

CDD Financing Application for Affordable Housing Fund (AHF-TC)

This application form should be used for projects seeking City of Madison AHF-TC funds Request for Proposals #13059-2024. Please format for logical page breaks. Applications must be submitted electronically to the City of Madison Community Development Division by **noon on August 1, 2024**. Email to: cddapplications@cityofmadison.com

APPLICANT INFORMATION

Development Name:	Merchant Place Senior		
Site Address:	6702 Odana Rd Madison, WI 59719		
Amount of Funds Requested:	\$2,500,000	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Lead Applicant:	Northpointe Development		
Mailing Address:	230 Ohio Street STE 200 Oshkosh WI 54902		
Telephone:	608-334-5665		
Admin Contact:	Sean O'Brien	Email Address:	sean@northpointedev.com
Lead Project Contact:	Sean O'Brien	Email Address:	sean@northpointedev.com
Financial Contact:	Sean O'Brien	Email Address:	sean@northpointedev.com
Website:	Northpointedev.com		
Legal Status of Maj. Owner:	<input checked="" type="checkbox"/> For-profit <input type="checkbox"/> Non-profit	LIHTC Application:	<input checked="" type="checkbox"/> 4% only <input type="checkbox"/> 4+4% <input type="checkbox"/> 9%
Anticipated WHEDA Set-Aside:	<input checked="" type="checkbox"/> General <input type="checkbox"/> Preservation <input type="checkbox"/> Non-Profit <input type="checkbox"/> Supportive Housing		
Federal EIN:	85-1243046	SAM/ UEI #:	JUGXJNKZ

* If seeking federal funds

AFFIRMATIVE ACTION

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

LOBBYING RESIGTRATION

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

CITY OF MADISON CONTRACTS

If funded, applicant agrees to comply with all applicable local, state and federal provisions. A sample contract that includes standard provisions may be obtained on the Community Development Division Funding Opportunities Website for this RFP.

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

SIGNATURE OF APPLICANT

Enter Name: Sean O'Brien Date: 7/23/2024

By submitting this application, I affirm that the statements and representations are true to the best of my knowledge. By entering your initials in this box **SO** you are electronically signing your name as the submitter of the application and agree to the terms listed above.

AFFORDABLE HOUSING GOALS & OBJECTIVES

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

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

AFFORDABLE HOUSING NEEDS, BENEFIT AND RISK

2. Please describe the anticipated demand for this specific affordable rental housing in the City of Madison.

Demand for affordable housing in Madison has remained strong. Our nearby west side development, Uno Terrace, opened in August of 2023, reached full occupancy in a few months and has remained full. Also, the 124 unit phase I project will contain a community service facility that will be occupied by our support service provider and case management staff making the location more desirable to the target population. Northpointe Development has delivered high quality, desirable housing in the Dane County Market. Our Dane County portfolio is currently at 100% occupancy.

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

Great Midwest Bak currently owns this site which has been deemed a TOD area of the city as it will be nearby the BRT line. The current improvements carry a lower tax base. Besides the benefit of quality and sustainable affordable housing, the project will generate a significant tax base for the site in a way only possible by combining the phase I (MP 124 unit) and Phase II projects as they will share a driveway entrance. This project will also act as a catalyst for other development along the Odana corridor. The proposed plan and city investment will allow this project to move forward without the risk of the competitive tax credit program which would provide certainty to the city with a new QAP and scoring metrics to be published later this year. Lastly, the project is partnering with Wayforward to house and provide services to those that are currently homeless or at risk of homelessness. Some of the risks of the project include securing the other gap financing listed in the application and standard market variables of affordable housing development. However, one benefit of the proposed application is that the project team will know the status of the other sources prior to an award by the city. Securing all necessary gap financing including non-competitive tax credits allows the project to be built in summer of 2025 at the same time as phase I, creating construction and pricing efficiencies, and reducing housing market risks faced by projects starting in late 2025 or 2026.

PROPOSAL DESCRIPTION

4. Please provide a brief overview of the proposal including key characteristics. Describe how the proposed development will help meet the needs of residents in this location and the impact of the proposed development on the community. *(Please limit response to 300 words including spaces).*

Northpointe Development and Selassie Development are proposing to construct Merchant Place Senior, a newly constructed mixed-use 60 unit LIHTC multifamily development on the west side of the City of Madison, Wisconsin. The development will consist of the new construction of 1, four- story elevatored building containing 38, one bedroom/one bathroom units and 22, two bedroom/twobathroom units for a total of 60 rental units targeting senior households. The Developer proposes to set aside all of the units for residents earning 30, 50, or 80 percent or less of the Dane County AMI using the LIHTC Program.

The project will be built to Wisconsin Green Built Gold Standards and will also receive Energy Star New Construction and EPA Indoor Air Plus Certifications. We are planning to have a 70 KW PV Solar System on the roof of the building to eliminate approximatley 90% of the buildings common area electrical usage. The project will have high quality materials including LVT flooring and solid surface countertops.

The project is located in a Qualified Cenus Tract which will qualifies for a 130% basis boost in equity and as a non-competitive tax credit application is only required to score 120 points for an allocation of credit.

The project is located in a Qualified Cenus Tract and we workig with Wayforward (formally Middleton Outreach Ministry) who will occupy 1000 sq/ft of commerical space at \$1 per year in phase I. Wayforward plans to use the space as offices for Case Management Services as well as a partial food pantry. Refridgerators and other equipment will be provided to allow Wayforward to hand out food bags and other items to families in need. Also, Wayforward views this space as a great opportunity to bring Case Management services closer to the residents they serve in other surrounding affordable housing properties. For phase I, we are in the process of securing HOME-ARP funds which would provide \$285,000 to Wayforward to provide case management services to the target population. This would be in addition to funds committed to Wayforward out of both projects operational budgets.

The proposal meets a significant number of priorities identified by the City including: New Development in areas of the city with strong connections. Our site is located on a major thoroughfare and very walkable to a significant amount of employment opportunities, schools, public transportation, grocery, etc. 20% of the units will be set aside at 30% CMI which is a significant commitment for a non-competitive LIHTC project as there will be less overall equity available to the project. The property will work with a local support service provider (Wayforward) to house homeless and formerly homeless individuals and coordinate or provide a level of services that meet the tenant needs. The units will not allow smoking and will provide internet at no cost to the residents.

The project will be rent restricted in perpetuity as we plan to have an non-ending LURA with the City of Madison.

Lastly, we plan to work with the BCycle program to install Ebike Stations at the property. Tenants will have access to memberships at no cost.

5. Please describe the following aspects of the proposed development:

- Type of Construction: New Construction Acquisition/Rehab or Preservation
- Type of Project: Multi-family Senior (55+ or 62+ yr. old): 55+

Total number of units: 60
 Total number affordable of units (≤60% CMI): 60 Total % affordable of units (≤60% CMI): 100
 Total amount of AHF requested per affordable unit: 41,666
 Number of units supported by Section 8 project-based vouchers, if known: 0 PBV CMI level: 0

6. Please indicate acceptance of the standard loan terms for this proposal as described in Section 1.4 of the RFP.

Yes, I confirm.

7. Applicants requesting alternative loan terms and/or wishing to provide additional information regarding the financing structure or options, please indicate below.

1/2 long-term deferred note waiving the shared appreciation for permanent affordability. 1/2 cash flow promissory note

8. Period of Affordability Commitment:

- Permanent Affordability in exchange for a waiver of shared appreciation to the long-term deferred note
- 40 years – Minimum Commitment

9. Will the development team commit to making annual payments on the AHF Cash Flow Note concurrently with repayment of the deferred developer fee? If yes, explain how this will be memorialized in organizational documents, including the final Amended and Restated Operating Agreement. If not, what year will Cash Flow Payments begin?

The project anticipates to defer over 50% of the developer fee to fill the financing gap on the project. The plan would be to fully repay the deferred fee and then start making cash flow payments on the cash flow note. Projections show that that these payments would begin in year 13 if not sooner

10. Are there any terms of anticipated funding sources anticipated to be incongruent with this RFP? Please explain.

No

SITE INFORMATION

11. Address of Proposed Site: **6702 Odana Rd, Madison, WI 53719**

12. In which of the following areas on the Affordable Housing Targeted Area Map (see Attachment A) is the site proposed located? Please check one of the first three AND Limited Eligibility, if applicable.

- Preferred TOD Area
- Eligible Core Transit Area
- Preservation & Rehab Area (Ineligible for New Construction)
- Limited Eligibility Area

13. Identify the neighborhood in which the site is located: NA

14. Date Site Control Secured: April 4, 2024

15. Explain why this site was chosen and how it helps the City to expand affordable housing opportunities in areas of greatest impact. Describe the neighborhood and surrounding community. (Attach a close-up map of the site indicating project location and a second map using the [AHF Targeted Area Map](#) to show the site in the context of the City.)

The site is located at the intersection of Odana and Grand Canyon Drive. We chose this site as the west side of madison has been historically underserved by new affordable housing developments and this areas focus to growth and redevelopment. From a real estate perspective, this site is large enough for redevelopment and is in close proximity to amenities and jobs that will increase the quality of life for our residents. A majority of the area is surrounded by single story retail uses. Northpointe and Selassie are developing the two parcels to the west, 6706-6714, and view this as an opportunity to fully develop to the corner in a way that best utilizes access and driveways. In other words, if 6702 Odana were to be redeveloped by a separate developer, the size of the site could prohibit the highest and best use.

16. Current zoning of the site: CC An interactive version of the Zoning Map can be found linked [here](#).

17. Will the proposed development seek a Zoning Map Amendment:

- Yes
- No, it's permissively zoned
- To be determined

18. Describe any other necessary planning and zoning-related approvals (conditional use permit, demolition, etc.) that must be obtained for the proposal to move forward.

Conditional Use Permit and Demo Permit

19. Describe the proposed project’s consistency with the land use recommendations, goals and objectives as may be relevant in adopted [plans](#), including the City of Madison Comprehensive Plan (adopted 2018), Neighborhood Plans, Special Area Plans, the Generalized Future Land Use Map (interactive version linked [here](#)), and any other relevant [plans](#).

The site is part of the Odana Area Plan and is targeted as a future growth area which implements goals in the City's Comprehensive plan. The Odana plan calls for a mixture of uses in the area including housing and the project meets the height and density of the future land use map.

20. If the site is in a Limited Eligibility Area, describe how the relevant concerns will be addressed via design or other strategies, e.g., noise mitigation, air quality, etc.?

N/A

21. Identify the distance the following amenities are from the proposed site. Limit to closest three and/or less than one mile per category. Please limit list to the closest three amenities within one mile per category. Please use the MMSD Find My School [link](#) as the closest school is not always assigned.

Type of Amenities & Services	Name of Facility	Distance from Site (in miles)
Full Service Grocery Store	Metcalfe's West Towne	.7
Public Elementary School	John Muir Elementary	.9
Public Middle School	Gillespie	.6
Public High School	Madison Memorial	.5
Job-Training Facility, Community College, or Continuing Education Programs	The Medical Education Institute	.8
Childcare	Koal-T-Kare	.3
Public Library	Alicia Ashman Branch	1.64
Neighborhood or Community Center	Lussier Community Center	.6
Full Service Medical Clinic or Hospital	UW Health Urgent Care	.5
Pharmacy	CVS	.2
Public Park or Hiking/Biking Trail	Mineral Point Park	.5
Banking	UWCU	.35 mi
Retail	Market Square Shopping Center	1.24 mi
B-cycle Station		
Other (list the amenities):	West Town Mall, Woodmans West Woodmans West	.3 .6

22. What is the actual [walking](#) distance (in miles) between the proposed site and the nearest seven-day per week [transit stops](#) (i.e. weekday and weekends)? List the frequency of service at that bus stop during the weekday at noon. List the bus route(s), major transit stop street intersections and describe any other transit stops (include street intersections and schedule) located near the proposed site. Please do not include full bus schedules.

There is a 7 day service stop adjacent to the site at Odana and Grand Caynon and higher service at the Mineral Point and Grand Canyon intersection. The BRT line will run along Mineral Point Road and the site is less than 1/4 mile away. According to the schedule on Madison metro, the H & J route has a bus running daily and route 67 along Mineral point.

23. Describe the walkability of the site and the safest walking routes for children to get to their elementary and middle schools if MMSD [Yellow Bus Service](#) is not provided (e.g., less than 1.5 miles and no major roads crossed). Describe the Metro Transit Route for high school students. Enter "N/A" for age restricted (55+) developments.

Both Phase I and this project will provide an easement to the city of Madison to provide a walking path that connects Grand Canyon at the north of the site and continue through the east side of the regional pond to Mineral point road to provide access to the Elementary, Middle and High schools.

The city's bus system serves high school students, with many routes running through residential areas to major destinations, including high schools. Buses run frequently during peak school hours to accommodate student schedules. Strategically placed near schools, major thoroughfares, and typically within a few blocks to ensure minimal walking distance.

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

The site is walkable with many of the amenities listed above being less than .5 miles from the site. The site has a bus stop adjacent feet and will be located less than .25 miles from the new BRT line. There are many food options including Metcalfs, Walgreens, woodmans, and restaurants near the site. After school activities are within walking distance. The nearest library public library is 1.5 miles from the site but residents will have access to books etc at the Lussier Community Center. The property will offer parking and there will be ample parking on-site as well as B-Cycle access for residents. There are thousands of jobs located near the site with major employers recently coming into the area including Exact Sciencies and Nexus. Communities like Verona and Middleton have significant job centers and are both a 5-10 minute drive from the site. Lastly, the project will work with B-Cycle to provide e-bikes with free memberships that the residents can use

25. Describe the impact this housing development will have on the schools in this area. What percent are the 5-year projected capacities for the area schools? Ideal enrollment is considered 90%. Are the schools projected to be at, above, or below capacity? Approximately how many elementary and middle school children are projected to live at the proposed housing development based on the proposed unit mix and previous housing experience? See 5-year projected capacities from 2019 school capacity information found in this [Report](#) (.pdf pages 30-31). MMSD is in the process of updating this information post-pandemic. Please also e-mail Grady Brown (kgbrown@madison.k12.wi.us) to obtain updated current and projected capacity for the relevant schools.

NA for senior- however; The report shows that in general, the number of children attending Madison schools is expected to decline over the next 5 years. The site is located nearest to the Muir Elementary School which is at 82% capacity and Gillespie Middleschool witch is at 78% capacity. The schools are projected to be at 86% and 77% respectilvy in 5 years.

SITE AMENITIES

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

There will also be outdoor amenities including an outdoor patio and picnic area and underground parking. The city plans to add new walking paths in the near future. The property manager will cordinate onsite activites. An MOU has been signed with Wayforward to provide a service coordinator at the project to work with all tenants but especially the supportive housing target population. Another MOU will be signed with Dane County Vets office to provider services to the Vet households. We intend to work with Bcycle to provide Ebikes at the site for no cost to the residents.

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

The interior common area amenities will include a community room and excersise room. The proeject will also provide a computer and printer workstation for the residents.

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

The unit will have LVP flooring, solid surface countertops, stainless steel appliances, washer and dryer included, balconies, and internet fiber directly installed to the units with free internet for tenants to use. The building will be non-smoking. The units are sized appropriately and will have the proper number of bathrooms in the unit. The building will obtain an EPA indoor Air Plus certification meaning fresh air will always be circulated in the common areas and unit kitchen and bath fans will continuously circulate air to the outside of the unit.

29. In regards to parking, what is the:

a. Anticipated number of total number parking spots:	71
i. Underground	--45
ii. Surface	--26
b. Ratio of parking spots to units?	1.18:1
c. Monthly parking cost?	0
d. Will the parking cost in this development vary by CMI level?	

Brief further comments regarding parking fees may be added here:

no fees will be charged for underground or surface parking.

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

There will be approximately 1,000 sq ft of commercial space. The goal will be to lease this space to a tenant currently occupying the White House Shops (phase I) so that the business can remain in the neighborhood. We will be looking for a neighborhood-serving tenant as a backup.

CITY AND COMMUNITY ENGAGEMENT PROCESSES

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

We have had many discussions with staff regarding this parcel but held our official Pre-Application meeting 7/24. Comments were positive on the use of the site and it was questioned if more housing could be provided. After internal discussions we felt that sticking with 4 stories at this time was the best course given the combined density of this project and phase I in terms of both housing and retail uses.

32. Briefly summarize the most notable staff comments made at the City's Development Assistance Team (DAT) regarding the proposed development and reference the date of the presentation. If this proposal has not yet presented to DAT, what is the anticipated date of the presentation?

The development team plans to meet with DAT on 8/1/2024 and comments will be shared after the meeting is held. We also have to work with Park Towne Management to confirm that the new TOD set-backs will be acceptable; however we don't foresee any issues.

33. Describe the response of the alderperson in which the proposal is located, as well as the adjacent alderperson(s), if within 200 feet of an adjacent [Aldermanic District](#). What issues or concerns with the project did they identify, if any? How will those be addressed?

We have reached out to the local Alder for District 19 on July 24th, 2024. The Alder didn't have any concerns initially when verbally describing the project. Neighborhood Meeting date TBD at this writing but planned for the week of the August 19. Phase I held a meeting in 2022 that wasn't well attended given its proximity to a neighborhood. Comments at that meeting were all positive.

34. Describe the neighborhood and community input process to date, including notification to and input from the nearby Neighborhood Association(s). What was the date that the proposal was presented to the neighborhood? If not yet

completed, what is the anticipated meeting date? What issues or concerns with the project has been identified, if any? How will those be addressed? Describe the plan for continued neighborhood input on the development (e.g. steering committee, informational meetings, project website, etc.).

Since this project isn't in a traditional neighborhood we don't anticipate any issues or concern as proven on phase I.

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

We will work with our alder to communicate with the neighborhoods. Since this project isn't in a traditional neighborhood we will rely on their guidance and expertise which is what we did at our phase I project. This included speaking with the school principals and community center staff. About 4 months prior to occupancy we will begin meeting with our property manager, City of Madison, and service providers to discuss marketing and referrals. This has worked well on our previous projects.

DEVELOPMENT TEAM

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

Contact Person	Company	Role in Development	E-mail	Phone
Sean O'Brien	Northpointe Development	Developer	sean@northpointe.com	608-334-5665
Sam Haile	Selassie Development	Developer	selassiedevelopmentllc@gmail.com	608-535-5131
Bob Feller	Knothe Bruce	Architect	bfeller@knothebruce.com	608-836-3690
Chris Hand	ACC	Property Management	chris@accmanagment.com	920-966-9905
Bill Cummings	Reinhart	Attorney	wcummings@reinhartlaw.com	414-298-8330
Ellen Carlson	Wayforward	Support Service	ellen@wayforwardresources.org	608-826-3404
Heather Campbell	Dane County VA	Support Service	Heather.Campbell3@va.gov	

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

Please see attached org chart. The proejct will be manager managed LLC as you would see typcially for a tax credit development. The MM will be owned 76% by Northpointe Development II Corporation and 24% owned by Selassie Development.

38. Describe briefly the Development Team's knowledge of and experience in addressing affordable housing needs of the City of Madison. Please be sure to address:

- a. Experience developing multifamily housing for low- and moderate-income households, including:
 - i. Experience obtaining and implementing LIHTC, including number, type and location of proposed and completed LIHTC projects and/or affordable housing units your organization has developed.
 - ii. Experience obtaining and implementing federal, state, city and other financing resources, including number of projects, number of units and location of projects with federal LIHTC, HOME, CDBG, or Section 108 funds.
- b. Developer's experience with, including number of projects, number of units and location developed with integrated supportive housing units.

- c. Leadership/key development team staff qualifications (briefly). Years the organization has been in existence.
- d. Financial capacity of the organization to secure financing and complete the proposed project.
- e. For non-profit organizations and/or co-developers, please describe the organization’s Mission Statement and explain how the proposed development supports the Mission Statement.

Please limit responses to three pages within this application format or enter “See Attached.” Please do not duplicate information here and attached.

Please see attached resumes for Northpointe and Selassie. This will be the third Madison LIHTC project constructed by members of the development team which includes our 64 unit Uno Terrace project and our to-be-developed 124 unit Merchant Place Apartment project.

39. For projects that will be co-developed with a non-profit partner, please describe the non-profit’s role in the development. State if the non-profit will have a controlling interest (as memorialized in organizational documents), Right of First Refusal, or General Partner Purchase Option. If not, please elaborate on how the non-profit organization will be involved in the long-term ownership of the development. Describe briefly the compensation structure for non-profit developer, including percentage of the developer fee allocated.

The project will not be co-developed by a non-profit.

40. For non-profit applicants interested in federal HOME funds, please describe in detail the development team’s experience using HOME funds, including a list of projects the team has developed using such funds. Is the Non-Profit Organization certified as a CHDO? If not, please indicate interest in CHDO certification. Please enter N/A if this question does not apply.

N/A

41. Who will be responsible for monitoring compliance with federal regulations and requirements during development and construction phases of the project? List past projects they have completed with similar compliance requirements.

Northpointe Development and Connery. See attached resume

42. Who will be responsible for monitoring compliance with federal regulations and requirements during the Period of Affordability? Please describe the experience of the property management agency including trainings and/or certifications that the individual/property management agency has completed and/or attained.

ACC Management- please see attached resume

43. What other major sources of soft funding are being sought for the proposed development (e.g., TIF, Dane County AHDF, Federal Home Loan Bank Affordable Housing Program, Dane Workforce Housing Fund, etc.)? What is the status of those funds and anticipated commitment dates? Describe the development team’s experience in successfully obtaining funds from the sources sought for the proposed development.

The project has submitted an application for Dane County AHDF. Our team has significant experience with these competitive applications. Also, we believe that there will be cost efficiencies if this project is developed at the same time as phase I.

44. For projects led or co-developed with a BIPOC or minority developer, please explain the BIPOC or minority developer role in the development. State what percentage stake the BIPOC or minority developer will have in the development, development fee split, cash flow, etc. (as memorialized in organizational documents). If the development team will partner with a BIPOC or minority developer, but will not maintain a stake in the organization structure, please explain

this decision and elaborate on how the BIPOC or minority developer will be involved in the long-term ownership of the development.

Selassie Development is a BIPOC development firm. Both firms will have an extensive roll in the development from entitlements through lease up and ongoing operations of the development. Northpointe and Selassie will work together on all decisions and both will be involved in all facets of the development. Selassie will receive 24% ownership included voting rights and cash flow.

45. Describe this development team’s experience in or plans to offer a development partnership role, employment or meaningful internship opportunity to a graduate or student of the Associates in Commercial Real Estate (ACRE) program on this or another project?

Northpointe and Selassie partnered on Phase I. Northpointe has created a paid fellowship program for emerging developers like Selassie to gain more knowledge and experience in all facets of real estate development and operations.

46. Please describe the development team’s experience with contracting with Minority- and Women-Owned Business Enterprises (M/WBE). Beyond standard construction bidding practices, what efforts have been made by the development team to ensure that M/WBE businesses are awarded contracts, and what efforts will be made to ensure that M/WBE businesses are given plentiful opportunities to be competitive when bidding on this proposal and awarded a percentage of the contracts that meets or exceeds the City’s 25% goal as aligned with WHEDA’s EBE program.

Our Uno project exceeded 25% EBE and 34% minority workforce.

47. Beyond standard construction bidding practices, to what efforts will the development team commit to ensure that women and people of color represent a meaningful share of the construction labor force working on this proposal. Describe how the development team will commit to exceeding the City’s contract labor utilization goal of 13% for persons of color working on the job site.

See above, Uno terrace had 34% minority workforce participation.

48. For the following development team roles, please identify the number and/or percentage of women and persons of color employed by that company or organization as well as the total employees for each firm.

Company	Role in Development	BIPOC		Women		Total Employees
		#	%	#	%	#
Northpointe Development	Developer	0	0	3	75	
Selassie Development	Co-Developer	1	100	0	0	1
	Co-Developer					
TBD	General Contractor					
ACC	Property Manager	52	19	132	49	265
Knothe & Bruce	Architect	1	4	4	36	25
Wayforward	Service Provider	4	21	16	84	786

49. Describe the development team’s organizational experience in engaging with the target populations you intend to serve, including black, indigenous, and other people of color. Especially consider operations, design, development, and property management.

The development team understands the importance of pulling together a diverse team which includes ownership, non-profit partners, community organizations, and neighbors.

50. Describe ways in which the development team promotes and supports ongoing equity work in internal policy and procedures and within the community and the greater Madison area.

Northpointe Development plans to bring quality affordable housing into an area of social and economic opportunities. Stable housing paired with proximity to jobs, schools, amenities is vital to promoting social equality. Northpointe plans to co-develop the site with Selassie Development an emerging developer to help build their capacity and experience in housing development.

51. If any team member has acted as a development partner or has any ownership interest in any project currently underway or completed, please list the following information and provide a current status for the team member and/or any related entity, as applicable:
- List any foreclosure, default, or bankruptcy within the past ten years.
 - List any litigation completed, pending, or underway in relation to any financing or construction project within the past five years.
 - List any Chronic Nuisance Abatement or Nuisance Case notifications issued by Madison Police Department and/or Building Inspection in the past five years
 - List any unresolved Building Inspection citations resulting in a Municipal Court Complaint in the past five years
 - List any litigation in the past five years with the City of Madison, including but not limited to Federal, State, or Municipal Court proceedings
 - List any litigation in the past five years in the State of Wisconsin, including but not limited to Federal, State, or Municipal Court proceedings

N/A

INTEGRATED SUPPORTIVE HOUSING UNITS

52. Provide the number and percent of Integrated Supportive Housing Units proposed, the income category(ies) targeted for these units, and the target service population(s) proposed (e.g., individuals and/or families currently experiencing homelessness listed on the Community-wide Prioritized List, persons with disabilities, formerly incarcerated individuals, other, etc.).

The project will service Homeless, Vets, Vets experiencing homelessness, individuals with disabilities. 12 units will be set-aside specifically for homeless or those at risk of being homeless at 30% CMI. We will also work with the Dane County VA to house vets at all income levels. 12 units will also meet universal design and targeted to households with disabilities. 4 months prior to occupancy we will start meeting weekly with the property manager, Wayforward, Dane County Veterans, City of Madison, and Dane County to discuss referrals, applications and screening. Wayforward and DCVA will coordinate with the property manager on which units are still available and send referrals. Those referrals will get assistance from Wayforward and DCVA to work through the application screening process. This process has worked well for our other Dane County projects. On-going the property manager, Wayforward, and DCVA will stay in touch for when existing tenants move out and new referrals are needed.

53. Provide the number and percent of Veteran Units targeted in the proposed development at or below 60% AMI. How many of the veteran units will be prioritized for veterans experiencing homelessness coordinating with the HUD VASH program listed in Attachment C?

As a non-competitive tax credit application, WHEDA does not require a formal MOU with the VA. However, we plan to work with the VA to target minimum of 6 vets households at 50% cmi which typically have had HUD VASH. Also, it was stated by the VA that ACC is currently the leader in housing referrals made by the DCVA.

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

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

Please see the supportive services plan and MOU/ Letter from our partner supportive service agency. We've partnered with Wayforward to coordinate services for the target population as well as provide on-site intensive case management services if their organization has capacity. If they do not have capacity for intensive case mgmt for additional households at the time of the vacancy, property management and Wayforard will coordinate with another provider for case management. Currenty Wayforward believes they have capacity to provide case management to 2 households and will provide staff as needed for appropriate case management. a .5 PT case manager will be shared between phase I and II.

55. Please describe the proposed integrated supportive housing approach that will go beyond meeting WHEDA's supportive housing requirements outlined in the Appendix S Checklist of the WHEDA Qualified Allocation Plan targeting veterans and/or persons with disabilities. Please elaborate on the target populations the proposed development will prioritize serving. Describe the consultation and coordination between Developer, the Property Manager and the lead Supportive Service Coordination Agency that occurred prior to this application and planned to design the development in terms of matching unit mix (income and size) to the targeted population.

We will work with a service coordinator, Dane County VA (Heather Campbell), and providers for referrals and to assess the needs of the tenants at move-in and what the tenants will need to maintain stable housing. Case management will be provided by our partner support service provider Wayforward or other agencies like Joining Forces for Families. We will proactively work with management and our service coordinator with our waiting list and when a supportive unit becomes vacant to place a family in need vs waiting 30 days with the unit vacant and renting to any income eligible household. Wayforward will utilize wraparound a service coordination model where families residing at the property, including Veterans and persons with disabilities, will be given a single point of entry to accessing community and supportive services. An on-site coordinator will meet with individuals and families to complete an intake assessment and develop a strength-based, goal-oriented plan of care. The service coordinator will work with the tenant and their surrounding existing natural supports, to build a comprehensive team, to explore areas of need, and fill gaps in supports where identified.

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

Attach a letter from the Supportive Service Provider(s) **affirming** the services they intend to provide to residents of the supportive housing units, the cost of those services and how those services will be financially supported (i.e., through the development, fundraising, existing program dollars, etc.). Supportive Service Provider should also confirm that they've reviewed the projected rents, been given an opportunity to provide feedback and are comfortable with those rents being able to serve the target population.

Per the MOU the development would pay Wayforward \$6,000 annually above the line as well as find other areas within the community to leverage additional resources. We have also signed an MOU with Wayforward to utilize 1,000 sq feet of the commercial space in phase I as a community service facility. In that space there will be case management offices, food pantry, etc. The cost for this space will be \$1/ year as is needed for Wayforward to grow and meet the needs of their service area. We are also working towards securing a HOME ARP grant of \$285,000 for Wayforward that would go towards case management costs for the target population

PROPERTY MANAGEMENT: TENANT SELECTION & AFFIRMATIVE MARKETING

57. Confirm that Applicant has read and submitted with this application a Tenant Selection Plan consistent with the Standards found in RFP Attachments B-1 and will submit before closing an Affirmative Marketing Plan consistent with the Standards found in RFP Attachments B-2.

Yes, I confirm.

58. Describe the proposed property management entity or partner's experience including number of projects, number of units and location of projects managed. Be sure to address the property management entity's performance

experience with and approach to leasing up and coordinating with integrated support services as well as with racially, linguistically, and culturally inclusive property management and marketing practices.

4 months prior to occupancy we will start meeting weekly with the property manager, Wayforward, Dane County Veterans, City of Madison, and Dane County to discuss referrals, applications and screening. Wayforward and DCVA will coordinate with the property manager on which units are still available and send referrals. Those referrals will get assistance from Wayforward and DCVA to work through the application screening process. This process has worked well for our recent dane county projects. On-going the property manager, Wayforward, and DCVA will stay in touch for when existing tenants move out and new referrals are needed.

59. Describe the planned approach, relationship and coordination between the Property Manager and the lead Supportive Service Coordination Agency for lease up and ongoing services. Have these entities previously participated in an in-depth pre-lease up coordination process with these target population(s) in coordination with relevant community partners (e.g., CDA, DCHA, VASH, CE, etc.)? I.e., what is the level of integration of this proposed team with each other— low, medium, high? How will these entities work together to ensure a successful development well-integrated with the immediate neighborhood and community?

see above- we recently hired an asset manager which is responsible to oversee the coordination and communication of the partners involved in our projects.

60. Describe the affirmative marketing strategy and any other strategies to engage the target populations for this proposal. How will the Property Manager affirmatively market to populations that will be identified as least likely to apply? Detail specific partnerships that the development team, Property Manager, and/or other agencies in this proposal have had with community agencies and organizations that provide direct housing search and related assistance to households least likely to apply. Please reference successful past practices, relationships with agencies and/or marketing materials used. Specifically outline how this development's marketing will be consistent with the City of Madison's Affirmative Marketing Plan Standards (Attachment B-2 of the RFP), especially for Asian and Latinx populations which tend to be under-represented in AHF Completion Reports.

With a portfolio of more than 4000 units of Section 42, Section 8 and Section 515 housing with varying eligibility requirements and set asides, ACC Management Group, Inc (ACC) has significant experience with providing housing for those with special needs or those least likely to apply. ACC affirmatively markets apartments by working with local referral sources in each market.

ACC will affirmatively market to individuals by working closely with organizations such as:

- The Dane County Aging and Disability Resource Center and the approved Family Care Agencies in Dane County;
- Dane County Human Services and;
- Dane County Veterans Services Office

ACC will:

ACC will work with Latinx and Asian organizations listed below as well as our Service Coordinator the Middleton Outreach Ministry and Joining Forces for Families. ACC will:

- Provide marketing flyers about the apartments to various members of the referral groups, we will ensure that their clients have access to written information about this housing opportunity.
- Reach out and meet directly with staff of the various contracted and member agencies associated with these partners, we will ensure that they are aware of this housing opportunity for their clients and members.
- Stay in regular contact with the entities listed below as well as their respective networks of services providing agencies to receive referrals of households who may wish to live in the Apartments.

All referrals received through our affirmative marketing efforts will be followed up on to ensure they have the opportunity to apply for rental housing at these Apartments. When a housing unit becomes available those at the top of the waiting/ interest list for those units will be notified and directed to contact the property manager to formally apply for housing.

Management will reach to and work with the following local organizations and groups, amongst others, to market available units: Latino Academy of Workforce Development, Latino consortium for Action, Lasup- Latino Support Network of Dane County, Hmong Madison.com, Madison Area Chinese Community Organization, Central Hispano, Urban League, Joining Forces for Families, Freedom-Inc

61. Please address, in detail, experience in and/or plans to implement inclusive and culturally-sensitive property management and marketing practices. Detail specific partnerships that the development team, Property Manager,

and/or other agencies in this proposal have had with community agencies and organizations that provide direct housing search and related assistance to households least likely to apply, **especially including undocumented residents and/or residents without social security numbers**. Please reference successful past practices, relationships with organizations that you have partnered with in the past for marketing activities.

Management has experience working with many partners including Lutheran Social Services, Movin' Out, WayForward Resources, and many more, particularly to find housing options for those least likely to apply, which includes applicants without a Social Security number. If an applicant does not have a social security number, another form of government issued ID is accepted.

62. Describe your approach to successfully utilizing alternatives to eviction, both pre- and-post filing, such as payment plans, mediation, etc. to avoid evictions.

Eviction is the last option. If a resident becomes delinquent on rent, a legal notice is issued. Before, during, and after the timeframe of the legal notice, on-site management engages in discussion with the resident regarding the unpaid balance to encourage the resident to pay the balance or seek other resources, often times available rental assistance from local organizations. It is common to work with a resident and the agency over a period of a few months to obtain rental assistance for an unpaid balance and a few months of future rent. Management often files for eviction concurrently while engaging in conversation with the resident and working with them to obtain additional resources. This is necessary to provide fiscally responsible management of the property. Most often, the eviction process ends short of eviction and frequently concludes with a court ordered payment plan.

63. What percentage of maximum LIHTC rents are used for 50 & 60% units? Households with incomes over 30% CMI, but less than the income to rent ratio required for a 50% unit are frequently locked out of this critical housing resource. What will this proposed development do to serve this segment of the population (e.g., lower rent below 90% of the WHEDA 50% income limit, lower income to rent ratio requirements, provide 40% units to meet demand, etc.)

The 50% (no 60s) units will be rented at rent maximums given the significant discount to market. We will follow the PN loan agreement for rent increases and monitor so that prospective long-term tenants rents aren't rising rapidly after move-in. We have also committed to the city's TSP requirements.

64. Describe the proposed development's policy toward notification of non-renewals. What is the PM's policy regarding limiting rent increases for lease renewals? How will it be ensured that prospective long-term tenants be protected from significantly and rapidly rising contract rents increases allowed under the published rent limits, even under the rent limit increase requirements in this RFP and Loan Agreement.

Non-renewal of a lease is an option that is used with tenants that repeatedly violate the lease throughout their tenancy. It is most often used in situations where the tenant engages in verbal abuse of staff, physical altercations with others, damage to property, or non-compliance with program regulations. Proper notification of non-renewal is given at least 30 days in advance of lease termination. The rent increase at lease renewal is reviewed annually. Multiple factors are taken into consideration when setting renewal rates including, comparable rents, the published rent limits, anticipated property expenses, vacancy percentage, and more. Often times, the renewal rents for existing tenants are set at a rate lower than the published rent limit and lower than the listed rent for an identical vacant unit in the building.

65. Describe any staffing challenges or shortages that the Property Management (PM) company has experienced at the on-site level in the past few years? What will the PM do to address and/or cover on-site staffing challenges at the proposed development should they arise?

It is widely known that there are staffing challenges across most industries. Our management team has experienced staffing challenges as well. Management has developed a team of floating managers that have three primary responsibilities; 1) To cover vacant manager positions, 2) to assist in training new staff, and 3) to assist in leasing up new developments. This model has been highly successful.

66. What percent of staff turnover has the PM experienced at Madison-area properties in 2023? 38

67. Divide the number of resignations or terminations in calendar year 2023 by total number of budgeted positions. Explain turnover rate of 20% or more within the regional Property Management staff. Discuss any other noteworthy staff retention issues or policies in place to reduce staff turnover.

Management's turnover rate at the regional management level and above is less than 20%. We've developed a culture based on our values of Accountability, Empowerment, Flexibility, Teamwork, and Open Communication. This has proven to be successful.

PROPOSAL TIMELINE

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

Activity/Benchmark	Estimated Month/Year of Completion
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [<i>Target/Actual Month/Date</i>]	7/24
1 st Development Assistance Team Meeting (Due by 8/29/24) [<i>Target/Actual Month/Date</i>]	8/24
1 st Neighborhood Meeting (Due by 8/29/24) [<i>Target Month/Date</i>]	8/24
Submission of Land Use Application (Zoning Map Amendments Due by 10/7/24)	N/A
Submission of Land Use Application (Permissively Zoned Due by 11/4/24)	09/2024
Plan Commission Consideration (If Rezoning, 12/2/24 Meeting for 12/10/24 Common Council)	11/2024
Urban Design Commission Consideration, if applicable [<i>Target Month/Date</i>]	N/A
Application to WHEDA	11/2024
Complete Equity & Debt Financing	3/2025
Acquisition/Real Estate Closing	6/2025
Rehab or New Construction Bid Publishing	5/2025
New Construction/Rehab Start	6/2025
Begin Lease-Up/Marketing	2/2026
New Construction/Rehab Completion	6/2026
Certificates(s) of Occupancy Obtained	6/2026
Complete Lease-Up	10/2026
Request Final AHF Draw	6/2026

HOUSING INFORMATION & UNIT MIX

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

ADDRESS #1:		6702 Odana Road					Projected Monthly Unit Rents, Including Utilities				
% of County Median Income (CMI)	Total # of units	# of Studios	# of Bedrooms				\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
			# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs					
≤30%	12	0	9	3	0	0		708	850		
40%	0		0		0	0					
50%	24		17	7	0	0		1181	1417		
60%	0	0	0	0	0	0					
Affordable Sub-total	36	0	26	7	0	0					
80%	24	0	12	12	0			1446	1715		
Market*	0	0	0	0	0	0					
Total Units	60	0	38	19	0	0	Notes/Utility Allowance Assumptions:				

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

Total # of Homeless Supportive Housing Units	Total # of Veteran Supportive Housing Units	Total # of Homeless Veteran Supportive Housing Units	Total # of Disabled/Other Supportive Housing Units	Minimum # of Supportive Housing Units
		[]		

ADDRESS #2:							Projected Monthly Unit Rents, Including Utilities				
% of County Median Income (CMI)	Total # of units	# of Studios	# of Bedrooms				\$ Rent for Studios	\$ Rent for 1 BRs	\$ Rent for 2 BRs	\$ Rent for 3 BRs	\$ Rent for 4+ BRs
			# of 1 BRs	# of 2 BRs	# of 3 BRs	# of 4+ BRs					
≤30%	0	0	0	0	0	0					
40%	0	0	0	0	0	0					
50%	0	0	0	0	0	0					
60%	0	0	0	0	0	0					
Affordable Sub-total	0	0	0	0	0	0					
80%	0	0	0	0	0	0					
Market*	0	0	0	0	0	0					
Total Units	0	0	0	0	0	0	Notes/Utility Allowance Assumptions:				

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

NOTE: For proposals contemplating project-based vouchers (PBVs), please list vouchered units under the same CMI designation that you will be representing to WHEDA (e.g. if the LIHTC application to WHEDA presents 8 PBV units as 50% CMI or 60% CMI units, please include those on the “50%” or “60%” row in the above table(s)). The City of Madison will enforce this income designation in the AHF Loan Agreement, if this proposal is awarded funds. Include a comment in the Notes, e.g., Eight (8) 50% CMI units will have PBVs.

70. Utilities/amenities included in rent: Water/Sewer Electric Gas Free Internet In-Unit

Washer/Dryer Other: Trash EBike Membership if desired

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

Unit Size (Number of Bedrooms)	Total Monthly Utility Allowance (\$)
Efficiency	
1-Bedroom	<u>51</u>
2-Bedroom	<u>65</u>
3-Bedroom	

72. Describe this development’s proposed approach to designing the project to maximize accessibility and visitability, including elevator accessible units meeting 100% visitable requirement. Will the proposed project meet the minimum requirements described in the RFP - at least half of the total units must be Type A units or convertible to Type A units as needed. Will the proposed project exceed WHEDA’s minimum accessibility design standards? For rehab, describe the accessibility modifications that will be incorporated into the existing development.

The project will be 100% visitable with 5% of the units be ADA and 20% of the units having universal design requirements. As a non-competitive tax credit application, WHEDA does not require universal design requirements.

73. Describe this development’s approach and commitment to the principles of Universal Design. Will the proposed project meet the minimum requirements described in the RFP. Will the proposed project go above and beyond WHEDA’s requirements in any way? Please explain.

Our developments incorporate a significant amount of WHEDA's universal design requirements in all units.

ENERGY EFFICIENCY, RENEWABLE ENERGY, DECARBONIZATION & SUSTAINABLE DESIGN

74. Describe your organization’s experience developing projects that incorporate extraordinary sustainability, energy efficiency, decarbonization/electrification, and/or green building design? Please list any industry standards, third-party certifications or awards achieved on projects developed in the past five years, such as LEED®, WELL, ENERGY STAR Multifamily New Construction Certification, Passive House, etc.

We are committed to energy efficiency and sustainable design. All of our Dane County Developments include PV Solar and we have 4 projects either complete or under construction that will be Energy Star- New Construction certified.

75. Describe the proposed development’s energy efficiency approach, design and equipment choices. For a rehab project, please refer to Focus on Energy’s [Multifamily Program](#).

Our approach is to always push for energy efficiency design and equipment as the budget allows. This project will included PV and EV chargers, design to be well below baseline EUJ

76. Check all applicable third-party certifications of Energy Efficiency & Sustainability that will be sought.

Third-Party Certification	YES
Focus on Energy’s Energy Design Assistance program (Initial Application submittal confirmation page is attached)	<input checked="" type="checkbox"/>

Wisconsin Green Built- GOLD Standard	<input checked="" type="checkbox"/>
EPA AirPLUS	<input checked="" type="checkbox"/>
LEED®	<input type="checkbox"/>
WELL	<input type="checkbox"/>
ENERGY STAR Multifamily New Construction	<input checked="" type="checkbox"/>
Passive House	<input type="checkbox"/>
Other:	<input type="checkbox"/>
Other:	<input type="checkbox"/>

77. Describe how the design of the proposed development will contribute to the City's [goal](#) of reaching 100% renewable energy and net-zero carbon emissions community-wide by 2050. Please describe below any other renewable energy systems to be included in the development, such as solar thermal, solar hot water, geothermal, etc.
 What size of solar array is anticipated (in Kw)? **70**
 What percentage of on-site electricity use is the development aiming to provide via the solar array? **90%**

We are working with Full Spectrum and plan to install a 70kw solar system on the roof that will eliminate up to 90% of the projects common area energy usage. We've confirmed that the project is serviced by MG&E so the size of the system is feasible at this site. We will also be working with Focus on Energy and will be installing highly efficient furnaces and other materials.

78. Please indicate sustainable design features and equipment included choices in the proposed development that will help to reduce fossil fuel consumption, achieve decarbonization, and improve air quality:

Sustainability Design Features & Equipment	YES	Comments
a. Air-source or ground source heat pumps	<input type="checkbox"/>	
b. Electric or heat-pump water heaters	<input type="checkbox"/>	
c. Electric stoves	<input checked="" type="checkbox"/>	
d. EV charging infrastructure or EV ready design (<i>exceeding City ordinance requirements</i>)	<input checked="" type="checkbox"/>	
e. Battery storage	<input type="checkbox"/>	
f. Other:	<input checked="" type="checkbox"/>	PV solar
g. Other:	<input type="checkbox"/>	

79. Please *briefly* describe the Sustainable Building Design Elements and Strategies that will be incorporated into the proposed project as referenced in the [AIA Framework for Design Excellence](#), especially the following:

a. Design for Equitable Communities

The project is an infill site on a major thoroughfare and will be unique as it will offer a variety of housing options. The site is very walkability to amenities, jobs, public transportation, bike paths. All units will have balconies. The parking will be mostly hidden underground where we will also have bike parking. Additional bike parking will be provided outside of the building. Finally, heat, internet and underground parking will be included with the rent as an added benefit to the tenants

b. Design for Energy – Optimized energy use. What is the U value of windows?

The project will have energy efficient window systems, meet or exceed energy code, score 250 or more points on Wisconsin Green Built Standards, and HVAC systems highly efficient. u-value goal .27, energy star appliances

c. Design for Water – Describe proposed strategies to protect and conserve water (i.e. water efficiency), reduce reliance on municipal water sources, incorporate systems to recapture and/or reuse water on-site.

we will install low flow faucets, toilets, energy efficient appliances, and water heaters with re-circulation water lines.

d. Design for Resources – Optimize building space and material use

Locally sourced masonry- materials utilizing recycled materials where possible.

e. Design for Well-being – Consider physical, mental, and emotional well-being, plus trauma-informed design.

On-site community room, exercise room, space to meet with support service partners, etc

f. Design for Ecosystems – Especially indoor environmental quality (IEQ)

The building will have generous windows, air purification filters, and operable sashes on windows for fresh air.

g. Design for Change – Optimize operational and maintenance practices

LVP flooring throughout the unit, individual furnaces and fresh air circulation to the exterior of the building.

h. Design for Integration, Economy, Change and/or Discovery – Any additional AIA Framework comments

the project will include additional conduit for additional EV chargers to be installed

REAL ESTATE PROJECT DATA SUMMARY

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

	# of Units Prior to Purchase	# of Units Post-Project	# Units Occupied at Time of Purchase	# Biz or Residential Tenants to be Displaced	# of Units Accessible Current?	Number of Units Post-Project Accessible?	Appraised Value Current (Or Estimated)	Appraised Value After Project Completion (Or Estimated)	Purchase Price
Address:	6702 Odana Rd; Madison, WI 53719								
	0	60	0	0	0	60	1,275,000	6,500,000	1,275,000
Address:	Enter Address 2								
Address:	Enter Address 3								

81. Describe the historical uses of the site. Identify if a Phase I Environmental Site Assessment has been completed and briefly summarize any issues identified. Identify any environmental remediation activities planned, completed, or underway, and/or any existing conditions of environmental significance located on the proposed site.

The site is currently occupied by Great Midwest Bank- owner occupied that will vacate. A phase 1 for 6706 was completed and did not show any issues.

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

The site is currently occupied by Great Midwest Bank- owner occupied that will vacate and the building will be demolished.

83. Will any business, including churches and non-profit organizations, or residential tenants (owner or rental) will be displaced temporarily or permanently? If so, please describe the relocation requirements, relocation plan and relocation assistance that you will implement or have started to implement.

no- owner occupied sole occupant

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

N/A

REFERENCES

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

Name	Relationship	Email Address	Phone
Shreedhar Ranabhat	WHEDA Commerical Lending Director	shreedhar.ranabhat@wheda.com	608-266-2781
Will Deppeisses	Nicolet Bank- VP Commerical Banking	wdeppeisses@nicoletbank.com	920-882-2857
Jamie Auli0	City of Verona Administrato	Jamie.Aulik@ci.verona.wi.us	608-848-9942

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

- 1. A completed Application Budget Workbook, showing the City’s proposed financial contribution and all other proposed financing.
- 2. Description of the Development Team’s Experience and Capacity per Section 2.5, Item 2 of the RFP. This may be attached or including in the application. Please do NOT duplicate information attached and included in line.
- 3. Letter(s) from Supportive Service Provider(s) affirming in detail what services are necessary to be adequate for the number of supportive housing units and target population as well as what level of services they intend to provide (such as assessment and referral, on-site intensive case management, etc.), % FTE, hours on site, etc.
- 4.a. A detailed map of the site.
- 4.b. A map using the AHF Affordable Housing Targeted Area Map, indicating the site in the context of the City.
- 4.c. A preliminary site plan and one to two renderings, if available.
- 5. A Capital Needs Assessment report of the subject property, if the proposal is for a rehabilitation project and if the report is available at the time of application.
- 6. A confirmation page demonstrating that an Initial Application for Energy Design Assistance was submitted to Focus on Energy. If the Bundle Report is available, please attach it now as well.
- 7a. Tenant Selection Plan consistent with the City’s Standards outlined in Attachment B-1.

If the following items are not available at the time of initial application, submittal will be required at the following future date:

Application Item	Due Date
Preliminary Site Plan	A week prior to Development Assistance Team (DAT)
Capital Needs Assessment	Supplemental Application
Market Study/Analysis – may be informal <i>(Required for new construction proposals seeking HOME funds)</i>	Supplemental Application

APPLICANT: Northpointe Development- Northpointe Senior

3. PROJECT PROFORMA

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

Table with 30 columns (Year 1-30) and rows for Gross Income, Less Vacancy/Bad Debt, Income from Non-Residential User, Total Revenue, Expenses (Office, Real Estate, Advertising, Payroll, Insurance, etc.), Total Operating Expenses, Net Operating Income, Debt Service (First Mortgage, Second Mortgage), Total Debt Service, Total Annual Cash Expenses, Debt Service Reserve, Deferred Developer Fee, Cash Flow, and AHF City Interest Loan.

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

Summary table for DCR Hard Debt and DCR Total Debt, showing values for Year 1 and Year 2.

Assumptions table for Vacancy Rate, Annual Increase Income, Annual Increase Expenses, and Other.

APPLICANT: [Redacted]

3. PROJECT PROFORMA (cont.)

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

Table with 30 columns (Year 17-30) and rows for Gross Income, Less Vacancy/Bad Debt, Income from Non-Residential User, Total Revenue, Expenses (Office, Real Estate, Advertising, Payroll, Insurance, etc.), Total Operating Expenses, Net Operating Income, Debt Service (First Mortgage, Second Mortgage), Total Debt Service, Total Annual Cash Expenses, Debt Service Reserve, Deferred Developer Fee, Cash Flow, and AHF City Interest Loan.

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

Summary table for DCR Hard Debt and DCR Total Debt, showing values for Year 17 and Year 18.

Assumptions table for Vacancy Rate, Annual Increase Income, Annual Increase Expenses, and Other.

APPLICANT & PROJECT NAME:

Northpointe Development- Merchant Place Senior

1. CAPITAL BUDGET

Enter ALL proposed project funding sources.

FUNDING SOURCES

Source	Amount	Non-Amortizing (Y/N)	Rate (%)	Term (Years)	Amort. Period (Years)	Annual Debt Service
Permanent Loan-Lender Name:						
WHEDA	\$ 5,655,000	Y	6.00%	35	35	\$500,855
Subordinate Loan 1-Lender Name:						
Subordinate Loan 2-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
City Request (AHF, HOME, TIF)						
AHF	\$ 2,500,000	n	2.75%	30	30	cash flow
Subordinate TIF Loan-Lender Name:						
AHP Loan (List FHLB):						
FHLBC						
Dane County AHDF:						
AHDF	\$ 2,400,000	n	2.00%	40	N/A	cash flow
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 8,019,326					
Historic Tax Credit Equity (Fed and/or State)						
Deferred Developer Fees	\$ 1,301,728					
Owner Investment	\$ 100					
Other-Specify:						
Total Sources	\$ 19,876,154					

Do you plan on submitting an application for TIF?

No

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan 1-Lender Name:			
WHEDA LT Bonds	\$ 5,655,000	6.00%	22
Construction Loan 2-Lender Name:			
WHEDA ST Bonds	\$ 4,000,000	4.50%	22
Construction Loan 3-Lender Name:			
City of Madison	\$ 2,500,000	2.75%	22
Construction Loan 4-Lender Name:			
County AHDF	\$ 2,400,000	2.00%	22
Bridge Loan-Lender Name:			
Housing Tax Credit Equity:			

Cinnaire	\$	4,000,000	0.00%	22
Historic Tax Credit Equity:				
Other-Specify:				
Total	\$	9,655,000		

Estimated pricing on sale of Federal Tax Credits: \$ 0.88

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

Remarks Concerning Project Funding Sources:

APPLICANT:

Northpointe Development - Merchant Place Senior

2. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$1,275,000
Existing Buildings/Improvements	\$0
Other (List)	
	\$0

Construction:	
Construction/Rehab Costs	\$12,060,000
E - Equipment & Furnishings	\$0
F - Special Construction & Demolition	\$0
Accessory Buildings	\$0
Personal Property/FF&E	\$100,000
Site Work Costs (on-site & off-site)	\$0
Landscaping	\$0

<---

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

Total Cost:

Solar- 100k
Energy star insulation- 250k

\$500,000

Contractor Fees:	
General Requirements	\$608,000
Construction Overhead	\$255,360
Construction Profit	\$651,168
Construction Supervision	\$0

Contingency Funds:	
Construction Contingency	\$683,726
Other Contingency	\$0

Construction Period Expenses/Soft Costs:	
Construction Loan Origination Fee	\$100,000
Construction Loan Credit Enhancement/LOC	\$50,000
Cost of Bond Issuance	\$0
Bridge Loan Fees and Expenses	\$0
Construction Loan Interest	\$525,000
Construction Loan Origination Fee	\$0
Construction Period Real Estate Taxes	\$60,000
Title and Recording	\$25,000
Builder's Risk/Property Insurance	\$100,000
Temporary Relocation Assistance	\$0
Permanent Relocation Assistance	\$0
Other Interim/Construction Costs (list)	
	\$0

Permanent Financing Expenses:	
Permanent Loan Origination Fee	\$0
Credit Enhancement	\$0
Other Permanent Loan Fees	\$0
Legal Fees - Real Estate	\$75,000

Architectural & Engineering:	
Architect - Design	\$165,000

Architect - Supervision	\$30,000
Engineering	\$50,000
Survey	\$6,400
Other Architect/Engineering (list)	
energy consultant	\$30,000
Syndication Fees & Expenses:	
Organizational Fees	\$12,000
Other Syndication Costs (list)	
	\$0
Capitalized Reserves:	
Operating Reserve	\$380,000
Replacement Reserve	\$0
Lease-Up Reserve	\$50,000
Debt Service Reserve	\$0
Capital Needs Reserve	\$0
Other Reserves	\$0
Escrows	\$0
Other Capitalized Reserves (list)	
	\$0
Reports, Studies & Related Work:	
Appraisal	\$10,000
Market Study	\$7,000
Environmental Reports	\$10,000
Capital Needs Assessment Report	\$0
Other (list)	
	\$0
Other Soft Costs:	
Tax Credit Fees - Application	\$2,500
Tax Credit Fees - Compliance	\$95,000
Tax Credit Fees - Allocation	\$0
Permits & impact fees - water, sewer, etc.	\$0
Cost Certification/Accounting fees	\$15,000
Lease-Up Period Marketing	\$45,000
Title Insurance and Recording	\$0
Capital Needs Assessment (rehab only)	\$0
Legal	\$0
Other (list)	
	\$0
Developer Earned Fees & Expenses:	
Developer's Fee	\$2,400,000
Developer Overhead	\$0
Consultant Fees	\$0
Other fees (list)	
	\$0
Total Costs:	\$19,876,154

2024 Affordable Housing Fund-Tax Credit RFP

Supplemental Application Questions

Northpointe Development Merchant Place Senior Apts

Response Submission Due Date: September 5, 2024 NOON

Instructions to Applicants:

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

Message to 4% Non-Competitive Applicants:

Although this RFP allows applications for 4% non-competitive tax credit projects, CDD's focus remains firmly on producing 30% AMI units, Supportive Housing Units for individuals, families and veterans experiencing homelessness, Sustainability, Design, Universal Design, etc. Proposals for non-competitive 4% LITHC's will not likely be competitive in the City's AHF-TC RFP without addressing meeting those requirements and/or preferences. Please re-submit answers to the relevant questions accordingly.

Questions:

A. Energy Efficiency/Sustainability

- 1. The AHF-TC RFP requires awardees to continue working with Focus on Energy's New Construction Energy Design Assistance throughout the building design process. Bundle commitments will be incorporated into the term sheet.**

- a. **Please attach the Preliminary Bundle Requirements Document (BRD).**

If the Report is not yet available, please provide an update on the status at the Staff Team (9/9-10) and CDBG Committee Presentation (9/12); and send ASAP no later than NOON on October 15, 2024. **We have connected with FOE for timing on next steps as we utilized the Express EDA. They acknowledged the City's deadline and will work to get the process expedited.**

- b. **What percentage of projected Energy Use Intensity (EUI) savings calculated over the baseline energy code is anticipated? (Note: Min. 20% required)**

___%TBD but Typically well above 20%

- c. **What is the highest feasible Bundle Level to which this project anticipates committing?**

___ TBD- typically we choose bundle 3

- d. **If the Bundle election is less than the highest, which options and/or components were not chosen and why? TBD**

B. Property Management (PM)

1. Please answer the following regarding on-site PM staffing:

- i. **What percent FTE and number of hours are budgeted for the PM to be on-site? E.g., .50 FTE, 9a-1p – M-F?**

Merchant Place Senior is a 60-unit building that will be adjacent to Merchant Place Apartments, a 124-unit building. They will be staffed together with a full-time manager, full-time assistant manager, and a leasing assistant that will be either part-time or full-time depending on need. The property will be open during traditional business hours Monday – Friday and by appointment on Saturday.

- ii. **How many hours per week of additional regional &/or floating support is anticipated to assist &/or cover for on-site PM, vacancies, sick days, etc.? Please elaborate briefly on backup coverage.**

Hours/week: ACC Management has a staff of Area Managers (floating managers) that assist properties during times of high traffic, such as the lease up. They also work at a property if there is a staff opening, extended sick leave, or vacation. Area Manager staff will be assigned to the property as needed.

- iii. **What percent FTE and number of hours are budgeted for the Maintenance staff to be on-site? Merchant Place Senior is a 60-unit building that will be adjacent to Merchant Place Apartments, a 124-unit building. They will be staffed together with two full-time maintenance technicians during normal business hours Monday through Friday and on-call as needed.**

2. It is a goal of the City to ensure that residents who require ADA units are able to obtain appropriately accessible units and/or accommodations. Please answer the following:

- i. **In the Dane County market, how many fully ADA accessible units does the PM manage?**

ACC has about 1000 units in Dane County in various stages of development from established and operating for 10+ years to currently under construction, all in the Section 42 program. The newer properties generally have about 4% of the units as fully accessible and an additional 15% as “WHEDA B” units that have some accessible features.

- ii. **What percent of those units are currently leased by residents who require the relevant accessibility accommodations?**

On average, about half of the fully accessible units are leased to those that we visually assume require the accommodations.

- iii. **Briefly describe your property management strategies to ensure these units are available for residents that require accessibility features.**

ACC has a long history of managing affordable housing, including many properties in the Section 8 program where there are requirements to market to those with disabilities when an accessible unit becomes available. This is a best practice and is also done for Section 42 properties. Additionally, we keep an internal interest list for any current occupants of the property that may be interested in an accessible unit so they can be offered a unit transfer when an accessible unit becomes available.

iv. Briefly describe outreach, marketing, and direct referral partnerships you have with organizations to ensure these units are appropriately filled.

New Section 42 developments in Dane County often have partnerships with organizations that refer applicants to the property for various reasons, including the need for accessible housing. Examples of relationships include Way Forward, Lutheran Social Services, Movin' Out, and Dane County. During lease up, we are in contact with these groups weekly. After property stabilization, we are in contact with these organizations monthly or as needed when a particular unit becomes available.

C. Land Use and Community Engagement

- 1. Please describe the feedback that you received from the Development Assistance Team (DAT) presentation on 8/1/24.** Supportive, would like our design team to attempt redesigning the parking lot and a slight shift of the building if possible and acceptable to Park Towne Management. Also, more units and commercial space if it were to be feasible would be supported at this site.
- 2. Provide an overview of the feedback and comments that received from the neighborhood meeting on 8/21/24.** Supportive comments received by the Alder, otherwise no comments were made by the public in attendance.

D. Design

- 1. This 2024 AHF-TC RFP increased baseline requirements for Universal Design from WHEDA's 2023-2024 Universal Design requirements, from 20% to 50%. Where WHEDA requires less than 20% percent of units to meet a requirement, the City's requirement is double the percent of the WHEDA requirement, e.g., 5% WHEDA requirement would be increased to 10%. Even though WHEDA's non-competitive tax credit applications do not require universal design and increased accessibility (at least half of the units as convertible to Type A), senior development proposals have a greater obligation to meet the needs of the target population. Please clarify and/or resubmit answers to Q 72 and 73.**
 - 72.** The project will be 100% visitable with 50% of the units being ADA or Convertible to ADA (WHEDA B units). However, all units are designed with clearances to be converted to ADA if necessary.
 - 73.** As stated above, universal design features are incorporated into all units and most of the WHEDA universal design requirements are incorporated into all units. This goes above and beyond WHEDA's and City's requirements.

E. Supportive Housing Units/Supportive Housing Partnerships

- 1. 12 units are set aside for referral from Dane COC Coordinated Entry List, however only 2 units will have intensive supportive service capacity provided by WayForward. Describe the service plan to support tenants experiencing homelessness should additional units need or seek more intensive support service coordination.** We are proposing a new and enhanced model with our Supportive Service Partner Wayforward than what we have been doing on other sites around the Dane County Market. This model will allow Wayforward staff to be on-site (20 hours) weekly to build better relationships with the tenants and their support systems in place. Tenants can choose not to utilize the services available, or they may have other systems already in place. Having a dedicated on-site partner will allow us to evaluate this model and make changes if necessary. WayForward collaborates closely with partners throughout the community to provide appropriate referral services and warm handoffs whenever possible. Some of the organizations and entities that we collaborate with include both the MCPASD and MMSD, and JFF. Other provider partnerships include Lutheran Social Services, Jewish Social Services, Elver Park Neighborhood Center, Lussier Community Education Center, Tenant Resource Center and Legal Action of Wisconsin, and providers within the Coordinated Entry system (Porchlight, Catalyst For Change, Briarpatch) WayForward housing case managers also collaborate closely with coworkers in our food security program to increase access to food and clothing programs to assist households in “stretching” their income when needed. FoodShare outreach services are provided, as well as unlimited access to the Food Pantry. These participants will also have access to onsite emergency food. All of this collaboration is necessary to create a network of support services for clients in an emergency but also to maintain long term stability.

2. Please re-submit the box on the Unit Mix page detailing SHU’s.

Total # of Homeless Supportive Housing Units	Total # of Veteran Supportive Housing Units	Total # of Homeless Veteran Supportive Housing Units	Total # of Disabled/Other Supportive Housing Units	Minimum # of Supportive Housing Units
4	3	[3]	2	12

These are targets based as defined by the RFP with first preference going to CE and an additional 6 units at 50% cmi targeting vets through our partnership with the VA.

F. Financing

- 1. Although it’s understood that the goal of pursuing a non-competitive 4% application is to gain efficiencies and break ground at the same time as the adjacent Merchant Apartments, if this proposal does not obtain an adequate award from the City in AHF during this RFP cycle, would a competitive 4%+4% application be considered?** Possibly, the census tract scoring doesn’t seem overly competitive at this moment, but WHEDA has yet to release the full MFA. If the project were to receive county support, we would have to re-apply for those funds if pursuing a 4+4. Once the full MFA is released by WHEDA we will be able to better comment on the question.