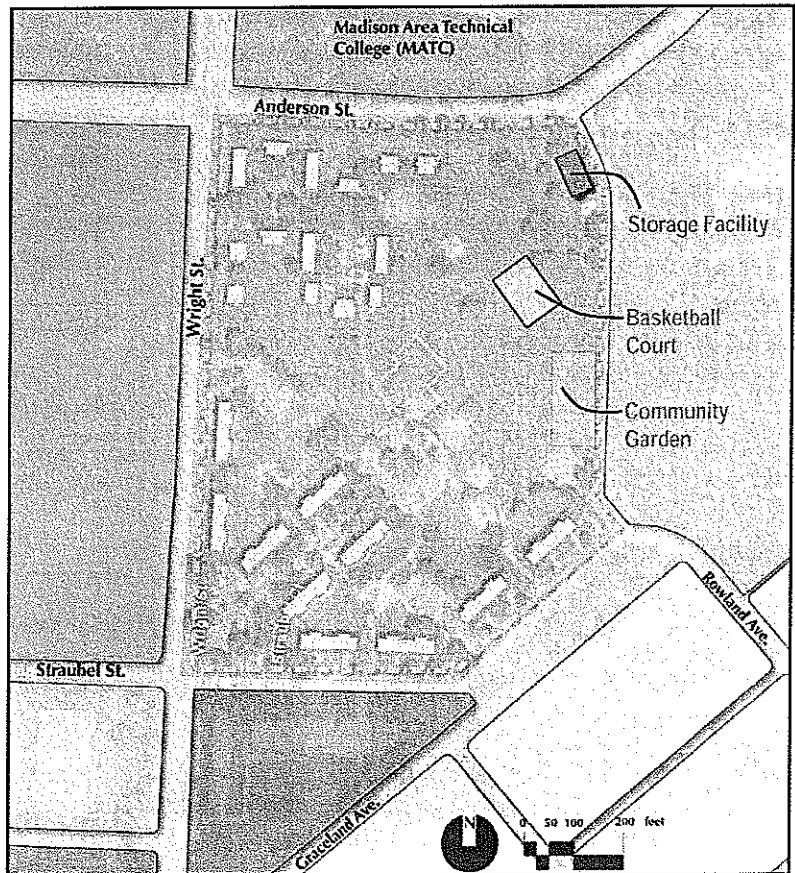
SITE CONTEXT

-  Study Area Boundary
-  Existing Buildings
-  East Madison Community Center
-  Expansion of East Madison Community Center
-  Existing Streets (around the Study Area)
-  Existing Streets (within the Study Area)
-  Existing Surface Parking
-  Existing Major Pedestrian Linkages
-  Existing Transit Bus Stop



Existing Circulation

-  Multi-family Residential (Study Area)
-  Single-family Residential
-  Educational (MATC Campus)
-  Park & Open Space
-  Commercial
-  Governmental



Existing Land Use

3 PROCESS

The planning process included site reconnaissance, written surveys for the residents, development of a building program and density studies, and meetings with key representatives from the CDA and the Truax Park Apartments Ad-Hoc Committee. There was extensive public participation that included resident only meetings and community meetings during each phase of the project. Various planning tools and techniques such as visual preferencing, break-out groups and one-on-one dialogue were employed during a process that included 3 resident meetings, 2 community meetings, and 4 ad-hoc committee meetings over a period of 6 months (see project timeline on page 5).

The project review and update meetings with the Truax Park Apartments Ad-Hoc Committee were conducted at regular intervals prior to resident meetings for up to 4 such meetings. Two of the resident meetings were held prior to the community meetings with the 1 combined resident and community meeting. The purpose of an extensive public input process was to gather input from the residents and the community regarding the desired vision for the site. The meetings were designed to be interactive and involved a brief presentation followed by small break-out groups where the participants were engaged in discussions and exercises to gather their input.

As part of the first residents-only workshop, a visioning session was conducted focusing on the future vision of the Truax Park Apartments site. The visioning session included four topics of discussion where each topic focused on Architecture, Density, Common areas, and Linkages. The following is the summary of the visioning session:

Architecture: The desired vision for this site includes mix of housing types - Single-family detached, attached housing/ townhouses, and existing multi-family housing. All were considered desirable but with varying preferences (ranging from most preferred, second most preferred and third most preferred). Single-family detached housing and townhouses with front

yards were preferred over housing where the sidewalks were too close to building façade. Existing 3-story multi-family buildings with some retrofitting and other examples of 3-story, multi-family buildings fronting pedestrian friendly streets were also desired.

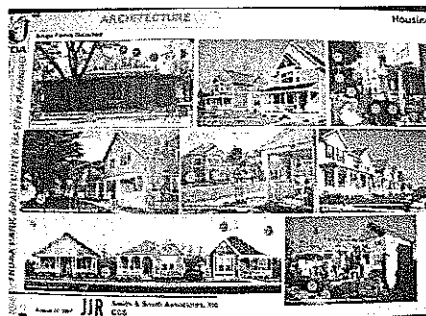
Density: The desired vision for this site includes a balance between numbers of units, the placement of buildings, building heights and adequate open spaces between buildings. Multi-family buildings and single-family detached and attached buildings ranging from 1-3 story, and density ranging from 7 to 17 dwelling units per acre, were considered desirable but with varying preferences. Buildings up to 3-story with a variety of bedroom sizes ranging from 2 to 3+ bedrooms, buildings that are not placed too close to each other, and the site with adequate green/open spaces were desired.

Common Areas: The desired vision for the site includes a mix of active and passive open spaces. Expansive open spaces/ green spaces, the Community Center and spaces around the Community Center, open spaces created between clusters of housing, community garden, and play areas for kids were considered desirable but with varying preferences. Linkages to these spaces via pedestrian paths were also desired. The basketball court, parking lots in the southwest, southeast and northwest quadrants, and the storage facility were considered undesired spaces on-site. The desired safe places on-site include the Community Center and spaces around the Community Center, and spaces between existing housing.

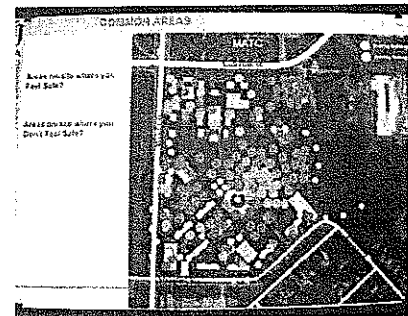
Linkages: The desired vision for the site includes wider and more sidewalks on-site, more lighting in parking lots, more bus stops, sheltered bus stops, and more frequency of bus services was desired. The general observation was that most of the residents who live in the southwest quadrant of the site use existing parking lots and on-street parking. The residents who live in the northwest quadrant of the site mostly use existing parking lots. Most of the residents use on-site public transit for commuting.



Resident Meeting # 1: Visioning



Resident Meeting # 1: Visioning session resident input

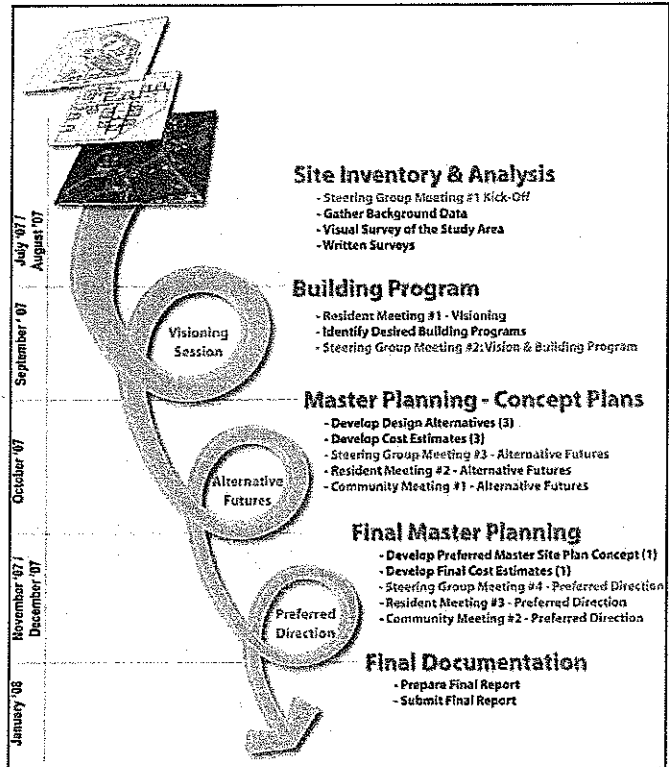


Resident Meeting # 1: Visioning session resident input

With the goal of no net loss in existing public housing while adding new housing and attracting market-rate homebuyers to this community, a detailed building program and density studies were prepared for the site. This was built upon the resident input during the visioning session. The detailed building program included 3 different scenarios each with varying density, unit count and housing types (see building program summary below).

This was followed by developing the 3 alternative concepts with varying density; diverse housing types and unit mix. Based upon the resident desired vision and ad-hoc committee recommendations, the scenario with highest unit count and density was not advanced. The remaining two scenarios were used to develop the 3 alternatives where the unit count ranges from a minimum of 302 units (16 dwelling units per acre) to a maximum of 377 units (20 dwelling units per acre).

Through a process of refinement and public dialogue the preferred master plan was developed with a density that falls within low to medium density range as per the City of Madison.



Project Timeline

Building Program Summary: Visioning Session

Market-Rate Led	Market / Low-Income Led	Low-Income Led
50% Market Rate = 253 (new units)	40% Market Rate = 150 (new units)	30% Market Rate = 90 (new units)
20% Affordable = 103 (new units)	20% Affordable = 75 (new units)	20% Affordable = 60 (new units)
30% Low Income = 152 (116 existing + 36 new units)	40% Low Income = 152 (116 existing + 36 new units)	50% Low Income = 152 (116 existing + 36 new units)
TOTAL UNITS = 508 Units	TOTAL UNITS = 377 Units	TOTAL UNITS = 302 Units
Site Area = 19 Acres	Site Area = 19 Acres	Site Area = 19 Acres
Density = 26 Units/Acre	Density = 20 Units/Acre	Density = 16 Units/Acre
Total New Units = 253 + 103 + 36 = 392	Total New Units = 150 + 75 + 36 = 261	Total New Units = 90 + 60 + 36 = 186
Total Site Area Covered (new units) = 465,840 sf or 10.7 Acres	Total Site Area Covered (new units) = 306,110 sf or 7.0 Acres	Total Site Area Covered (new units) = 227,565 sf or 5.2 Acres

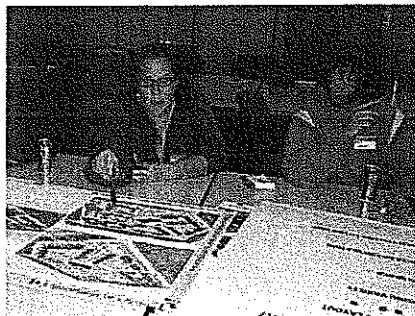
Program with highest density - *Undesired*

Program with comparatively second most high density - *desired*

Program with comparatively lowest density - *desired*



Resident Meeting # 2: Alternative Futures



Community Meeting # 1: Alternative Futures



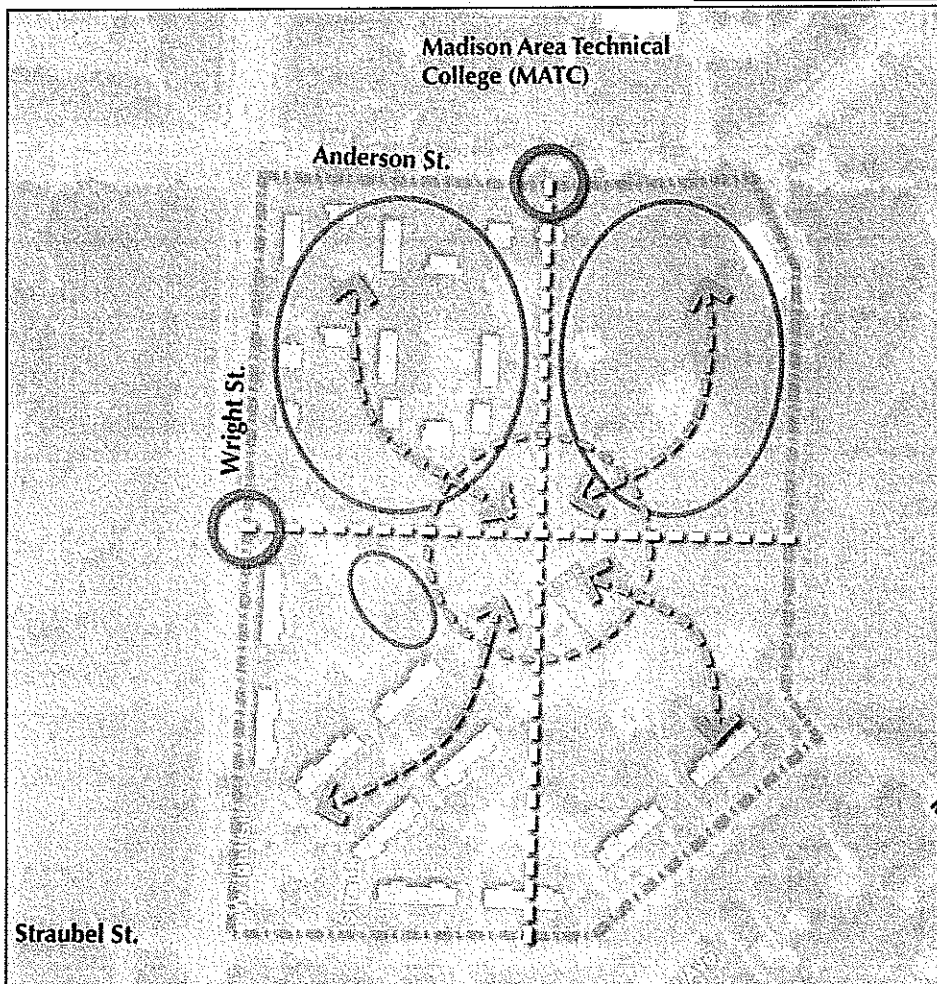
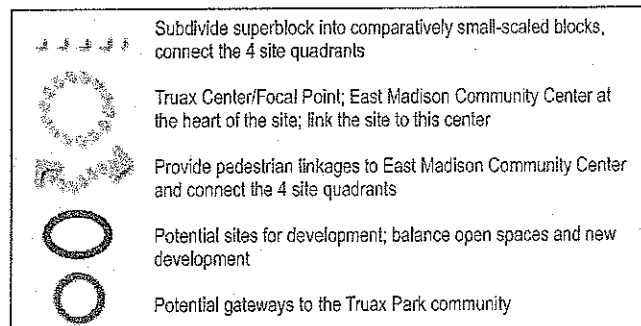
Resident Meeting # 3 & Community Meeting # 2: Preferred Direction

4 GUIDING PRINCIPLES

The guiding principles were developed with the intent of addressing the resident endorsed vision for their community and CDA long range committee's recommendations. The analysis of resident input during the visioning session, review of the building program, and dialogues with the ad-hoc committee resulted in developing the guiding principles.

These principles were utilized in the developing the 3 alternative concepts (see page 8) and the preferred plan (see page 13) and are listed below:

- Results in no net loss of public housing;
- Creates a mixed-income community;
- Balances open space and new development;
- Creates pedestrian linkages throughout the site;
- Proposes no new buildings exceed existing building heights (3-story), except at locations where appropriate;
- Allows for phased development;
- Meets low to medium density criteria (per City of Madison standards).



Guiding Principles Illustration

PROPOSED PROGRAM

Existing and proposed parks/open spaces play an important role in overall site layout for each of the alternatives. Based upon the resident and community input, the proposed program for the site includes a combination of active and passive open spaces. These spaces not only offer outdoor community gathering areas and play areas, but also function as landscape and visual buffers and provide pleasant views. Each of the alternatives offers the following range of parks/open spaces:

- Expanses of passive open spaces
- Community garden
- Recreation areas
- Landscaped streets
- Balconies, terraces
- Front yards

Proposed Building Types

2-Story Townhouses: Townhouses are either located fronting streets or open spaces. Where the townhouses front the street they are setback 10-20 feet from the sidewalk (property line) or they meet the setback line of existing buildings. The setbacks offer front yards with porches and front doors. They are designed with balconies overlooking the landscaped streets or open spaces. Each of the townhouses has a 2-car attached garage accessed via the street or the alley.

3-Story Townhouses with Flats: These walk-up townhouses and flats are either located fronting streets or open spaces. Where the townhouses front the street they are setback 10-20 feet from the sidewalk (property line) or they meet the setback line of existing buildings. The setbacks offer front yards with porches and front doors. They are designed with balconies overlooking the landscaped streets or open spaces. Each of the buildings has a 2-car attached garage accessed via the street or the alley.

Single-Loaded Walk-Up Apartment Buildings: These apartment buildings are designed using the existing 3-story apartment building footprint. They are setback 10-20 feet from the sidewalk (property line) or they meet the setback line of existing buildings. The setbacks create shared open spaces fronting the buildings. They are designed with balconies overlooking the landscaped streets or open spaces.

3-Flat Buildings: The flats are either located fronting streets or open spaces. They are setback 15-20 feet from the sidewalk (property line) or they meet the setback line of existing buildings. The setbacks create shared open spaces with front doors for the residents. They are designed with balconies overlooking the landscaped streets or open spaces.

Double-Loaded Apartment Buildings: These 3-4 story buildings are placed at key locations along the site periphery along Anderson Street and are setback 15-20 from the sidewalk (property line). They are designed with balconies overlooking the landscaped streets or open spaces. When these buildings are 4 stories high (as illustrated in the preferred plan) the 4th story can be stepped back 15 – 20 feet from the building line to maintain a consistent street character where all the buildings along the streets are 3-story high. These units share the public parks/open spaces that are connected to the rest of the site via systems of pedestrian walkways. Surface parking or half basement parking (within the building footprint) is proposed for these buildings.

Remodel Existing Buildings: In order to promote a mixed-income community, some of the existing buildings are recommended to be remodeled to accommodate market-rate and/or affordable housing. This can be achieved by transforming the 4 units on one of the floor into 3 larger-sized units. These 3 units could be market-rate and/or affordable. Surface parking is proposed for these units.

5 ALTERNATIVE FUTURES

This chapter illustrates the alternative concepts that were developed for this site. Three alternative concepts were created each with varying density of 16, 17, and 18 dwelling units per acre that is within the low to medium density range for the City of Madison. Each of the concepts illustrates different pedestrian and vehicular circulation patterns, linked parks/open space, provisions for private and public open spaces, and recreation areas. Through this approach we were able to determine the number of units, number of units by bedroom sizes, and building types that can be accommodated on this site. Since the site already consists of community activity and recreational areas, such as a community garden and East Madison Community Center, no new on-site Community Center is proposed.

Each of the alternatives builds upon the desired building program established during the Visioning Session and the Guiding Principles as discussed in the previous chapter. Each alternative offers the following community building elements:

- System of well-connected existing and proposed streets to form better connections throughout the site;
- Provisions for public and private open spaces;
- Balance between existing open spaces and new development;
- Pedestrian linkages throughout the site that connect the different quadrants of the site and the Community Center with rest of the site;
- Concepts where the buildings do not exceed the existing 3-story buildings on-site;
- Preserves existing utilities and utility easements wherever possible;
- Accommodates mixed-incomes and populations.

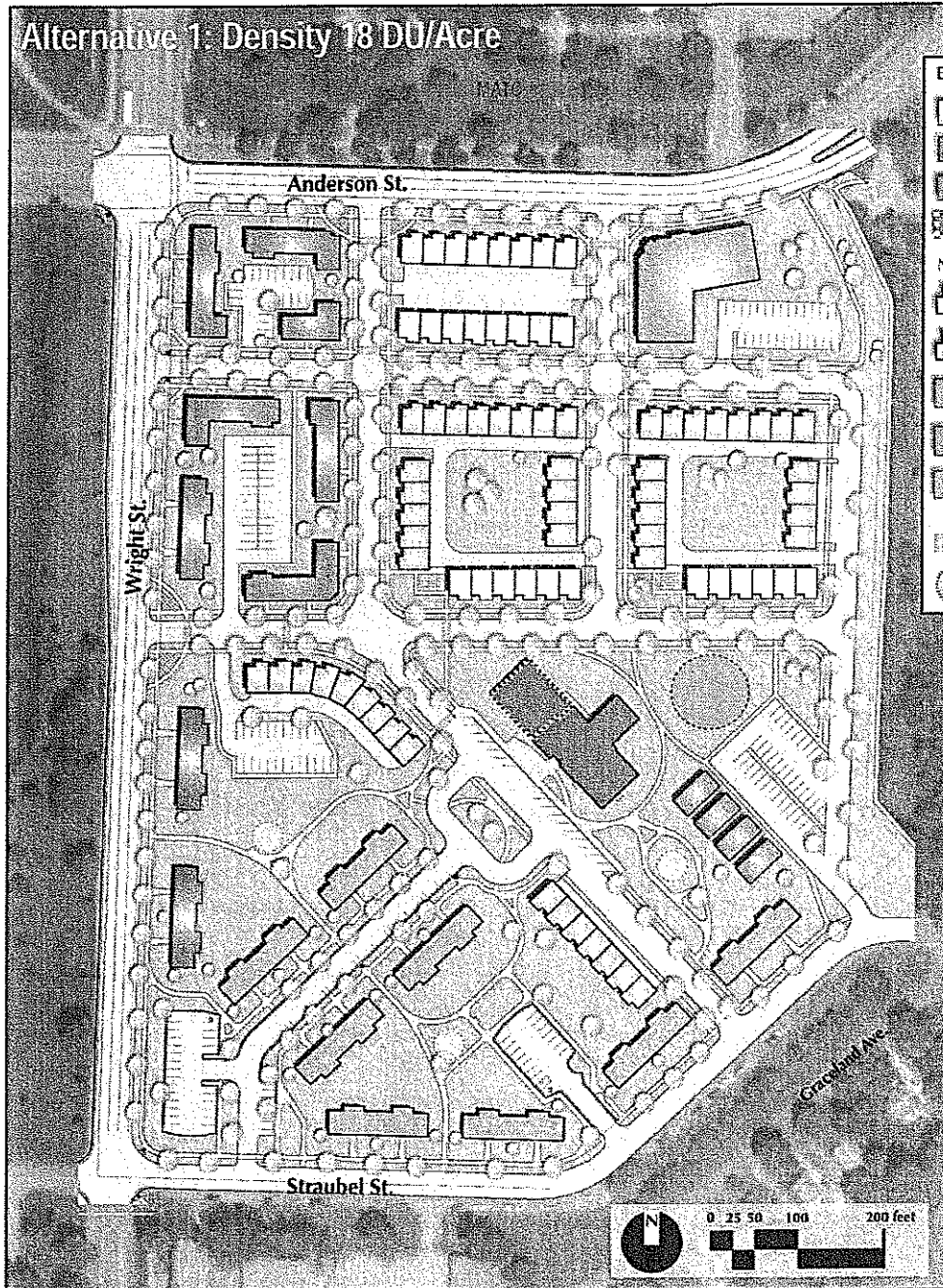
Preliminary cost estimates were prepared for each of the 3 alternatives. These cost estimates are based upon the assumption that it would be a 10 year construction duration (up to year 2018) and are the total cost of construction for each alternative. The following are the approximate cost of construction for each alternative:

Alternative # 1: \$ 67.9 million;

Alternative # 2: \$ 66.6 million;

Alternative # 3: \$ 59.6 million.

Alternative 1: Density 18 DU/Acre



EXISTING BUILDINGS

- 3-Story Apartment
- Remodel Existing Building
- East Madison Community Center
- Community Center Expansion

NEW BUILDINGS

- 2-Story Townhouse; 2/3 Bedrooms; Attached Garage
- 3-Story Townhouse with Flat; 2/3 Bedroom; Attached Garage
- 3-Story Apartment (double-loaded); 2/3/4 Bedroom; Surface Parking
- 3-Story Apartment (single-loaded); 2/3 Bedroom; Surface Parking
- 3-Story 3-Flat; 2 Bedroom; Surface Parking
- Pedestrian Crosswalks
- Community Garden

New Units = 230
 Units Remodeled = 6
TOTAL NEW UNITS = 236

Existing Units on-site = 104

TOTAL UNITS ON-SITE* = 340
 (Existing + New)

Density = 18 DU/Acre

** The number of unit types may vary by +/- 5% and will depend upon the desired bedroom sizes and floor location for each unit type. Additional variables, such as, green spaces could also affect the numbers potentially by more than +/- 5%.*

Alternative 1 Site Plan

	Bedroom size**	Approx. No. of Units
New	2 Bedroom	136
	3 Bedroom	94
	4 Bedroom	6
Existing	2 Bedroom	103
	5 Bedroom	1

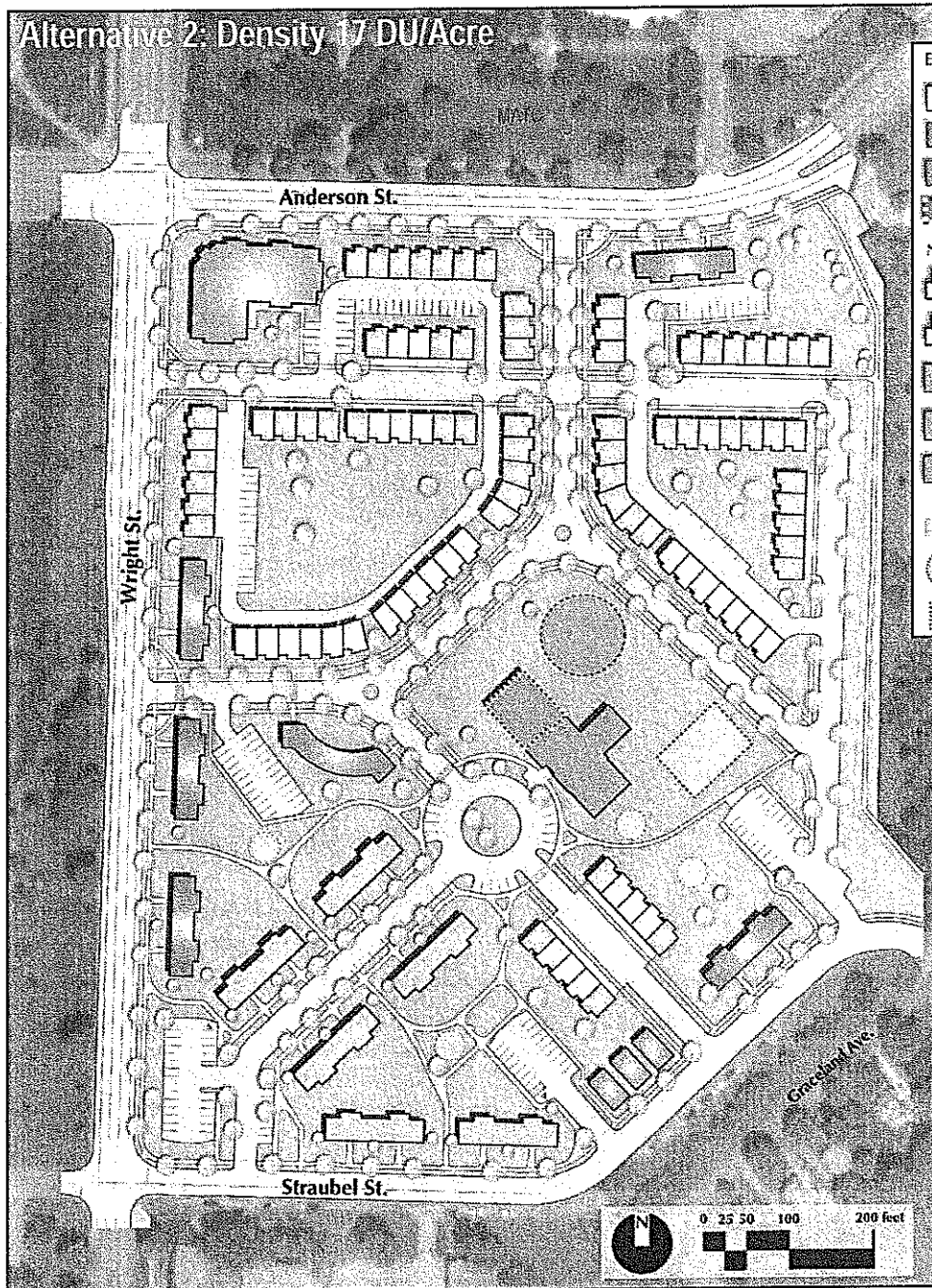
** See Appendix A for assumptions used to calculate the approximate number of units by bedroom sizes (for new units only)

Alternative # 1 Offers:

- All walk-up buildings with a mix of townhouses, flats and apartment buildings;
- Grid like street layout with multiple entries to the site. New gateway entries from Anderson and Wright Streets that lead to the central open space (around the Community Center);
- Minimum contiguous open spaces. Minimum central open space. Maximum area of streets/parking in comparison to other alternatives;
- New pedestrian linkages throughout the site;
- Adequate parking spaces with surface parking and attached garages within building footprint.

ALTERNATIVE FUTURES

Alternative 2: Density 17 DU/Acre



EXISTING BUILDINGS

- 3-Story Apartment
- Remodel Existing Building
- East Madison Community Center
- Community Center Expansion

NEW BUILDINGS

- 2-Story Townhouse; 2/3 Bedrooms; Attached Garage
- 3-Story Townhouse with Flat; 2/3 Bedroom; Attached Garage
- 3-Story Apartment (double-loaded); 2/3/4 Bedroom; Surface Parking
- 3-Story Apartment (single-loaded); 2/3 Bedroom; Surface Parking
- 3-Story 3-Flat; 2 Bedroom; Surface Parking
- Pedestrian Crosswalks
- Community Garden
- Half Basketball Court

New Units = 227
 Units Remodeled = 9
TOTAL NEW UNITS = 236

Existing Units on-site = 88

TOTAL UNITS ON-SITE* = 324
 (Existing + New)

Density = 17 DU/Acre

** The number of unit types may vary by +/- 5% and will depend upon the desired bedroom sizes and floor location for each unit type. Additional variables, such as, green spaces could also affect the numbers potentially by more than +/- 5%.*

Alternative 2 Site Plan

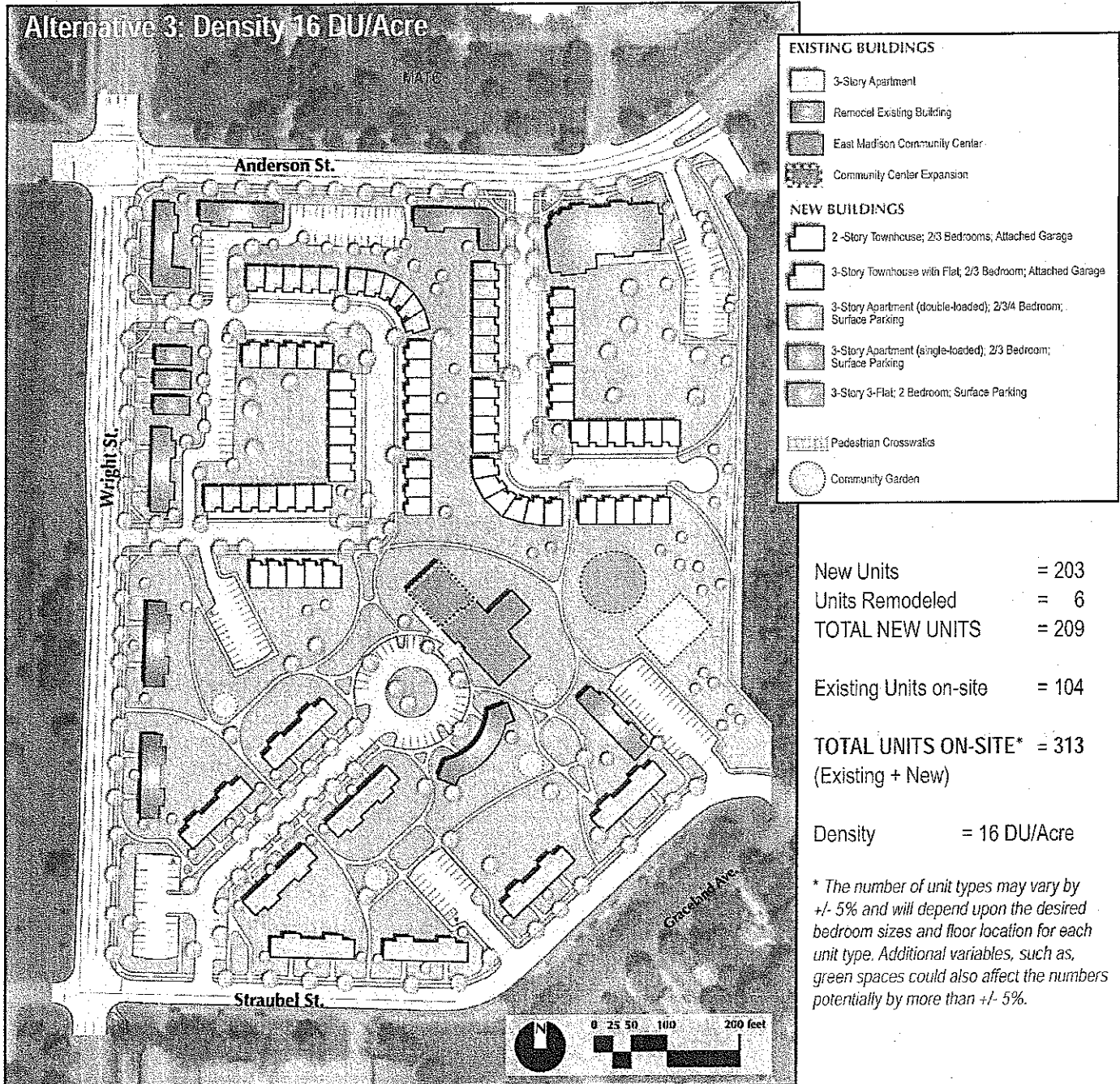
	Bedroom size**	Approx. No. of Units
New	2 Bedroom	132
	3 Bedroom	98
	4 Bedroom	6
Existing	2 Bedroom	87
	5 Bedroom	1

** See Appendix A for assumptions used to calculate the approximate number of units by bedroom sizes (for new units only)

Alternative # 2 Offers:

- All walk-up buildings with a mix of townhouses, flats and apartment buildings;
- Modified grid street layout that creates a central open space as a focal point. New gateway entries from Anderson and Wright Streets that lead to the focal point (around the Community Center);
- Second most area of contiguous open space in comparison to other alternatives;
- New pedestrian linkages throughout the site;
- Adequate parking spaces with surface parking and attached garages within building footprint.

Alternative 3: Density 16 DU/Acre



Alternative 3 Site Plan

Alternative # 3 Offers:

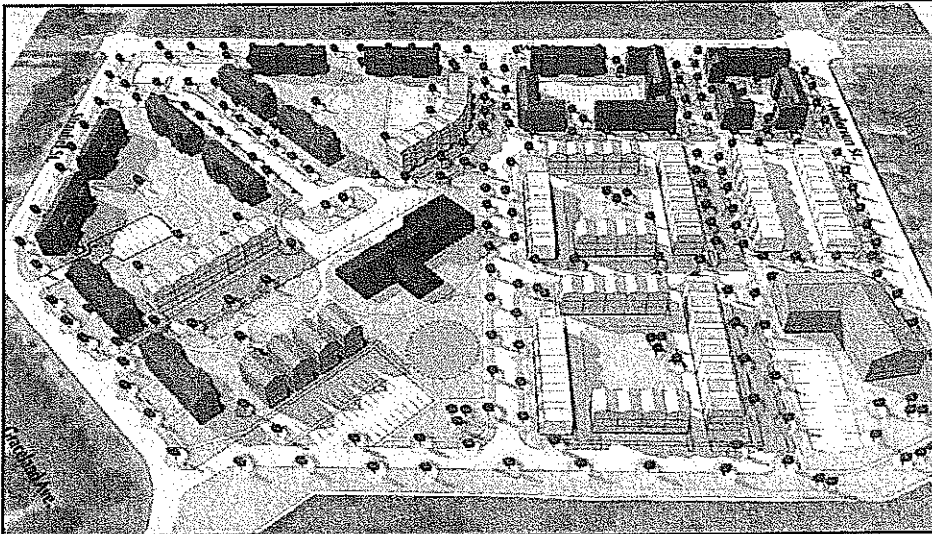
- All walk-up buildings with a mix of townhouses, flats and apartment buildings;
- Loop street layout that creates multiple districts and no new through streets. New gateway entries from Anderson and Wright Streets that lead to the districts;
- Maximum area of contiguous open space that links the site through pedestrian pathways. Maximum central open space (around the Community Center). Minimum area of streets/ parking in comparison to other alternatives;
- Adequate parking spaces with surface parking and attached garages within building footprint.

	Bedroom size**	Approx. No. of Units
New	2 Bedroom	131
	3 Bedroom	72
	4 Bedroom	6
Existing	2 Bedroom	103
	5 Bedroom	1

** See Appendix A for assumptions used to calculate the approximate number of units by bedroom sizes (for new units only)

ALTERNATIVE FUTURES

ALTERNATIVES COMPARISON

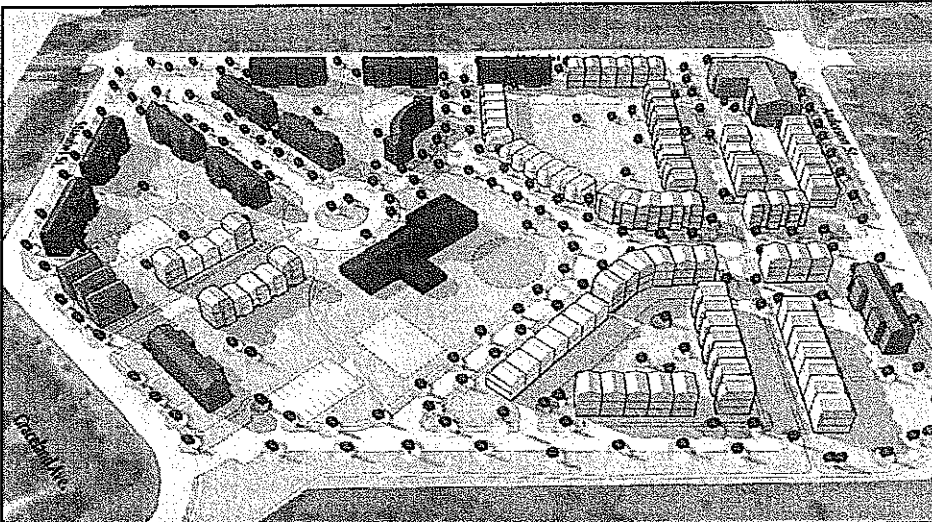


Alternative 1 with a density of 18 DU/Acre: View looking west

Total New Units = 236
Existing Units on-site = 104

TOTAL UNITS ON-SITE = 340
(Existing + New)

Density = 18 DU/acre

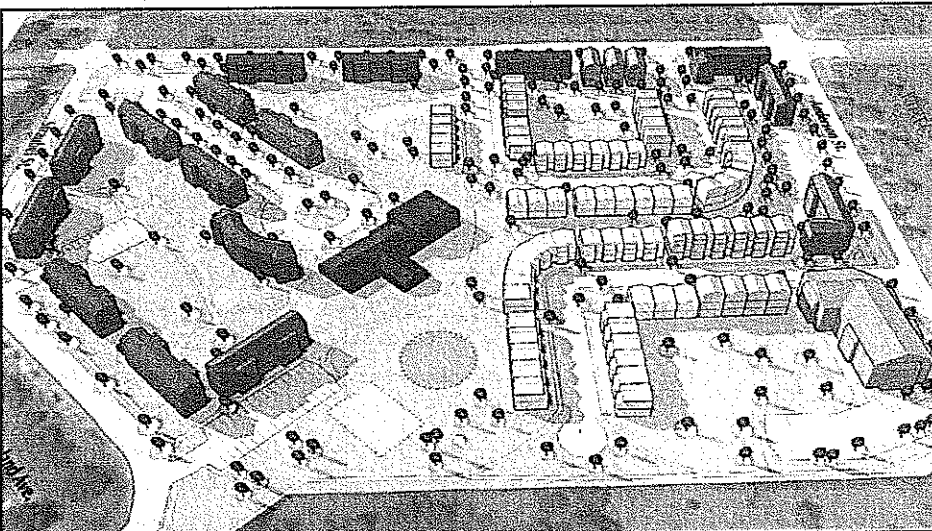


Alternative 2 with a density of 17 DU/Acre: View looking west

Total New Units = 236
Existing Units on-site = 88

TOTAL UNITS ON-SITE = 324
(Existing + New)

Density = 17 DU/acre



Alternative 3 with a density of 16 DU/Acre: View looking west

Total New Units = 209
Existing Units on-site = 104

TOTAL UNITS ON-SITE = 313
(Existing + New)

Density = 16 DU/acre

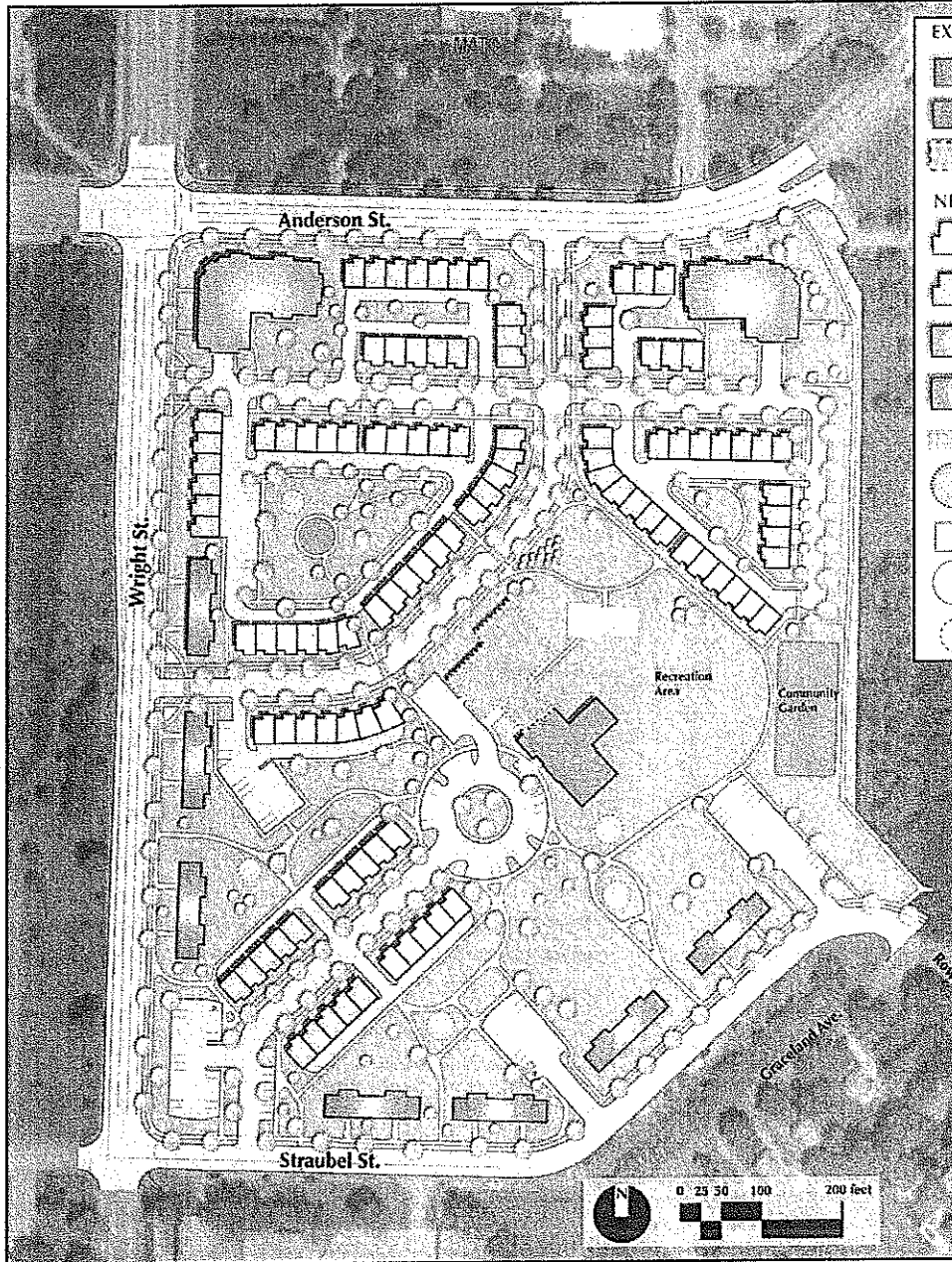
This chapter illustrates the consensus-based master plan that was developed after meetings with the resident community and the Ad-Hoc Committee, where the 3 alternatives were presented and reviewed, in addition to reviews by the City, Police and Fire Departments. This review process resulted in developing key recommendations for the master plan that includes utilizing physical design elements from alternatives 2 and 3. Alternative 1 with highest density, grid-like street layout, and maximum streets with minimum amount of contiguous open space was the least desired alternative and was not considered for developing the preferred master plan.

The consensus-based master plan is designed with a density of 17 dwelling units per acre that falls within the low to medium density range for the City of Madison. The master plan builds upon the guiding principles and the community building elements. The master plan offers the following key elements:

- Maximum amount of open space in comparison to the alternatives;
- Community Center and open space around the Community Center serve as focal point;
- Provision for outdoor recreation areas in addition to the existing Community Center and relocated community garden;
- Additional community park/outdoor gathering space for the residents that is linked to the focal point and rest of the site through a system of pedestrian linkages;
- A combination of walk-up buildings (up to 3-story) and elevator buildings (up to 4-story);
- New street connections with provisions for on-street parking and traffic calming techniques;
- New streets lead to the focal point creating pleasant vistas;
- Buildings front the streets or open spaces with parking to the rear creating a pedestrian friendly environment;
- Preservation of existing utilities and utility easements along the periphery; new east-west streets built upon existing utility easements;
- Accommodate a mix of incomes and populations.

Based upon the preliminary cost estimates that were prepared for each of the 3 alternatives, the construction cost for the Master Plan would range from approximately \$60 million to \$70 million. This is based upon the assumption that it would be a 10-year construction duration (up to year 2018).

PREFERRED MASTER PLAN



EXISTING BUILDINGS

- Remodel Existing 3-Story Apartment Building
- East Madison, Community Center
- Community Center Expansion

NEW BUILDINGS

- 2-Story Townhouse; 2/3 Bedrooms; Attached Garage
- 3-Story Townhouse with Flat; 2/3 Bedroom; Attached Garage
- 4-Story Apartment (double-loaded); 1/2/3/4/5 Bedroom; Half-level Basement Parking
- 3-Story Apartment (single-loaded); 2/3 Bedroom; Surface Parking
- 3-Story 3-Flat; 2 Bedroom; Surface Parking
- Pedestrian Crosswalks
- Relocated Community Garden
- New Outdoor Handball Courts
- Community Park / Outdoor Gathering Space

New Units = 261
 Units Remodeled = 18
TOTAL NEW UNITS = 279

Existing Units on-site = 48

TOTAL UNITS ON-SITE* = 327
 (Existing + New)

Density = 17 DU/Acre

** See Appendix B for detailed building program. The number of unit types may vary by +/- 5% and will depend upon the desired bedroom sizes and floor location for each unit type. Additional variables, such as, green spaces could also affect the numbers potentially by more than +/- 5%.*

Preferred Master Plan

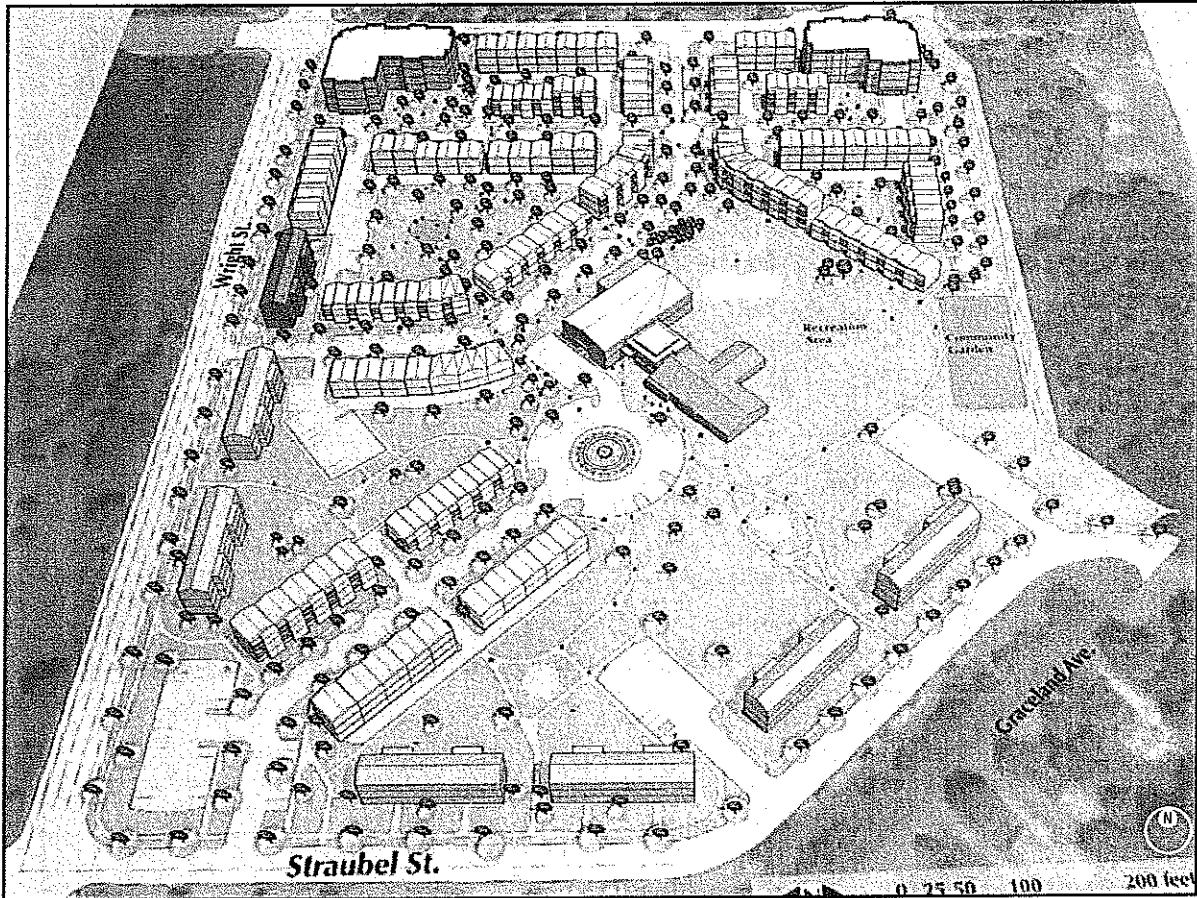
	Bedroom size**	Approx. No. of Units
New	1 Bedroom	11
	2 Bedroom	146
	3 Bedroom	111
	4 Bedroom	4
	5 Bedroom	7
Existing	2 Bedroom	47
	5 Bedroom	1

** See Appendix A for assumptions used to calculate the approximate number of units by bedroom sizes (for new units only)

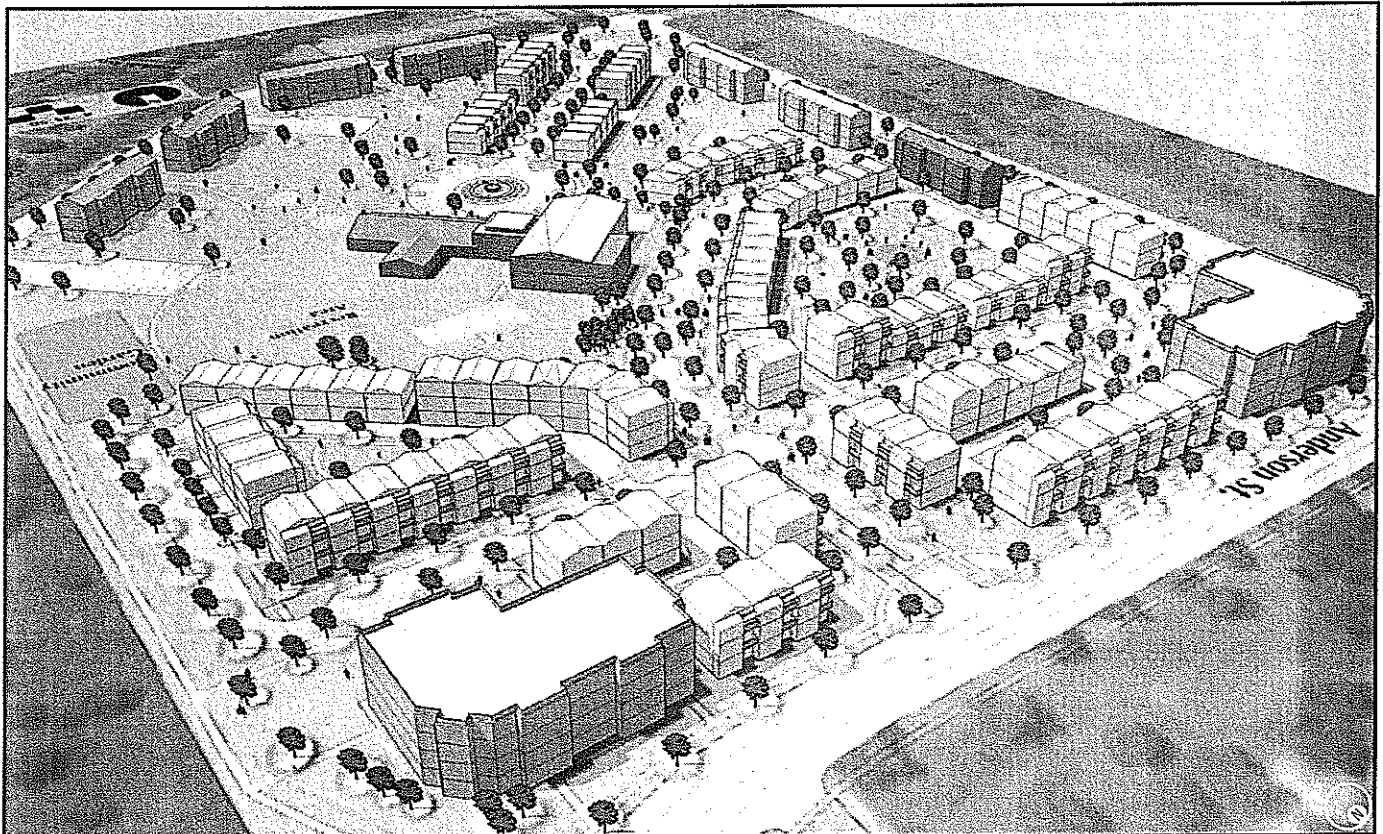
The Preferred Master Plan Offers:

- A combination of walk-up and elevator buildings with a mix of townhouses, and apartment buildings;
- Existing and new housing scattered evenly throughout the site;
- Designed with a modified grid street layout that creates a central open space as a focal point. New gateway entries from Anderson and Wright Streets that lead to the focal point (around the Community Center);
- Maximum area of contiguous open space in comparison to all alternatives;
- New pedestrian linkages throughout the site;
- Adequate parking spaces with surface parking, attached garages and half level basement parking within building footprint.

PREFERRED MASTER PLAN



Preferred Master Plan with a density of 17 DU/Acre: View looking north



Master Plan with a density of 17 DU/Acre: View looking southeast

PREFERRED MASTER PLAN

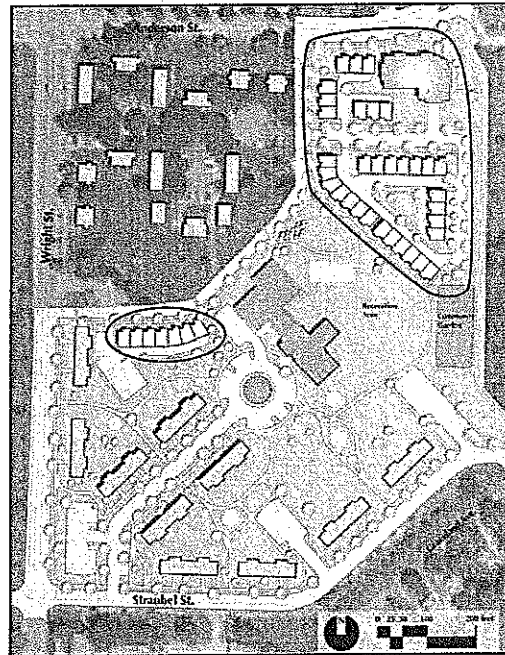
PHASING

The Master Plan is not intended to be built in a single phase, but rather it is recommended that the project be appropriately phased to minimize relocation of existing residents. A 3-step phased program is proposed for this site. This is not intended to be the final phasing plan, but rather offers guidelines for project implementation. Additionally, the following factors for phasing should be considered:

- Availability of funds
- Placement of existing infrastructure
- Ease of implementation
- Availability of existing vacant land on-site
- Minimal disruption to existing housing

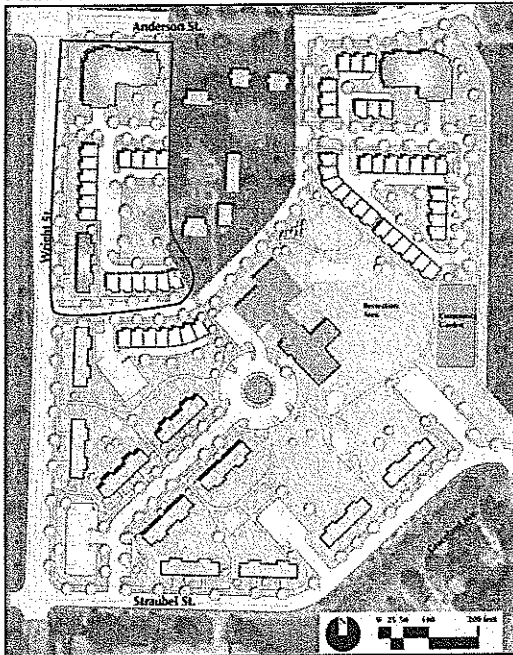
EXISTING BUILDINGS	
	Existing 3-Story Apartment Buildings
	Remodel Existing 3-Story Apartment Building
	East Madison Community Center
	Community Center Expansion
NEW BUILDINGS	
	2-Story Townhouse
	3-Story Townhouse with Flat
	4-Story Apartment (double-loaded)
	3-Story Apartment (single-loaded)

Phase 1



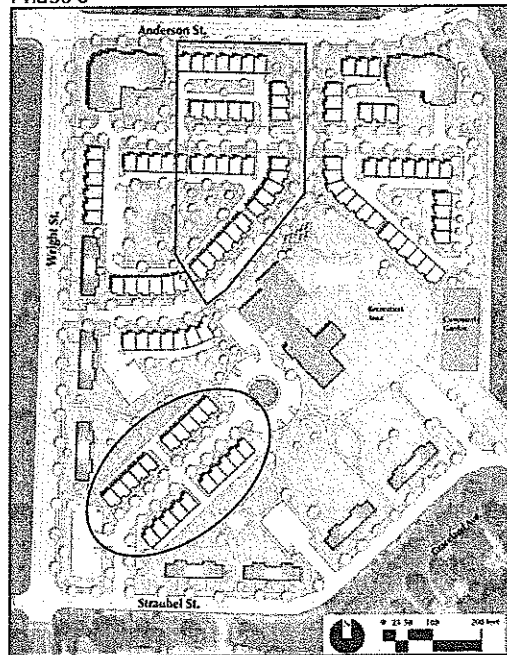
New Units	= 103
Units Remodeled	= 0
TOTAL NEW UNITS	= 103
TOTAL UNITS ON-SITE (Phase 1)	= 250
(147 Existing + 103 New)	

Phase 2



New Units	= 77
Units Remodeled	= 0
TOTAL NEW UNITS	= 77
TOTAL UNITS ON-SITE (Phase 2)	= 305
(125 Existing + 180 New from Phase 1 & 2)	

Phase 3



New Units	= 81
Units Remodeled	= 18
TOTAL NEW UNITS	= 99
TOTAL UNITS ON-SITE (Phase 3)	= 327
(48 Existing + 279 New from Phase 1, 2 & 3)	

NEXT STEPS

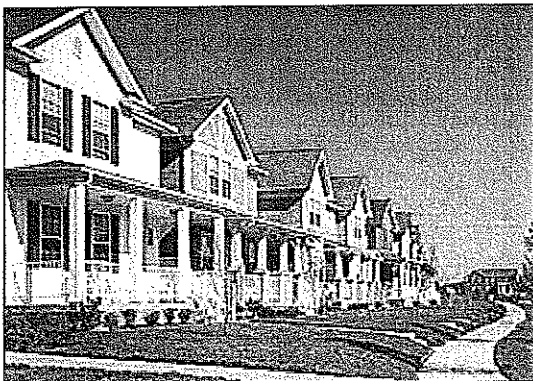
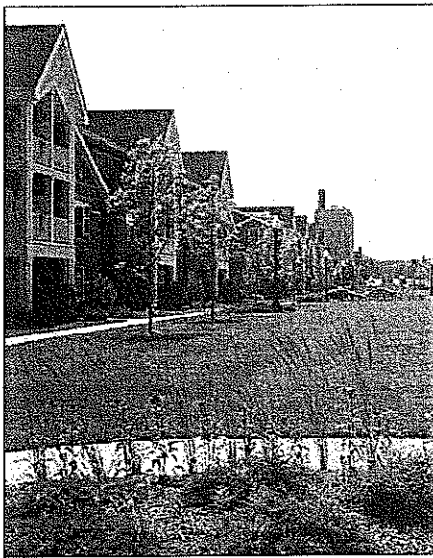
The implementation of the Truax Park Apartments Master Plan will not take place overnight. It will require phased implementation that will take place over time. Plan implementation will therefore require the continued involvement and participation of the CDA, residents, community leaders and other stakeholders. In most instances, the redevelopment of specific areas on-site can occur independently from other areas on-site, specifically the vacant land in the northeast quadrant of the site, and will depend upon the following key steps:

- Identify funding sources
- Develop strategies to improve existing infrastructure
- Determine the desired phasing plan
- Determine the desired unit mix (market-rate, affordable, and low-income housing)
- Identify appropriate marketing strategy to attract new residents
- Determine appropriate architecture for the site

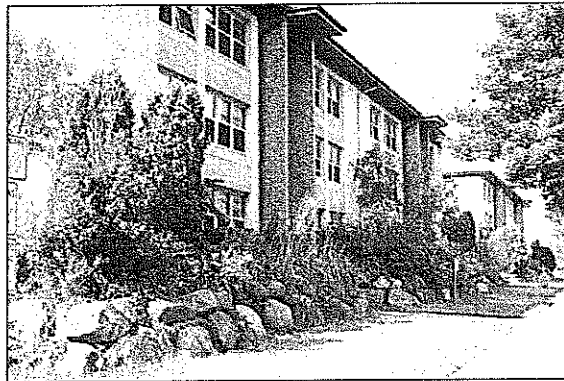
PREFERRED MASTER PLAN

POSSIBLE PROTOTYPES

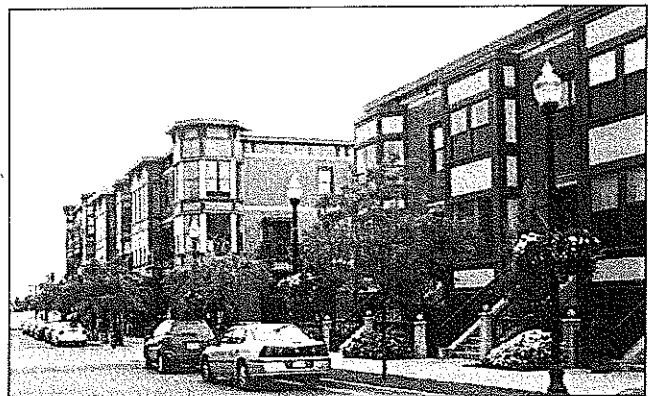
Townhouses and Flats



Single-Loaded Apartment Buildings



Double-Loaded Apartment Buildings



Number of units by building type

- 2 - Story Townhouse = 1 unit
- 3 - Story Townhouse with Flat = 2 units
- 3 - Flats = 3 units
- Double-Loaded Apartment Building* = See assumptions below from 1 to 4.

1 Net areas for each floor level were calculated (all areas in square feet)

A - Total gross area (total area of all buildings by floor)
 20% of gross area assumed for circulation

• Net Area by floor 1 = A - (20% of A)

2 Assumptions for percentage breakdown of number of units by bedroom sizes (by floor). This was done based on the assumption that the units with large bedroom sizes would be located at lower levels.

Floors	1 bedroom	2 bedroom	3 bedroom	4 bedroom	5 bedroom
1st	-	-	20%	40%	40%
2nd	-	50%	50%	-	-
3rd	25%	50%	25%	-	-
4th	25%	50%	50%	-	-

3 Average Area for each unit, by bedroom sizes

- 1 Bedroom = 725 sf (average of 700- 750)
- 2 bedroom = 900 sf (average of 800 - 1000)
- 3 bedroom = 1,200 sf (average of 1100 - 1300)
- 4 bedroom = 1,350 sf (average of 1300 - 1400)
- 5 bedroom = 1,450 sf (average of 1400 - 1500)

4 Formula used to calculate approximate number of units = 1 x 2 / 3

5 Number of bathrooms per unit by bedroom

- 1 Bedroom = 1
- 2 bedroom = 1.5
- 3 bedroom = 2
- 4 bedroom = 2.5
- 5 bedroom = 3

5 Number of parking spaces

- Parking Ratio = 1:1 (1 space per unit for all new units)
- Townhouses = 2-car attached garage within building footprint
- Single-loaded apartment buildings = surface parking
- Double-loaded apartment building = Surface parking for the 3 alternatives;
 = Half Level basement parking within building footprint for preferred Master Plan

APPENDIX B

Building Program - Preferred Plan (Assumptions)

128 - New Units (2 & 3 B.R.) Market Rate							
Building Type	Unit Mix					Total Units	Parking
	1 Bedroom	2 Bedroom	3 Bedroom	4 bedroom	5 Bedroom		
A: 2-Story Townhouse		28	16			44	Attached 2-car Garage*
B: 3-Story Townhouse w/Flat		24	29			53	Attached 2-car Garage*
C: Double-Loaded Apartment Bld.		10	6			16	Half Level Basement Parking**
D: Single-Loaded Apartment Bld.			3			3	Surface Parking
F: Remodel Existing		6	6			12	Surface Parking
TOTAL	0	68	60	0	0	128	

52 - New Units (2 & 3 B.R.) Affordable							
Building Type	Unit Mix					Total Units	Parking
	1 Bedroom	2 Bedroom	3 Bedroom	4 bedroom	5 Bedroom		
A: 2-Story Townhouse						0	Attached 2-car Garage*
B: 3-Story Townhouse w/Flat		11	14			25	Attached 2-car Garage*
C: Double-Loaded Apartment Bld.		6	12			18	Half Level Basement Parking**
D: Single-Loaded Apartment Bld.		3				3	Surface Parking
F: Remodel Existing		6				6	Surface Parking
TOTAL	0	26	26	0	0	52	

99 - New Units (1,2, 3, 4, 5 B.R.) Low Income							
Building Type	Unit Mix					Total Units	Parking
	1 Bedroom	2 Bedroom	3 Bedroom	4 bedroom	5 Bedroom		
A: 2-Story Townhouse						0	Attached 2-car Garage*
B: 3-Story Townhouse w/Flat		29	21			50	Attached 2-car Garage*
C: Double-Loaded Apartment Bld.		11	20	4	4	7	Half Level Basement Parking**
D: Single-Loaded Apartment Bld.			3			3	Surface Parking
F: Remodel Existing						0	Surface Parking
TOTAL	11	52	25	4	7	99	

OVERALL TOTAL	11	146	111	4	7	279
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- * Garage within Building Footprint at first floor level
- ** Half Level Basement Parking within Building Footprint

Building Type & bedroom sizes

Building Type	1 Bedroom	2 Bedroom	3 Bedroom	4 bedroom	5 Bedroom	Total New Units
A: 2-Story Townhouse		28	16			44
B: 3-Story Townhouse w/Flat		64	64			128
C: Double-Loaded Apartment Bld.	11	36	22	4	7	80
D: Single-Loaded Apartment Bld.		6	3	0		9
F: Remodel Existing		12	6	0		18
TOTAL	11	146	111	4	7	279

No. of bathrooms	1	1.5	2	2.5	3
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Square Feet/Bedroom	Avg. = 725 sf	800-1,000 sf Avg. = 900 sf	1100 - 1300 Avg. = 1200 sf	1350 s.f	1450 s.f
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