

## CDD Financing Application for Affordable Rental Housing Development: Non-Tax Credit

This application form should be used for projects seeking funding from City of Madison Request for Proposals #2024-13033; Affordable Rental Housing Development: Non-Tax Credit. Applications must be submitted electronically to the City of Madison Community Development Division by **noon on May 31, 2024**. Please format for logical page breaks. Email to: [cddapplications@cityofmadison.com](mailto:cddapplications@cityofmadison.com)

### APPLICANT INFORMATION

Proposal Title:	Safe - Stable - Supportive (S3) Housing		
Site Address (if known):	1802-1804 Roth St (tentative)		
Amount of Funds Requested:	\$3,056,197	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Name of Applicant:	Housing Initiatives, Inc.		
Mailing Address:	1110 Ruskin St., Madison, WI 53704		
Telephone:	608-620-1751		
Lead Project Contact:	Brad Hinkfuss	Email Address:	bhinkfuss@housinginitiatives.org
Financial Contact:		Email Address:	
Website:	www.housinginitiatives.org		
Legal Status:	<input type="checkbox"/> For-profit	<input checked="" type="checkbox"/> Non-profit	<input type="checkbox"/> Non-profit (CHDO)
Federal EIN:	39-1781842	SAM/UEI #:	MRLMUAJQZKS7
Registered on SAM:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	* If seeking federal funds	
Community Housing Development Organization:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> CHDO Application Attached	
HOME-ARP Set-Aside:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		

If applying to this RFP under the HOME-ARP Set-aside, please check the box for "Yes" above. **For questions in this application that do not apply, please write "Not Applicable."**

### 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.** Please consult the City Clerk for more information. Failure to comply with the lobbying ordinance may result in fines of \$1,000 to \$5,000. You may register at <https://www.cityofmadison.com/clerk/lobbyists/lobbyist-registration>.

### CITY OF MADISON CONTRACTS

If funded, applicant agrees to comply with all applicable local, state and federal provisions. A sample contract that includes standard provisions may be obtained 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: Bradley A Hinkfuss Date: 5/20/2024

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 **BAH** 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 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

2. Please describe the anticipated demand for this specific affordable rental housing development in the City of Madison. Please be specific as to which populations will be targeted, if any.

This housing will directly address the need for permanent supportive housing as clearly and consistently exhibited on the Coordinated Entry CE) priority lists. The target population will be those who are both chronically homeless and have a serious mental health disability. As an example of the demand for this type of housing, in February 2024 the CE system had 95 eligible candidates who met both criteria. In reality, this sample number is a dramatic undercount of the community-wide population since the CE system is set to auto exit clients who do not use services for 180 or more days. Clients often languish on the CE list for months to years because there is an insufficient number of units, and existing units turn over very infrequently. In short, the target population is considered the most challenging population to serve because they present with so many issues. Framed another way, the target clients are the most vulnerable people in our community because they have experienced so much trauma and face so many barriers to housing.

For all the housing developed in Madison, almost no one develops permanent supportive housing to serve this target clientele. The clients face the most barriers and traditional property management does not have the tools or skills to meet the needs. This housing is best - and often only - achieved through mission-driven organizations that integrate the skills, knowledge, intention, and compassion to do make it work.

### PROPOSAL OVERVIEW

3. 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).*

This project aims to add new permanent supportive housing (PSH) units to the community in a manner that is sustainable, manageable, and capable of being duplicated. Housing Initiatives has a 30-year history of successfully providing PSH and it is that knowledge and experience that will inform this project. The project will be purpose built with the needs of the target population in mind. Primarily, that means that the project will be built at a manageable scale (11-16 units); built for singles with efficiencies & one-bedrooms; have an integrated community service office staffed on-site; drive down operating costs through energy efficiency and other systemic features; integrate design features that curtail potential problem behavior; and offers a supportive and affordable permanent housing option regardless of individual income.

In the context of the immediate and larger community, this project will house the very people who are otherwise homeless on the street, in the shelters, and without any other housing option. This general outcome has many specific positive outcomes for both the clients themselves and the larger community. Clients experience improved health, increased income, stabilized mental health, more positive social relationships, and opportunities to positively engage with the larger community. On a community level, there will be reduced demand for emergency health services, less demand for homeless services, and fewer people homeless on the streets and in public places.

**SECTION A – ALL APPLICANTS MUST COMPLETE**

4. Type of Construction:  New Construction  Acquisition/Rehab  
 Type of Project:  Multi-family  Senior (55+ or 62+ yr. old): \_\_\_\_\_  
 Rental Cooperative

Total number of units in proposed development: **16**

Total number affordable of units (≤60% CMI): **16**

Total % affordable of units (≤60% CMI): 100

Total amount of CDD funds requested per affordable unit: **\$277,836 per HOME unit/ \$191,012 per total units**

Number of units supported by Section 8 project-based vouchers, if applicable: 0/TBD PBV CMI level: ≤50%

5. Please indicate acceptance of the standard loan terms for this proposal as described in Section 1.8 of the RFP.  
 Yes, I confirm.
6. Applicants requesting alternative loan terms and/or wishing to provide additional information regarding the financing structure or options, please indicate below.

In reference to subsidy support of units, Housing Initiatives has successfully administered a substantial Rental Assistance Grant that is annually renewable through the CoC funding process. This allows the agency to support many clients' rent in the absence of a voucher or other subsidy. As covered in the Tenant Selection Plan, the agency anticipates supporting many of the clients in this project with Rental Assistance funds.

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

**DEVELOPMENT TEAM OVERVIEW**

8. 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:
- Developer's housing development experience, including number, type and location of proposed and completed projects, affordability profile, etc. Years the organization has been in existence.
  - Leadership/key development team staff qualifications (briefly).
  - Financial capacity of the organization to secure financing and complete the proposed project.
  - For non-profit organizations, please describe the organization's Mission Statement and explain how the proposed development supports the Mission Statement.

This development team has considerable experiecnce in affordable housing development. Key to this is Brad Hinkfuss, the Executive Director of Housing Initiatives. Brad managed property development at Porchlight, Inc. for over 15 years, including substantial work in the areas of grant writing, homeless shelter management, maintenance supervision, and new property conceptualization & project management. Porchlight has existed since 2000.

The Porchlight portfolio consisted of over 30 properties while Brad was invovled there. He oversaw the substantial rehab and improvement of many of the exiting properties, including the comprehensive remodeling, expansion, and creation of the Veterans Transitional Housng Project at 1102 Spring St (24 units). What is more, he directly managed new affordable housing development of two new properties in Madison: Sixteen (16) units at 2718 Pheasant Ridge Trail, and 48 units split between two buildings at 4002-4012 Nakoosa Trail. The latter project also included an onsite, 24/7 supportive staff office and daytime drop-in facility for the homeless with serious mental illness. All projects at Porchlight and Housing initiatives were specifically targeted and restricted to clients @ less than 50% CMI, most also with a tenant selection plan that targeted the literally homeless.

Housing Initiatives has a portfolio of 151 units spread among 33 scattered site properties, with over 200 clients. All of these units are reserved for formerly homeless clients who present with serious mental health conditions. In the five years that Brad has led the agency, staffing has stabilized, services have expanded, and the agency has achieved positive cash flow sufficient to support additional growth.

Housing Initiatives has partnered with Hope Community Capital (HCC) as its Development Consultant to assist with some elements of the financing structure and the development process, as needed. Their assistance will support Housing Initiatives' capacity, both from a staffing and financial perspective, to take on this development while simultaneously running and expanding the existing operation. The collective experience of HCC brings a wealth of additional housing and development finance expertise to this project. Carrie Sanders, Founder & CEO, will be joined by Dave Porterfield, Community Development Consultant at HCC, to provide consulting services for the proposed project. The HCC team has collectively worked as a development and funding consultant on more than three dozen multi-family developments across the nation, most of which are income-restricted, with units affordable to households earning below 50% AMI. Dave Porterfield brings more than 30 years of direct experience in developing affordable housing, with a specialization in permanent supportive housing for persons with disabilities through his recent tenure as Senior Advisor at Movin' Out, Inc.

The mission of Housing Initiatives speaks directly to the prerogative of this funding; Housing Initiatives, Inc exists to provide permanent supportive housing for persons in Dane County who have a severe and persistent mental illness and are experiencing homelessness because of the illness. The project will support that mission by making 100% of the new units available and restricted to those who are both homeless and severely mentally ill.

9. For non-profit applicants interested in federal HOME funds, please describe the development team's experience using federal HOME or CDBG funds in detail, including a list of past projects the team has developed using such funds.

Housing Initiatives has successfully used HOME and CDBG funds on many projects in the organization's 33-property portfolio. Some of these loans go back as far as 1998, and others are as recent as 2018. Most of these funds were accessed as pieces of larger financial pictures as they related to the acquisition and rehabilitation of existing housing stock. This list is too extensive to be included here but a sample includes properties at 2500-02 Calyso Rd, 2505 Brentwood Pkwy, 310 E Mifflin St, 34 Powers Ave, 3734 W Karstens Ave, and 5028 Camden Rd. A full list can be made available on request.

Most significantly, in the organization's 30-year history all of these CDBG- and HOME-funded projects have been successfully managed at the fiscal, compliance, and inspection levels.

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

Contact Person	Company	Role in Development	E-mail	Phone
Brad Hinkfuss	Housing Initiatives	Principal, Ex Dir.	bhinkfuss@housinginitiatives.org	608.620.1751
David Ferch	Ferch Architecture	Architect	david@fercharchitecture.com	608.238.6900
Carrie Sanders	Hope Community Capita LLCI	Development and Funding Advisory	carrie@hopecommunitycapital.com	816.807.9295
Tyler Krupp	Threshold Development	GC consultant	tnkrupp@gmail.com	
Juscha Robinson	Pines Bach LLP	Legal Consultant	jrobinson@pinesbach.com	608.807.0752
Dave Porterfield	Hope Community Capital LLC	Development Consultant	Dave@hopecommunitycapital.com	

11. Who will be responsible for monitoring compliance with federal regulations and requirements during development and construction phases of the project? Describe their experience and list any past projects they have completed.

Monitoring and compliance will be primarily performed by Brad Hinkfuss, with support as needed from other agency staff in the areas of property management and services. Mr. Hinkfuss has considerable experience in managing new construction and renovation projects at scales larger and smaller than the project at hand (see previous listing for examples). Additionally, if needed, there is an option for staff from Hope Community Capital to assist with various compliance and monitoring functions if the need becomes apparent.

12. Are other major sources of soft funding being sought for the proposed development (e.g., TIF, 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.

Additional funding is currently being sought for the proposed development to supplement the requested HOME-ARP set-aside funds. The current pro forma identifies a construction to permanent first mortgage from Forward Community Investment, a Madison based CDFI lender whom we have discussed the project with. However, we anticipate reaching out to other potential sources such as those listed above, with a focus on FHLBC – AHP funding next year. Hope Community Capital has extensive experience in securing and closing on a wide variety of sources that would be appropriate for this project.

13. Is your development team willing to offer a development partnership role, employment, or other role to a graduate or student of the Associates in Commercial Real Estate (ACRE) program on this project?

Yes, we are open to exploring this possibility of a development assistant role in this project to a student in the ACRE program. It is unclear at this point just what that role would be since this is a project of modest scope and complexity, but we would welcome the involvement of someone genuinely interested in the development process of permanent supportive housing.

14. 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 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 contracts that meets or exceeds the City's goals.

The development team has ample experience in contracting with M/WBE businesses on various projects in the past. The best means of ensuring that such businesses have opportunities to bid and participate in the project is to intentionally contact them to advertise the project and solicit bids. The City's list of local M/WBE businesses can be very helpful in that regard, as well as direct past experience with eligible businesses.

15. Beyond standard construction bidding practices, 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 meet or exceed the City's contract labor utilization goal of 13% for persons of color working on the job site.

As with the answer to the previous question, the best way to ensure that women and people of color represent a significant portion of the workforce is to actively and intentionally seek out businesses that are owned by, and that employ those populations.

16. 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
		#	%	#	%	#
Housing Initiatives, Inc.	Developer	3	30	5	50	10
Hope Community Capital	Co-Developer	0	0	3	50	6
TBD	General Contractor					
Housing Initiatives, Inc.	Property Manager					
Ferch Architecture	Architect	0	0	0	0	1
Housing Initiatives	Service Provider					

17. 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.

Housing Initiatives' experience in engaging the target population is deep, trauma-informed, and very appropriate for the variety of challenges and obstacles that this population typically faces. With over 30 years experience in housing and supporting exactly this population, the staff at Housing Initiatives are arguably some of the most capable in the City of Madison. This includes extensive experience serving black, indigenous and other people of color. Such cohorts have always been overrepresented in the homeless population and have therefore been equally present in the agency's client population.

Housing Initiatives also benefits from performing all property management functions in-house. Simultaneously serving as the landlord, property manager, and service provider means that the agency is able to unify property management and services in a way that is more flexible and deeply sympathetic to the needs of this population.

18. 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.

As the principal development agent in this effort, Housing Initiatives promotes and supports equity work primarily through mission-driven work to support the very populations that have historically been marginalized, and that are overrepresented in the target homeless population. The agency makes equity training and education an ongoing part of its supportive service work, particularly in regards the direct service staff.

19. If any team member has acted as a development partner or has any ownership interest in any project currently underway or completed, please provide the following information for the team member 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 issues by Madison Police Department and/or Building Inspection in the past five years.

Housing Initiatives has received nuisance abatement notices from the Madison Police Department for the following addresses in the past five years:

- 2506 Calypso Rd #1 (December 2019)
- 2506 Calypso Rd #2 (April 2020)
- 2504 Calypso Rd #1 (December 2023)
- 706 Troy Dr. #3 (January 2024)
- 1002 W Badger Rd. #2 (April 2024)

In all cases, Housing Initiatives cooperated and networked with MPD to address the issues quickly and effectively. In cases where it involved the separation from housing, staff also connected clients with resources and other housing options.

## PROPERTY MANAGEMENT: TENANT SELECTION & AFFIRMATIVE MARKETING

20. Confirm that you have read and agree to submit an Affirmative Marketing Plan and Tenant Selection Plan consistent with the Standards found in RFP Attachments B-1 and B-2.

Yes, I confirm.

21. Describe the affirmative marketing strategy and any other strategies to engage your intended population. How will the Property Manager affirmatively market to populations that are least likely to apply? 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 are historically under-marketed in affordable housing opportunities.

Housing Initiatives has a somewhat unique approach to affirmative marketing in that the agency does not maintain its own waiting list. Rather, the agency takes most referrals directly from the Coordinated Entry system. All referrals that the agency supports with rental assistance must come from this source that is administered by the larger Continuum of Care. There is no provision in HUD regulation or CoC standards that would allow Housing Initiatives to target certain populations for service. The two threshold criteria are chronic homelessness and severed mental illness. To the degree that the Coordinated Entry system is equitable and serves under-marketed populations, then those attributes are directly reflected in the Housing Initiatives client base.

For clients that do not come through Coordinated Entry, most are referrals directly from the Veterans Administration (VA). Here again, the agency makes no policy decision to request only certain ethnicities or populations. It is the VA staff themselves that make the decisions as to which client to send to Housing Initiatives when an opening occurs. Since the agency is known for accepting the clients who present with the greatest barriers, the working practice is to refer vets that VA staff consider the most vulnerable.

22. Please address experience in and/or plans to implement inclusive and culturally-inclusive 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 agencies and/or marketing materials used. Include a list of organizations that you have partnered with in the past for marketing activities.

As mentioned in earlier responses, one of the greatest strengths of the Housing Initiatives approach is that it integrates property ownership, property management, and service provision in one organization. This allows the organization to target the most vulnerable people for service, as defined by the Dane County Continuum of Care and the Coordinated Entry system. Insofar as the clients who come to the agency present with specific cultural and ethnic backgrounds, both the property management and the services staff attempt to build communication and support resources that respect and support the clients' backgrounds. This will often involve networking with other local organizations that specialize in serving specific subpopulations.

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

Housing Initiatives maintains a primary goal of providing and maintaining housing. In practice, this means flexibility and supportive involvement whenever issues arise that jeopardize housing retention. This starts on a formal level with utilizing a series of notices to inform clients of what is happening that threatens their housing, coupled with direct intervention and supportive case management to address those issues. Furthermore, the agency always employs tools such as payment plans, networking with other support providers, coordination with probation/parole, and other arrangements to modify behavior that could result in the loss of housing. Even in cases where eviction is filed, the agency views the eviction process as an opportunity to use the legal system to gain compliance. This might involve mediation, negotiation with legal representatives, and the use of court-stipulated agreements that give clients clear opportunities to preserve housing by following court stipulations. In all cases, Housing Initiatives' prerogative is to maintain housing while simultaneously addressing the behavior that may result in eviction.

24. 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?

Housing Initiatives has not experienced any staffing shortages in the area of property management in the past five years. Although the position has turned over twice in that time frame, the agency recently increased support for those responsibilities by adding a new FTE position that operates primarily in support of property management. The agency also started outsourcing legal consultation to a third party firm that is able to provide invaluable advice and direction in the administration of some aspects of property management.

25. What percent of staff turnover did the PM experience at Madison-area properties in 2023? 0%

26. 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 Property Management staff. Discuss any other noteworthy staff retention issues or policies in place to reduce staff turnover.

No turnover in property management or maintenance staff in 2023.

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

The experience of the property management is that of 30 years of institutional knowledge that has been handed down through staff positions, as well as documented in agency policies & procedures. The current Property Manager has many years of experience working directly with the homeless population, and also benefits from a formal education in business administration. This person is also currently pursuing certification as a Certified Occupancy Specialist (COS) based on HUD regulations.

**SITE INFORMATION**

28. Address(es) of Proposed Site, if known: 1802-04 Roth St., Madison

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

- Preferred TOD Area (New Construction Only)
- Eligible Core Transit Area (New Construction Only)
- Preservation & Rehab Area (Ineligible for New Construction; Some exceptions may apply))
- Limited Eligibility Area

30. 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.

This site was chosen for several reasons: 1) There is an interested seller that is willing to negotiate on the sale of the property; 2) The site is across the street from an existing Housing Initiatives residential facility and office, which means that the neighborhood is already acclimated to this type of presence. The existing facility can also help support the proposed project administratively; 3) The zoning supports a limited version of the project, and with a minor change can support even more; 4) The proposed use is sympathetic to the uses shown in the Generalized Future Land Use Plan for this area; 5) The site is in a location that has many supportive services and amenities close at hand that will support the target population.

31. Identify the neighborhood in which the site is located: Northside Planning Council

32. Site Specific or Site-Undetermined Application:

- a. Date Site Control Secured (or anticipated): \_\_\_\_\_
- b. Site Specific application without Site Control (check if no site control)
- c. Check if Site is Yet-To-Be Identified (targeted area proposal)



**DEVELOPMENT TEAMS THAT SELECTED OPTION C IN QUESTION 32 (WITH AN UNDETERMINED SITE) CAN NOW SKIP TO APPLICATION SECTION B, AND DO NOT NEED TO COMPLETE QUESTIONS 33-65, AT THIS TIME**

33. Current zoning of the site: TR-U1 An interactive version of the Zoning Map can be found linked [here](#).

34. Will the proposed development need to seek a Zoning Map Amendment:

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

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

1. A demolition permit to raze the exiting residential home located at 1802 Roth St.
2. A Certified Survey Map to combine the lots at 1802 and 1804 as one for the purpose of a single development.
3. A rezoning from TR-U1 to TR-U2, to permit density in excess of 11 units (based on the s.f. requirement of space per unit). There is some potential to pursue a different zoning classification depending on city feedback.
4. A Conditional Use Permit to locate "offices for human service programs" as part of the project.

36. 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 Plan(s), Special Area Plans, the Generalized Future Land Use Map (interactive version linked [here](#)), and any other relevant [plans](#).

While there is no apparent neighborhood plan that addresses these parcels or this area specifically, the Comprehensive Plan and the Generalized Future Land Use Plan (GFLU) designate this area as Community Mixed Use. The plan language embraces, "existing and planned areas supporting an intensive mix of residential, commercial, and civic uses serving residents and visitors from the surrounding area and the community as a whole. CMU areas are generally located at major intersections and along relatively high-capacity transit corridors, often extending several blocks. CMU areas can generally accommodate significant development with a variety of housing options and commercial uses that attract a wide customer base." The proposed development fits perfectly with a modestly more intensive residential use (aka, missing middle housing) in an area that has abundant amenities for residents.

37. 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.?

There are no issues with Limited Eligibility. Although the site is located in a Preservation & Rehab area, there is language in the RFP that allows for new construction. Furthermore, the type of housing and the target population is in support of an identified City initiative and is therefore eligible for new construction. The site is located less than one block from a Preferred Transit Oriented Development Area.

38. Identify the distance the following amenities are from the proposed site. All distances should be entered as would be traveled by residents of the development (i.e. walking/driving distance, not straight-line distance). Limit to closest three and/or less than 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	Willy St Co-op - North	1.3
Public Elementary School	Lakeview Elementary School	1.8
Public Middle School	Sherman Middle School	0.7
Public High School	Malcolm Shabazz City High School	0.8
Job-Training Facility, Community College, or Continuing Education Programs	Madison College	2.3
Childcare	RISE Wisconsin	0.9
Public Library	Madison Public Library - Lakeview Branch	1.3

Neighborhood or Community Center	Warner Park Community Rec Center	1.8
Full Service Medical Clinic or Hospital	UW Health Union Corners Clinic	1.9
Pharmacy	Walgreens - 1725 Northport Dr.	1.5
Public Park or Hiking/Biking Trail	Warner Park	1.6
Banking	BMO Harris Bank	0.2
Retail	Northgate Mall	0.1
B-cycle Station	Madison BCycle	1.2
Other (list the amenities):	Dane County Job Center	0.1

39. What is the actual walking distance between the proposed site and the nearest seven-day per week [transit stops](#) (i.e. weekday and weekends)?

There are multiple transit stops on N. Sherman Ave, the closest of which is N Sherman @ Roth, about 150 yards down the street from the proposed project location.

40. 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.

The target location is a highly walkable neighborhood with excellent transit options as well as dedicated bike lanes on N Sherman Ave. This is the case for all the elementary, middle, and high school options which are in very close proximity.

41. 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.

As noted above, the best transit options are the extremely close Metro Transit stop, bike lanes, and sidewalks. The proposed site is readily connected by all three of these transit options to numerous amenities located along the N Sherman corridor.

42. For non age-restricted developments over 40 units, 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](mailto:kgbrown@madison.k12.wi.us)) to obtain updated current and projected capacity for the relevant schools.

Not applicable

**CITY AND COMMUNITY ENGAGEMENT PROCESSES**

43. 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 you have already presented. If you’ve not yet presented to DAT, what is the anticipated date of the presentation?

There was a preliminary meeting on 5/1/2024 with staff from the CDD, Zoning, and Planning departments. This meeting primarily addressed the process and requirements for property acquisition and environmental review. While this meeting was not a full DAT meeting, it was useful in addressing early process questions. A full DAT meeting will likely be scheduled for June or July, following proposal submission.

44. For new construction proposals, describe the neighborhood and community input process, including notification to and input from the nearby Neighborhood Association(s), already underway and planned. 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.).

To date, the only community input process has been to contact the District 12 Alder, Amani Latimer Burris. The intention is to follow the Alder's lead in organizing a public input meeting, as well as contact with any appropriate neighborhood associations. Of note, approximately a year ago, Housing Initiatives organized a public meeting with the same Alder to discuss a possible addition to a property across the street from the current proposal. This would have been the same type of housing. Other than the Alder, no one from the surrounding community attended the meeting and there were no comments or concerns otherwise expressed. Regardless of this past experience, the agency will follow through with a public input meeting. Housing Initiatives is also willing to field any comments or concerns on an ongoing basis at the agency's office, located across the street at 1110 Ruskin St.

Email notice has been sent to the contacts for Maple Wood Condominium Association and the Northside Planning Council, the two closest neighborhood-level organizations, to inform them of the project and open the door for further dialogue, a public meeting, and other meetings to discuss concerns as needed.

45. Describe the response of the alder in which the proposal is located, as well as the adjacent [Aldermanic District](#), if applicable. What issues or concerns with the project has been identified, if any? How will those be addressed?

As noted in the answer to the previous question, there has been outreach to the Alder for District 12 but no reply to date.

## SITE AMENITIES

46. Describe the interior and exterior common area amenities that will be available to tenants and/or guests, and any costs for reservation (e.g., community rooms, exercise room, business center, tot lot, grill area, etc.). What parking will be provided and at what cost? Will the cost vary by CMI level? For family developments, will there be a year-round indoor play space for children?

As a provider of permanent supportive housing, Housing Initiatives has a standard approach that will also be in place at this new facility. Since the target population is single adults who have a history of homelessness and mental health concerns, nothing about this project will be sized or designed to accommodate children. The CMI level will frequently be  $\leq 30\%$  of CMI, and always  $\leq 50\%$  CMI. All residents will have access to a free laundry room on site. There will also be one or more porch/protected areas outside where residents can enjoy time outdoors and out of the elements. Enclosed and secure bicycle parking will be provided for all residents. Most significantly, a major component of this project is to include a staff office with programming & meeting space on the first floor. The staff based at this location will offer supportive services to residents at this location and other HII properties.

47. 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 interior apartment amenities will include standard kitchen range, refrigerator, microwave, vented hood/fan, and double basin kitchen sink. The design will include heating and air conditioning that can be adjusted individually for each apartment. Basic furnishings will be provided (bed, dresser, table, chair). A full bathroom and closet space will be provided in each unit. The supportive housing model will cover the electricity, gas, and water utility costs for all units at no expense to clients.

The standard Housing Initiatives policy of no smoking indoors will apply to this facility. There will be some provision for a designated smoking space outside.

Although all units will be wired for independent internet service, there is no plan to provide that service to clients automatically or free of charge. There is significant liability in providing unregulated and unmonitored internet service to a non-employee population, such that Housing Initiatives will not provide this service. However, the agency has been successful in helping clients apply for and receive discounted service through mainstream providers.

**PROPOSAL TIMELINE**

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

<b>Activity/Benchmark</b>	<b>Estimated Month/Year of Completion</b>
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [ <i>Target/Actual Month/Date</i> ]	June 2024
1 <sup>st</sup> Development Assistance Team Meeting [ <i>Target/Actual Month/Date</i> ]	June 2024
1 <sup>st</sup> Neighborhood Meeting [ <i>Target/Actual Month/Date</i> ] (if applicable)	August 2024
Submission of Land Use Application (if applicable)	August 2024
Plan Commission Consideration	September 2024
Urban Design Commission Consideration, if applicable [ <i>Target Month/Date</i> ]	October 2024
Complete Financing	September 2024
Acquisition/Real Estate Closing	September 2024
Rehab or New Construction Bid Publishing	January 2025
New Construction/Rehab Start	March 2025
Begin Lease-Up/Marketing	October 2025
New Construction/Rehab Completion	October 2025
Certificates(s) of Occupancy Obtained	November 2025
Complete Lease-Up	December 2025
Request Final Draw of CDD Funds	December 2025

## HOUSING INFORMATION &amp; UNIT MIX

49. 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.

<b>ADDRESS #1:</b>		<b>1802 Roth St., Madison 53704</b>									
		<b># of Bedrooms</b>					<b>Projected Monthly Unit Rents, Including Utilities</b>				
<b>% of County Median Income (CMI)</b>	<b>Total # of units</b>	<b># of Studios</b>	<b># of 1 BRs</b>	<b># of 2 BRs</b>	<b># of 3 BRs</b>	<b># of 4+ BRs</b>	<b>\$ Rent for Studios</b>	<b>\$ Rent for 1 BRs</b>	<b>\$ Rent for 2 BRs</b>	<b>\$ Rent for 3 BRs</b>	<b>\$ Rent for 4+ BRs</b>
≤30%	6	4	2	0	0	0	904	1064			
40%	0	0	0	0	0	0					
50%	10	5	5	0	0	0	904	1064			
60%	0	0	0	0	0	0					
<b>Affordable Sub-total</b>	<b>16</b>	<b>9</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>0</b>					
80%	0	0	0	0	0	0					
<b>Market*</b>	0	0	0	0	0	0					
<b>Total Units</b>	<b>16</b>	<b>9</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>0</b>	Notes: Rents are calculated as 90% of Madison HUD Metro FMR. Subsidized residents pay 30% of income.				

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

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

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

50. Utilities/amenities included in rent:  Water/Sewer  Electric  Gas  Free Internet In-Unit  
 Washer/Dryer  Other: \_\_\_\_\_

51. Please list the source of calculating your utility allowance, and the total utility allowance per bedroom size:  
 Utilities Allowance Used:  CDA  DCHA  HUSM

Unit Size (Number of Bedrooms)	Total Monthly Utility Allowance (\$)
Efficiency	147
1-Bedroom	164
2-Bedroom	_____
3-Bedroom	_____

**REAL ESTATE PROJECT DATA SUMMARY**

52. 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: 1802 Roth St., Madison	2	16	2	2	0	2	289,000		Est. \$500K
Address: 1804 Roth St., Madison	0	0	0	0	0	0	44,600		Joined w/1802
Address: Enter Address 3									

53. Describe the historical use(s) 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 comprises two side-by-side parcels. One contains a residential home. The other lot is empty and contains no obvious signs or remains of any past structure. The Phase 1 Environmental Site Assessment has will not commence until there is a negotiated agreement on the sale of the property. The only issue of potential significance is the location of a wetland across the street. This is not viewed as a threat since the site is elevated relative to the wetland and there is no history of flooding at the site. Further review will need to wait for the Phase 1.

54. 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 only existing building is a residential home built in 1932. Built as a single family home, it has been divided into two apartments, one upstairs and one down. Both are currently occupied. After plan approval and relocation of the current residents, the plan would involve the demolition of this apartment home.

55. Will any business, including churches and non-profit organizations, or residential tenants (owner or rental) 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.

The only displacement will involve two tenants, the occupants of the apartments at the old residential home. These residents will be informed of their potential eligibility for relocation assistance and a plan made for that to take place relative to the larger project plan. Costs for relocation are included in the development budget.

56. 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 if available. If proposal includes rehabilitation of occupied properties will be phased over more than a year, please describe the assessment and phasing plan in detail.

Not applicable.

**ENERGY EFFICIENCY, RENEWABLE ENERGY, SUSTAINABLE DESIGN & ACCESSIBILITY**

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

Collectively, this team has extensive experience in developing projects that incorporate extraordinary energy efficiency features. In his time with Porchlight, Brad Hinkfuss was responsible for the research, design, financing, and implementation of solar thermal, photovoltaic, in-floor radiant heat, single metering, and other features that hugely reduced the energy and operational costs associated with several big project (16 units, 48 units, 32 units).

The team at Hope Community Capital also brings experience in helping its nonprofit clients navigate the direct-pay rebate for eligible technologies as discussed in the IRA. HCC recently developed the plan of finance for the City of Milwaukee to bring about the development of advanced building construction, net-zero affordable for-sale housing and is currently working with Habitat for Humanity of Milwaukee to access these funds to build net-zero homes. Though the subject project is multi-family, HCC will bring its experience with the IRA incentives and net-zero housing financing to bear.

The addition of Tyler Krupp (Threshold Development) as a support to the development team brings a strong new dimension to this process as well. He is currently developing the first unsubsidized multifamily passive house development in Madison. To the extent that his expertise can influence the features and final design of this project, it may embody best practices in efficiency, renewable energy, and sustainable design.

58. Describe the proposed project’s energy efficiency approach, design and equipment choices. For new construction proposals, please attach a copy of the confirmation page demonstrating that your organization has submitted an [Initial Application](#) for Focus on Energy’s Energy Design Assistance program once available. For rehabilitation proposals, please attach documentation confirming that your organization has reached out to Focus on Energy’s [multifamily program, once available](#).

Although there is strong desire to maximize the efficiency and sustainability dimensions of this project, it is too early to speculate as the main approach, design, or equipment approaches. No formal steps have been taken as of this submission date. However, besides this team’s established history of developing highly efficient projects, it is worth noting that the design and intent will be for Housing Initiatives to cover all utility costs for all units. This unified approach builds in strong efficiency potential which is coupled with a strong motivation for the agency to keep the utility and operational costs as low as possible.

59. 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 <i>(Initial Application submittal confirmation page is attached)</i>	<input checked="" type="checkbox"/>
Wisconsin Green Built- GOLD Standard	<input checked="" type="checkbox"/>
EPA AirPLUS	<input 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"/>

60. Please describe how this proposed development will contribute to the City’s goal of 100% renewable energy and net-zero carbon emissions community-wide by 2050. For more information, see [100% Renewable Madison Report](#). 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)? \_\_\_\_\_

What percentage of on-site electricity use is the development aiming to provide via the solar array? \_\_\_\_\_

While it remains too early in the design process to commit to specifics, the following are features that will be strongly considered, and for which the team may pursue separate funding: Photovoltaic array (size TBD base on roof area; solar thermal for hot water; geothermal; in-floor radiant heat; Energy Star appliances; and insulation & window glazing at very high performing levels.

61. 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 checked="" type="checkbox"/>	Plans to investigate & seek funding
b. Electric or heat-pump water heaters	<input checked="" type="checkbox"/>	Directive to specify and price for plans.
c. Electric stoves	<input checked="" type="checkbox"/>	Consider induction stoves, other best Energy Star performers
d. EV charging infrastructure or EV ready design ( <i>exceeding City ordinance requirements</i> )	<input type="checkbox"/>	
e. Battery storage	<input type="checkbox"/>	
f. Other:	<input type="checkbox"/>	
g. Other:	<input type="checkbox"/>	

62. New Construction Proposals Only: 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

Equity in design will be a major consideration in the design of this project since the target population is one that is historically marginalized and overlooked. Chief among the considerations will be how to promote social integration and a sense of community within the building and the larger neighborhood.

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

The U value of the windows has not yet been specified, but the team expects to maximize this performance feature. Additional funding may be sought for higher performing units.

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.

The design team anticipates utilizing fixtures and features that minimize water use to the greatest extent possible. The team will also explore options to retain all stormwater on site through rain gardens, a retention pond, or other infiltration practices.



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

Material selection has yet to be explored or specified for this project. The team at hand is equipped to make well-informed decisions to minimize waste, and to utilize minimally processed materials that still perform very well from energy performance and durability standards.

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

Trauma-informed design must be a mainstay of this project since the target audience has almost universally experienced a great deal of trauma. This standard of design is more common in some larger metro areas of the country, and the design team has connections with consultants from other areas that may influence the design of this project.

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

Although as of yet unexplored, this site provides an unusual opportunity in that there is a well-established wetland habitat located across the street. This could serve as a learning environment in which the design and programming of the building recognizes and supports the surrounding natural habitat.

g. Design for Change – Optimize operational and maintenance practices

The most meaningful way that this project embraces the Design for Change principle is within the context of the larger community. This project will help address the dire shortage of supportive housing within our community for the most vulnerable residents. It will do so by pursuing a purpose-built design that is forever geared to the needs of this community. Virtually no other organization is building this type of housing. This project - and others like it - will serve to build the larger community capacity of change.

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

This project aspires to be a prototype of what effective supportive housing design can and should be. A building built for a specific population must reflect the unique needs and circumstances of that population. In terms of scale, features, design, sustainability, efficiency, and programming that is what this project is meant to be, and that can be duplicated over and over throughout the city.

63. Describe this development's approach to accessibility. Indicate the number and percent of ADA accessible units as well as the number and percent of proposed Type A accessible units and/or convertible to Type A units as needed. Will this development exceed the minimum requirements to the greatest extent feasible? For rehab, describe the accessibility modifications that will be incorporated into the existing development.

Accessibility is a major consideration for this development since the target population often presents with major impediments to mobility over time. While there will be only two units (12%) of the overall number designated as accessible, this is due to balancing that consideration with an expensive feature like an elevator. To the extent that the upper floor units can be made more accessible in various smaller design considerations, they will be made so.

64. Describe this development's level of commitment to the principles of Universal Design. Explain the extent to which the development team will incorporate the greatest feasible levels of Universal Design in residential units, commercial spaces, and in common areas. What percentage or number of units in the proposed development will incorporate Universal Design principles? What percent of units will be visitable?

This is discussion that has yet to take place with the development team so it would be premature to commit to any particular level. However, the experience, track record, and knowledge that is present in the collective design team suggests that the principles of Universal Design will be a major consideration in this project.

## REFERENCES

65. 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
Jim O'Keefe	Professional contact	JOKeefe@cityofmadison.com	
Marsha Rummel	Professional/Personal	district6@cityofmadison.com	
Doug Kirk	Hill Board of Directors	dakirk531r@gmail.com	

**DEVELOPMENT TEAMS WITH AN IDENTIFIED SITE (AND HAVE COMPLETED QUESTIONS 32-65) DO NOT NEED TO COMPLETE SECTION B.**

**SECTION B – TARGETED AREA ONLY (No Identified Site)**

**SITE INFORMATION**

1. General Area of Proposed Sites: \_\_\_\_\_
2. If applicable, please identify in which of the following areas on the Affordable Housing Targeted Area Map your proposal is generally located in, or that you anticipate you will target. If the area targeted for your proposal is larger or consists of multiple areas, please select one of the following that comprises the majority of your target area.
  - Preferred Area (New Construction Only)
  - Super-Preferred Area (New Construction Only)
  - Eligible Area (New Construction & Acquisition/Rehabilitation)
  - Targeted Rehab Area (Ineligible for New Construction, but preferred for acquisition & rehabilitation)

3. Explain why this area was chosen. How does it help the City to expand affordable housing opportunities in areas of greatest impact? How will this area assist in providing neighborhood-serving benefits?

4. Describe the type of housing project you propose to develop (i.e. new construction, preservation or acquisition and rehab)?

5. Number of units you anticipate developing in the targeted area: \_\_\_\_\_

6. Identify the following amenities that exist in the area which you have identified. If an amenity/service does not exist within the area, determine and list the next closest location.

Type of Amenities & Services	Name of Facility	In Targeted Area? (yes/no)
Full Service Grocery Store		
Public Elementary School		
Public Middle School		
Public High School		
Job-Training Facility, Community College, or Continuing Education Programs		
Childcare		
Public Library		
Neighborhood or Community Center		
Full Service Medical Clinic or Hospital		
Pharmacy		
Public Park or Hiking/Biking Trail		
Banking		
Retail		
Other (list the amenities):		

7. Are there seven-day per week transit stops (i.e. weekday and weekends) in or adjacent to your targeted area?

8. Describe your experience in gaining necessary planning and zoning-related approvals (rezoning, conditional use permit, demolition, etc.) that have been obtained for other developments. Are there adequate sites available in this targeted area that can feasibly identify and develop within the timeframe listed in the RFP? Please explain how you anticipate selecting a site(s).

9. Describe the your anticipated project and targeted area’s consistency with adopted [plans](#), including the City of Madison Comprehensive Plan (adopted 2018), Neighborhood Plan(s), Special Area Plans, the Generalized Future Land Use Map (interactive version linked [here](#)), and any other relevant [plans](#).

**CITY AND COMMUNITY ENGAGEMENT PROCESSES**

10. Describe your familiarity with this neighborhood and community. Have you previously worked with this Neighborhood Association(s) or Alder? Describe the response of the alderperson in which the proposal is located, as well as the adjacent alderperson(s), if applicable. What issues or concerns with your anticipated project have been identified, if any? How will those be addressed? Please note new Aldermanic Districts that went into effect January 1, 2022.

**SITE AMENITIES**

Specific details of site amenities will be asked in a supplemental application submittal once a site(s) has been identified, as a component of City approvals before funding allocated.

**ENERGY EFFICIENCY, RENEWABLE ENERGY & SUSTAINABLE DESIGN**

11. What is your organization’s experience in developing projects that incorporate extraordinary sustainable, energy efficient, and/or green building design techniques? Please list any awards, industry standards or third-party certifications achieved on projects developed in the past ten years, LEED®, WELL, Passive House, etc.

12. Please describe how proposed developments will contribute to the City’s goal of 100% renewable energy and zero-net carbon emissions (originally adopted March 21, 2017). For more information, see [100% Renewable Madison Report](#).

13. Describe this development team's past approach to accessibility. Will any proposed development meet or exceed the minimum requirements? For rehab, describe the accessibility modifications that will be incorporated into existing developments.

14. Describe this your agency's commitment to the principles of Universal Design. Elaborate on how your agency has incorporated Universal Design components in residential units, any commercial space, and in common areas. Do you anticipate that your agency will exceed building code standards for Type A units? Once a site is identified, what percentage or number of units in any proposed developments will incorporate Universal Design principles?

**ONLY DEVELOPMENT TEAMS APPLYING FOR HOME-ARP FUNDS MUST COMPLETE SECTION C. ALL OTHER APPLICANTS MAY PROCEED TO PAGE 21.**

## SECTION C – HOME-ARP FUNDS – HOMELESSNESS & HOUSING STABILITY

Applicants seeking HOME-ARP funds, must also complete the following questions.

1. Please confirm that the development team, including property management and supportive service coordinator, have read and understand Attachment E which outlines the requirements of the HOME-ARP program.  
 Yes, I confirm.
2. Please describe the proposed development's integrated supportive housing approach to serve the target populations. Provide the number and percent of Integrated Supportive Housing Units proposed utilizing HOME-ARP and adhering to its requirements. Describe how the HOME-ARP units created in this project will serve the following HUD required Qualifying Populations:
  - a. Those who are homeless as defined under 24 CFR 91.5
  - b. Those who are at imminent risk of homelessness as defined in 24 CFR 91.5
  - c. Those who are fleeing, or attempting to flee, domestic violence, dating violence, sexual assault, stalking, or human trafficking, as defined by HUD.
  - d. Other populations where assistance would prevent the family's homelessness or serve those with the greatest risk of housing instability.

Housing Initiatives will extend the agency's existing supportive service approach to the target population, which is in principle and practice the same population that the agency already serves. This supportive services approach adheres to the principles of Housing First for all clients. Supportive services are offered to all incoming clients on day one, concurrent to leasing. The option for voluntary supportive services remains present throughout every client's tenancy, including regular check-ins, annual assessments, and service plans configured to individual needs.

Of the 16 units proposed in this project, 11 (69%) will be developed using HOME-ARP funds. The balance of the units will utilize alternate funding, but those units will still follow the integrated supportive service model. This integrated model has already been the standard that the agency has carried forward for years and for all clients.

As described in Housing Initiatives' Tenant Selection Plan, the primary means of accepting new clients is through the Continuum of Care Coordinated Entry process. When there is a shortage of either available subsidy funds or eligible clients, then the agency relies on other support agencies (e.g., Veterans Administration) to supply clients. Such clients that come through other sources still meet the criteria of homelessness and mental health disability. Many of these clients - whether through Coordinated Entry or other sources - meet the criteria for other qualifying populations even though they are not explicitly written into the Tenant Selection Plan (e.g., domestic violence, human trafficking, etc.)

3. Please identify the per-unit cost of the HOME-ARP units in your project: \_\_\_\_\_
4. 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.

The organizational and staffing structure of Housing Initiatives already combines the functions of principle developer, property manager, and lead supportive service coordination agency under one the umbrella of the same agency. The facilitates the best possible coordination of property management and services. From a development perspective, the units and overall facility design will engage a purpose-built and trauma informed philosophy that anticipates the target population. Based on successs with other properties, the approach with this one will be to keep the overall size small enough to minimize disruption, but big enough to achieve efficiencies of staffing, features, and services.

5. 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.)? How will these entities work together to ensure a successful development well-integrated with the immediate neighborhood and community?

As described in the answer to the previous question, Housing Initiatives already houses the property management and supportive services functions and staff within the same organization. This makes for the best possible coordination and provision of services. This extends not only to clients in the building, but also the surrounding neighborhood and community. There is no disconnect between property management concerns, maintenance responses, and supportive service interventions between staff and clients.

It is worth noting that Housing Initiatives is not the sole service provider for all clients housed in the agency's properties. The agency enjoys strong relationships with many other service providers that have direct relationships with clients. Examples include the Veterans Administration, Tellurian, Journey Mental Health, Porchlight, The Road

Home, the Aging and Disability Resource Center, Dane County Human Services, and many more. Housing Initiatives property management and supportive services staff have regular contact with many of these service providers. This is particularly valuable at the intersection of property management concerns and supportive service interventions. Housing Initiatives' role as the landlord often makes a crucial difference in working with service providers to preserve housing and achieve favorable outcomes.

6. Describe the planned approach that the development team will utilize to engage with and center the voices of the Qualifying Populations in the design of the proposed development using trauma-informed design?

Housing Initiatives already has several clients serving on its Board of Directors. In addition to their input, focus groups will be convened to seek direct input from other clients. All of these clients will have come to the agency as members of Qualifying Populations. They represent a tremendous resource in using trauma-informed design and best practices for the target populations.

7. Describe the development team's experience using a Housing First approach to supportive housing?

Housing Initiatives has been fully embracing the Housing First approach for at least the past 10 years. It is already a directive handed down from HUD and tied to other funding that the agency receives to support many clients' rent. Starting around 2014, the agency simultaneously established a supportive service division of its staff. Previously, the organization had relied entirely on the services of other agencies to meet clients' service needs. With 10 years of experience, and employing qualified and experienced staff, the agency fully intends to continue using the Housing First approach on this project and all others in the agency's portfolio.

8. Please submit a Support Service Plan with your application. This plan should highlight the following elements:

**a. Operations Plan**

- i. Affirmative Marketing Plan (must meet Affirmative Marketing Plan Standards).
- ii. Tenant Selection Plan (must meet Tenant Selection Plan Standards and HOME-ARP guidelines, including a Housing First approach).
- iii. Staffing needs (i.e. %FTE and ratio of staff per household, etc.).
- iv. Lease up Coordination – detail how property management will work with the support service provider and partner agencies to seek referrals for vacant units.
  1. Describe the process for using Coordinated Entry to seek referrals of the prioritized qualifying population (households experiencing homelessness).
  2. Describe how property management will ensure that households who are unserved by Coordinated Entry but otherwise meet the HUD definition of the Qualifying Population will have access to HOME-ARP units through a waitlist.
  3. Describe the process to lease non-HOME-ARP units, if applicable.
- v. Outreach Strategies – how the property will engage its residents in the supportive services offered.
- vi. Resident Assessment – how will case managers assess the supportive service needs of individual residents.
- vii. Support Service Coordination
  1. Description of the type(s) and level of supportive services offered.
  2. Describe what services are provided on-site.
  3. Identify partnerships, if any, with supportive service agencies that have been or will be formed to serve the target population. How will external services be accessed.

**b. Budget and Spending Plan:**

- i. 5-year budget projection on support service costs and sources.
- ii. Resource Management:
  1. How will funding required for providing services outlined in the plan will remain available over time.
  2. Identify how HOME-ARP service funds will be budgeted over-time.
- iii. Spending Plan: a detailed explanation of how the supportive services funds will be spent and how that fits into the property's Supportive Services Plan.

1. Specifically identify how HOME-ARP service funds will be spent.



The following attachments are included with this application:

**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 via Worksheets 1-4 (Agency Overview, Capital, and Expenses, Proforma).
- 2. A detailed map of the site, for development proposals with an identified site,
- 3. A map using the AHF Affordable Housing Targeted Area Map, indicating the site in the context of the City.
- 4. A preliminary site plan and one to two renderings, if available.
- 5. A Capital Needs Assessment report of the subject property, or similarly detailed rehab phasing and cost report, if the proposal is for a rehabilitation project and if the report is available at the time of application.
- 6. A recent market study or informal analysis, if available at the time of application.
- 7. For rental development proposals with more than one owner, a Project Organizational Chart, including ownership interest percentages.
- 8.a. Tenant Selection Plan consistent with the City's Standards outlined in Attachment B-1, if one is available at time of application.
- 8.b. Affirmative Marketing Plan consistent with the CDD's AMP Standards outlined in Attachment B-2, if one is available at time of application.

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

<b>Application Item</b>	<b>Due Date</b>
Preliminary Site Plan	A week prior to Development Assistance Team (DAT)
Capital Needs Assessment	Supplemental Application
Market study/Analysis <i>(Required for new construction proposals seeking HOME funds)</i>	Supplemental Application
Proposals with an Undetermined Site, Questions 33-65	Supplemental Application

**APPLICANT & PROJECT NAME:**

**Housing Initiatives, Inc. - Safe-Stable-Supportive (S3) Housing**

**2. 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	Financing Approval Anticipated (Mo/Yr)
Permanent Loan-Lender Name:							
Subordinate Loan-Lender Name:							
Subordinate Loan-Lender Name:							
Tax Exempt Loan-Bond Issuer:							
FHLB-AHP Loan							
City Loan Request (AHF/HOME)							
City-Loan HOME-ARP (Development Funds)	\$ 3,056,197		0.00%				
City-Loan Request (TIF)							
Other-Specify Lender/Grantor:							
<b>Forward Community Investment (FCI)</b>	<b>\$ 574,803</b>		<b>7.50%</b>				
Other-Specify Lender/Grantor:							
Other-Specify Lender/Grantor:							
Historic Tax Credit Equity							
Deferred Developer Fees							
Owner Investment							
Other-Specify:							
<b>Total Sources</b>	<b>\$ 3,631,000</b>						

<b>Construction Financing</b>			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
<b>Forward Community Investment F(FCI)</b>	<b>\$ 574,803</b>	<b>7.50%</b>	<b>14</b>
Bridge Loan-Lender Name:			
Historic Tax Credit Equity:			
<b>Total</b>	<b>\$ 574,803</b>		

Remarks Concerning Project Funding Sources:

APPLICANT: **Housing Initiatives, Inc.**

3. PROJECT EXPENSES

Enter the proposed project expenses

Acquisition Costs	Amount
Land	\$500,000
Existing Buildings/Improvements	\$0
Other (List)	\$0
<b>Construction:</b>	
Construction/Rehab Costs	\$2,027,000
Construction Profit	\$101,350
Construction Overhead	\$40,540
General Requirements	\$101,350
Construction Supervision	\$0
FF&E/Personal Property	\$0
Demolition	\$24,000
Site Work	\$10,000
Landscaping	\$20,000
Letter of Credit/P&P Bond	\$12,000
Construction Contingency	\$232,124
Other (List)	\$0
<b>Architectural &amp; Engineering</b>	
Architect - Design	\$50,675
Architect - Supervision	\$10,000
Engineering	\$15,000
Other (List)	\$0
<b>Interim/Construction Costs</b>	
Builder's Risk/Property Insurance	\$10,000
Construction Loan Interest	\$24,115
Construction Loan Origination Fee	\$0
Real Estate Taxes	\$5,000
Park Impact Fees	\$0
Other Impact Fees	\$3,000
Other (List)	\$0
<b>Financing Fees</b>	
Cost of Bond Issuance	\$0
Permanent Loan Origination Fee	\$5,748
Credit Enhancement	\$0
Other Permanent Loan Fees	\$5,000
<b>Soft Costs</b>	
Appraisal	\$4,000
Market Study	\$4,000
Environmental Reports	\$3,000
Survey	\$7,000
Permits	\$3,500
Lease-Up Period Marketing	\$1,000
Accounting/Cost Certification	\$0
Title Insurance and Recording	\$3,000
Relocation	\$18,400
FF&E	\$60,000
Capital Needs Assessment (if rehab)	\$0
Legal	\$18,400
Other (List)	\$0
<b>Fees:</b>	
Bridge Loan Fees	\$0
Organizational Fees	\$3,000
Syndication Fees	\$0
Total Development Fee	\$290,480
Developer Overhead	\$0
Other Consultant Fees	\$0
Other (List)	\$0
Soft Cost Contingency	\$7,165
<b>Reserves Funded from Capital:</b>	
Lease-Up Reserve	\$4,000
Operating Reserve	\$0
Replacement Reserve	\$8,000
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$0
Other: (List)	\$0
<b>TOTAL COSTS:</b>	<b>\$3,631,847</b>

<--- 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: \$0

APPLICANT: Housing Initiatives, Inc.

4. PROJECT PROFORMA

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

	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	Year 16
Gross Income	187,008	190,748	194,563	198,454	202,423	206,472	210,601	214,813	219,110	223,492	227,962	232,521	237,171	241,915	246,753	251,688
Less Vacancy/Bad Debt	9,350	9,537	9,728	9,923	10,121	10,324	10,530	10,741	10,955	11,175	11,398	11,626	11,859	12,096	12,338	12,584
<b>Income from Non-Residential Use*</b>		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Revenue</b>	177,658	181,211	184,835	188,532	192,302	196,148	200,071	204,073	208,154	212,317	216,564	220,895	225,313	229,819	234,415	239,104
<b>Expenses:</b>																
Office Expenses and Phone	12,000	12,360	12,731	13,113	13,506	13,911	14,329	14,758	15,201	15,657	16,127	16,611	17,109	17,622	18,151	18,696
Real Estate Taxes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Advertising, Accounting, Legal Fees	1,000	1,030	1,061	1,093	1,126	1,159	1,194	1,230	1,267	1,305	1,344	1,384	1,426	1,469	1,513	1,558
Payroll, Payroll Taxes and Benefits	5,000	5,150	5,305	5,464	5,628	5,796	5,970	6,149	6,334	6,524	6,720	6,921	7,129	7,343	7,563	7,790
Property Insurance	7,000	7,210	7,426	7,649	7,879	8,115	8,358	8,609	8,867	9,133	9,407	9,690	9,980	10,280	10,588	10,906
Mtc, Repairs and Mtc Contracts	19,000	19,570	20,157	20,762	21,385	22,026	22,687	23,368	24,069	24,791	25,534	26,300	27,089	27,902	28,739	29,601
Utilities (gas/electric/fuel/water/sewer)	31,222	32,159	33,123	34,117	35,141	36,195	37,281	38,399	39,551	40,738	41,960	43,219	44,515	45,851	47,226	48,643
Property Mgmt	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668	13,048	13,439	13,842	14,258	14,685	15,126	15,580
Operating Reserve Pmt		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	12,000	12,360	12,731	13,113	13,506	13,911	14,329	14,758	15,201	15,657	16,127	16,611	17,109	17,622	18,151	18,696
Support Services	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668	13,048	13,439	13,842	14,258	14,685	15,126	15,580
Other (List)																
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Operating Expenses</b>	107,222	110,439	113,752	117,164	120,679	124,300	128,029	131,870	135,826	139,900	144,097	148,420	152,873	157,459	162,183	167,048
<b>Net Operating Income</b>	70,436	70,772	71,083	71,367	71,623	71,849	72,043	72,203	72,329	72,417	72,466	72,475	72,440	72,360	72,233	72,055
<b>Debt Service:</b>																
First Mortgage	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Debt Service</b>	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229
<b>Total Annual Cash Expenses</b>	155,451	158,668	161,981	165,393	168,908	172,529	176,258	180,099	184,055	188,129	192,326	196,649	201,102	205,688	210,412	215,277
<b>Total Net Operating Income</b>	22,207	22,543	22,854	23,138	23,394	23,620	23,814	23,974	24,100	24,188	24,237	24,246	24,211	24,131	24,004	23,826
<b>Debt Service Reserve</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Deferred Developer Fee</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Cash Flow</b>	22,207	22,543	22,854	23,138	23,394	23,620	23,814	23,974	24,100	24,188	24,237	24,246	24,211	24,131	24,004	23,826
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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

<b>DCR Hard Debt</b>	1.46	1.47	1.47	1.48	1.49	1.49	1.49	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.49
<b>DCR Total Debt</b>	1.46	1.47	1.47	1.48	1.49	1.49	1.49	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.50	1.49

**Assumptions**

Vacancy Rate	5.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

\*Please list all fees (per unit per month) and non-residential income:

This model shows year one beginning in January of 2024

APPLICANT:

Housing Initiatives, Inc.

3. PROJECT PROFORMA (cont.)

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

	Year 17	Year 18	Year 19	Year 20	Year 21	Year 22	Year 23	Year 24	Year 25	Year 26	Year 27	Year 28	Year 29	Year 30
Gross Income	256,722	261,856	267,093	272,435	277,884	283,442	289,111	294,893	300,791	306,806	312,943	319,201	325,585	332,097
Less Vacancy/Bad Debt	12,836	13,093	13,355	13,622	13,894	14,172	14,456	14,745	15,040	15,340	15,647	15,960	16,279	16,605
<b>Income from Non-Residential Use*</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Revenue</b>	243,886	248,764	253,739	258,814	263,990	269,270	274,655	280,148	285,751	291,466	297,295	303,241	309,306	315,492
<b>Expenses:</b>														
Office Expenses and Phone	19,256	19,834	20,429	21,042	21,673	22,324	22,993	23,683	24,394	25,125	25,879	26,655	27,455	28,279
Real Estate Taxes	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Advertising, Accounting, Legal Fees	1,605	1,653	1,702	1,754	1,806	1,860	1,916	1,974	2,033	2,094	2,157	2,221	2,288	2,357
Payroll, Payroll Taxes and Benefits	8,024	8,264	8,512	8,768	9,031	9,301	9,581	9,868	10,164	10,469	10,783	11,106	11,440	11,783
Property Insurance	11,233	11,570	11,917	12,275	12,643	13,022	13,413	13,815	14,230	14,656	15,096	15,549	16,015	16,496
Mtc, Repairs and Mtc Contracts	30,489	31,404	32,346	33,317	34,316	35,346	36,406	37,498	38,623	39,782	40,975	42,204	43,471	44,775
Utilities (gas/electric/fuel/water/sewer)	50,102	51,605	53,153	54,748	56,390	58,082	59,825	61,619	63,468	65,372	67,333	69,353	71,434	73,577
Property Mgmt	16,047	16,528	17,024	17,535	18,061	18,603	19,161	19,736	20,328	20,938	21,566	22,213	22,879	23,566
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	19,256	19,834	20,429	21,042	21,673	22,324	22,993	23,683	24,394	25,125	25,879	26,655	27,455	28,279
Support Services	16,047	16,528	17,024	17,535	18,061	18,603	19,161	19,736	20,328	20,938	21,566	22,213	22,879	23,566
Other (List)														
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Expenses</b>	172,060	177,222	182,538	188,014	193,655	199,465	205,448	211,612	217,960	224,499	231,234	238,171	245,316	252,676
<b>Net Operating Income</b>	71,826	71,542	71,201	70,799	70,335	69,805	69,207	68,536	67,791	66,967	66,061	65,070	63,990	62,817
<b>Debt Service:</b>														
First Mortgage	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Debt Service</b>	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229	48,229
<b>Total Annual Cash Expenses</b>	220,289	225,451	230,767	236,243	241,884	247,694	253,677	259,841	266,189	272,728	279,463	286,400	293,545	300,905
<b>Total Net Operating Income</b>	23,597	23,313	22,972	22,570	22,106	21,576	20,978	20,307	19,562	18,738	17,832	16,841	15,761	14,588
<b>Debt Service Reserve</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Deferred Developer Fee</b>	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Cash Flow</b>	23,597	23,313	22,972	22,570	22,106	21,576	20,978	20,307	19,562	18,738	17,832	16,841	15,761	14,588
AHF City Interest Loan	0	0	0	0	0	0	0	0	0	0	0	0	0	0

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

<b>DCR Hard Debt</b>	1.49	1.48	1.48	1.47	1.46	1.45	1.43	1.42	1.41	1.39	1.37	1.35	1.33	1.30
<b>DCR Total Debt</b>	1.49	1.48	1.48	1.47	1.46	1.45	1.43	1.42	1.41	1.39	1.37	1.35	1.33	1.30

**Assumptions**

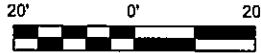
Vacancy Rate	5.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	

# Plat of Survey

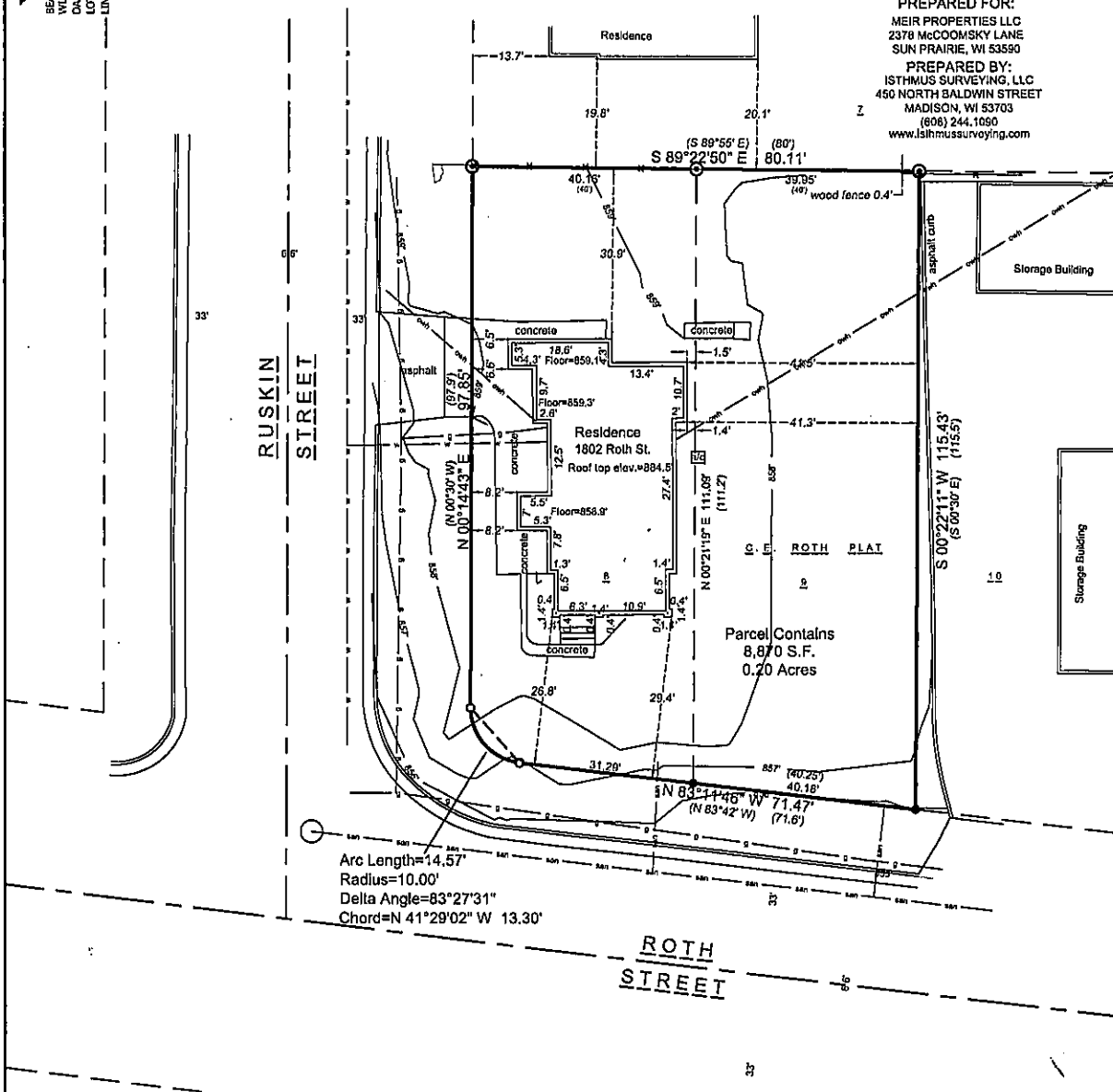
Legal Description of Record: Document No. 5668777

Lot Eight (8) and Lot Nine (9), C.E. Roth Plat in the City of Madison,  
Dane County, Wisconsin

BEARINGS ARE REFERENCED TO THE  
WISCONSIN COUNTY COORDINATE SYSTEM  
DANE COUNTY ZONE, THE WEST LINE OF  
LOT 8, C.E. ROTH PLAT & EASTERLY RW  
LINE OF RUSKIN STREET BEARS N 00°14'43" E



PREPARED FOR:  
MEIR PROPERTIES LLC  
2378 MCCOOMSKY LANE  
SUN PRAIRIE, WI 53590  
PREPARED BY:  
ISTHMUS SURVEYING, LLC  
450 NORTH BALDWIN STREET  
MADISON, WI 53703  
(608) 244.1090  
www.isthmussurveying.com



Arc Length=14.57'  
Radius=10.00'  
Delta Angle=83°27'31"  
Chord=N 41°29'02" W 13.30"

**Notes:**

1. Building dimensions and associated offset distances were measured along the outside of the siding.
2. This parcel may be subject to, or benefit from, Easements or agreements, written or otherwise, not shown hereon.
3. Site was snow covered on survey date. Some hardscapes may not be shown.
4. Utilities are shown as visible or marked. Location to be considered approximate for planning purposes and should not be relied as accurate enough to use for Digging purposes. Call Digger's Hotline (811) prior to any excavation.

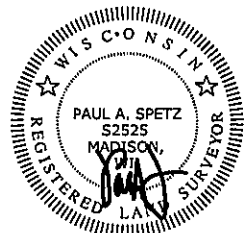
**LEGEND**

- SOLID IRON ROD FOUND (0.75" Dia, unless noted)
  - ⊙ IRON PIPE FOUND (1" Outside Diam, unless Noted)
  - ⊙ 3/4"x18" SOLID IRON ROD SET 1.50Lbs/LINEAL FOOT.
- ( ) INDICATES RECORDED AS DISTANCES ARE MEASURED AS THE NEAREST HUNDRETH OF A FOOT.

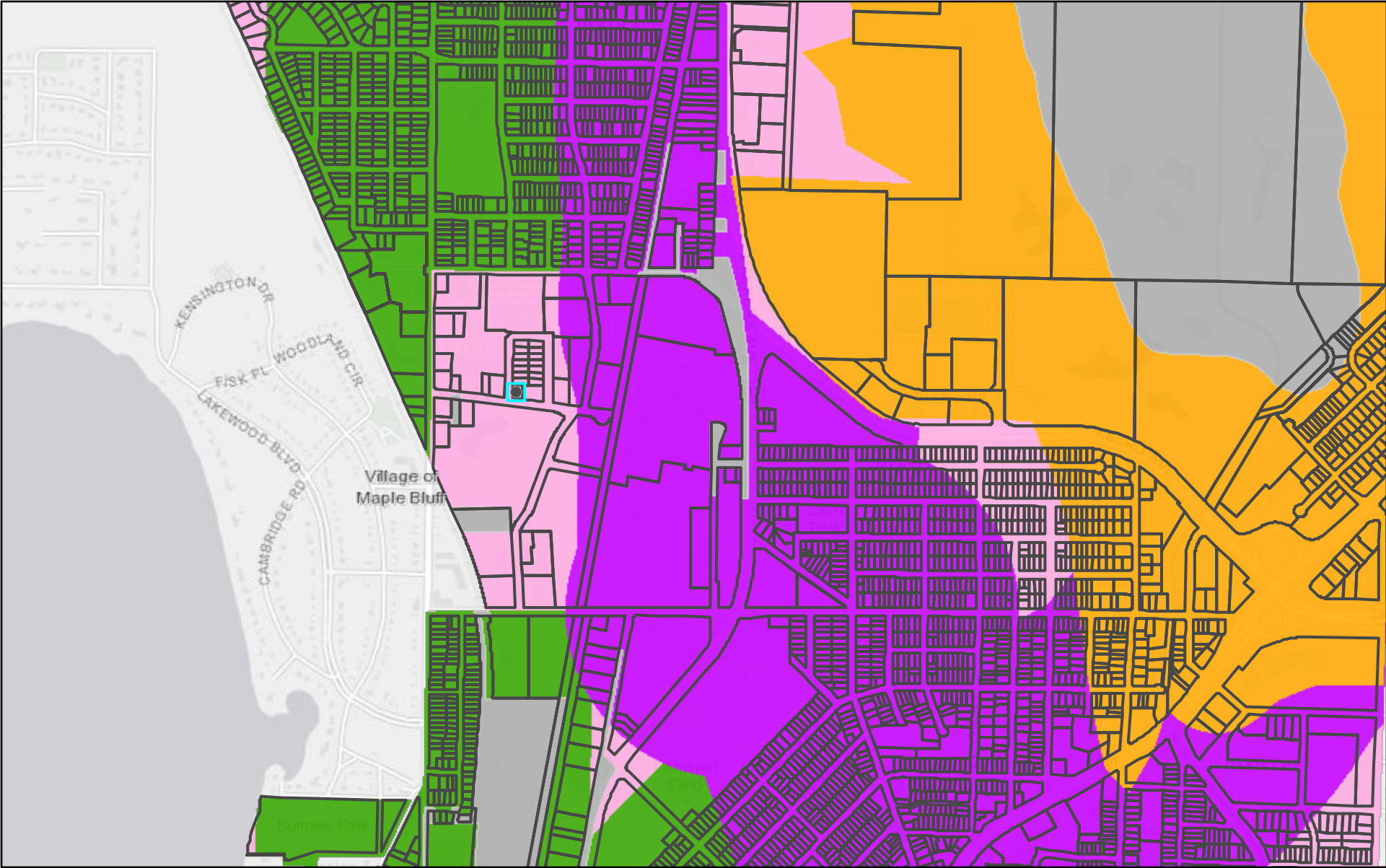
**SURVEYOR'S CERTIFICATE**

I, Paul A. Spetz, registered land surveyor for Isthmus Surveying LLC, hereby certify that we surveyed the property described above and that the map is a true representation thereof and shows the size and location of the property, visible improvements, potential encroachments and it's exterior boundaries. Said survey meets the minimum standards for property surveys of the Wisconsin Administrative Code (A-E7) and the map hereon is correct to the best of my knowledge and belief. This Survey is solely for the use of the present owners of the property at the date below.

Dated this 21st Day of December, 2020: Paul A. Spetz, S 2525

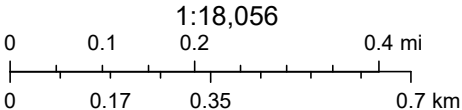


# AHF Target Area Map - 1802 Roth St

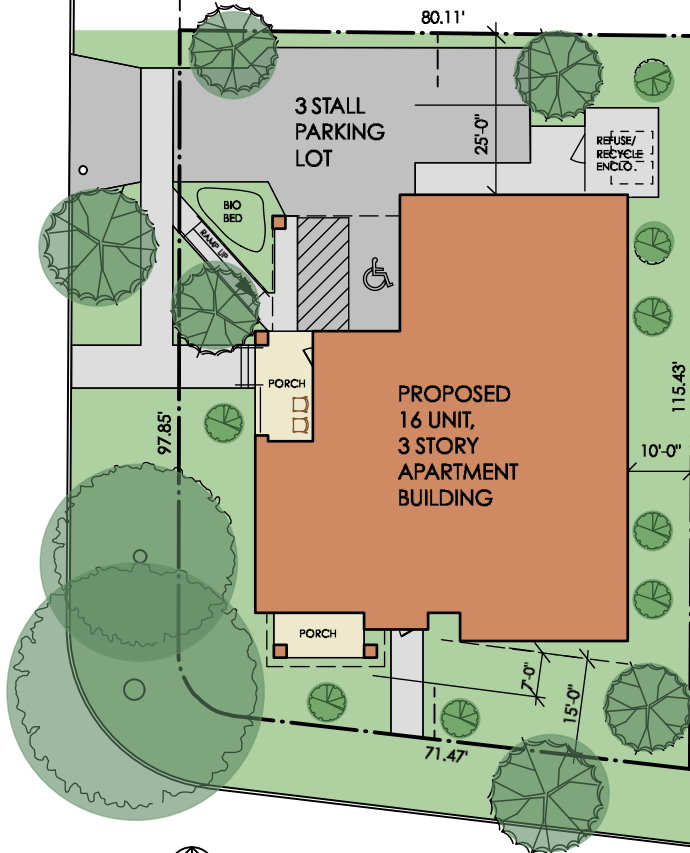


5/30/2024, 10:50:04 AM

- Property\_Lookup - Parcels
- Eligible Core
- Limited Eligibility
- Preservation Rehab
- Preferred TOD
- Ineligible



County of Dane, Esri, HERE, Garmin, GeoTechnologies, Inc., USGS, EPA, County of Dane, Esri, HERE



**SITE PLAN**  
0 15' 30'

**ZONING STATISTICS:  
PROPOSED TR-U2 DISTRICT:**

SITE ACREAGE: 8,870 sq. ft. (0.20 acres)

SITE AREA: (WITH NEW ADDITION)  
 BUILDING FOOTPRINT 3,556 sq. ft. 40.1%  
 PAVEMENT 1,956 sq. ft. 22.1%  
 PERVIOUS AREA 3,358 sq. ft. 37.8%  
 (MAX. LOT COVERAGE = 62.2% sq. ft. < 75% allowed)

USEABLE OPEN SPACE:  
 REQUIRED: 16 UNITS (40) = 640 sq. ft.  
 PROVIDED: 725 sq. ft.

LOT AREA PER APARTMENT UNIT:  
 16 UNITS (350) = 5,600 sq. ft. required, 8,870 provided.

PARKING REQUIRED:  
 APARTMENTS: 1/UNIT (16) + 600 SF/300 = 16 STALLS  
 OFFICE: 600 SF/300 2 STALLS  
 TOTAL REQUIRED 18 STALLS

PARKING PROVIDED: 3 STALLS

BIKE PARKING REQUIRED: 1/UNIT + 3 GUESTS = 19 STALLS



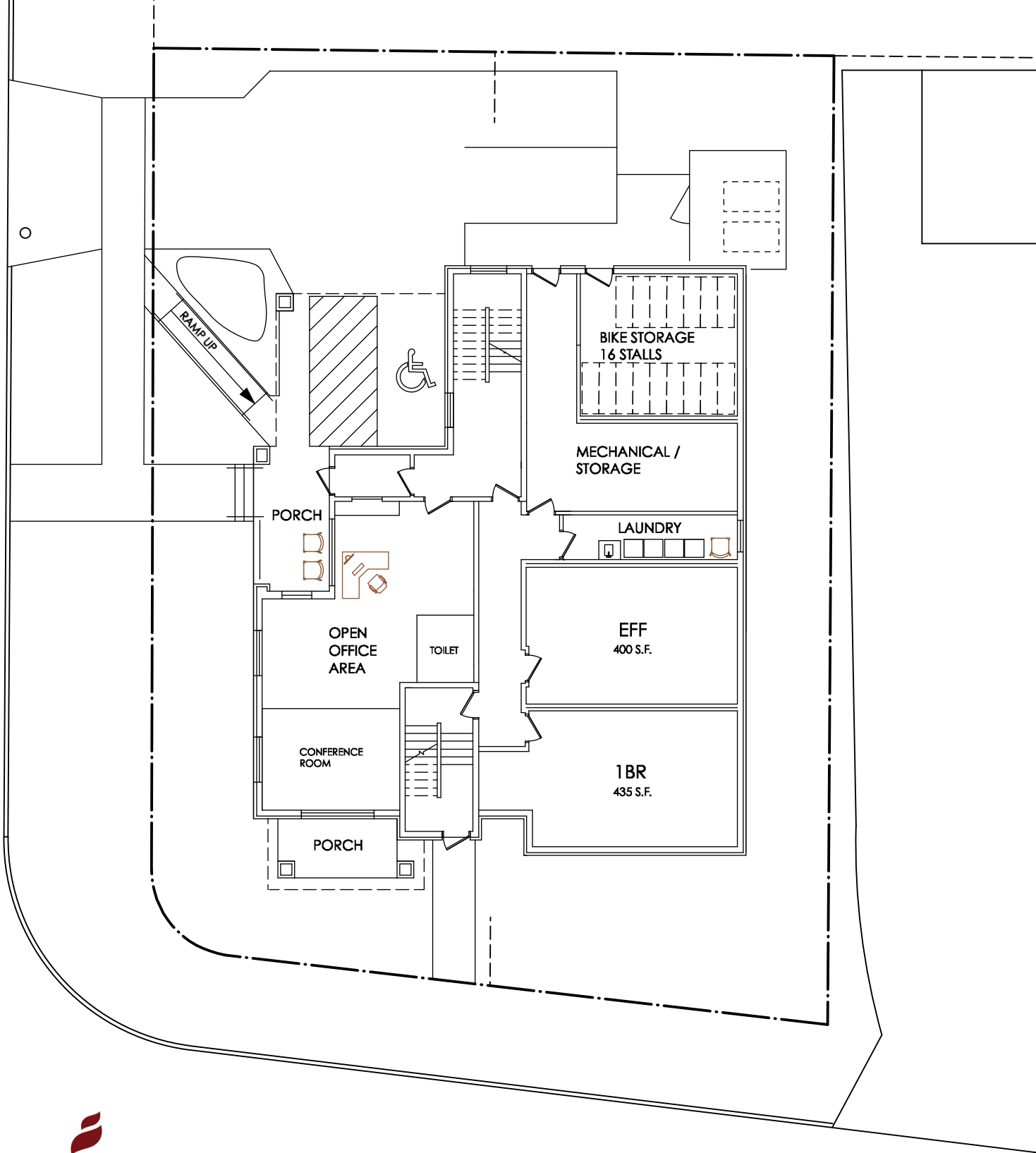
**HOUSING  
INITIATIVES**

**1804 ROTH ST DEVELOPMENT  
MADISON, WI**

FERCH ARCHITECTURE  
 2704 GREGORY STREET, MADISON, WI 53711  
 608-238-6900 david@fercharchitecture.com

5/14/2024





# HOUSING INITIATIVES

## 1804 ROTH ST DEVELOPMENT MADISON, WI

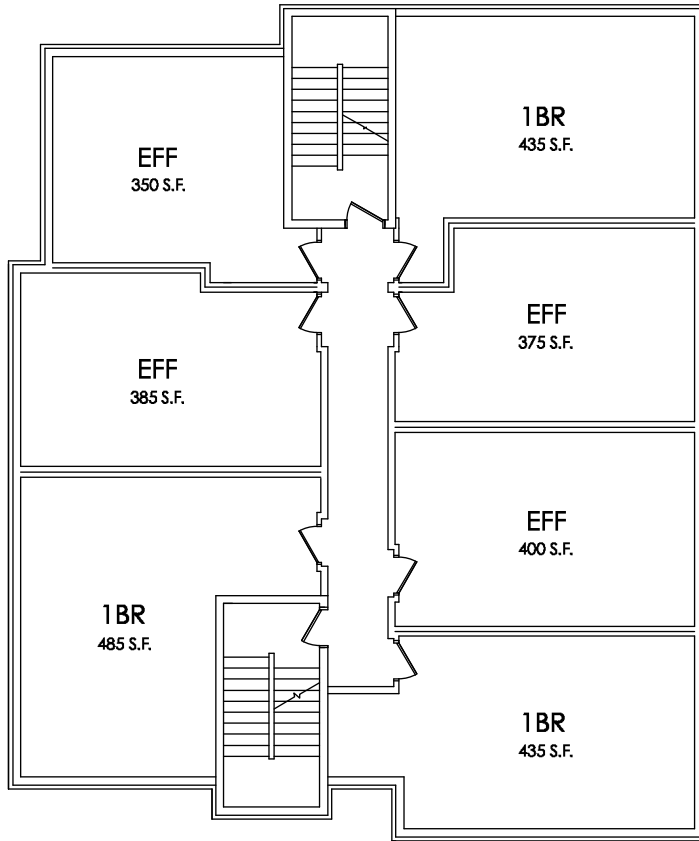
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3,450 SQ. FT.  
1ST FLOOR PLAN

0 8' 16' 32'



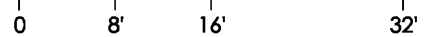
**UNIT COUNT**

	EFF	1BR
1ST	1	1
2ND	4	3
3RD	4	3
TOTAL	9	7

16 TOTAL APARTMENT UNITS

3,800 SQ. FT.

2ND & 3RD FLOOR PLAN

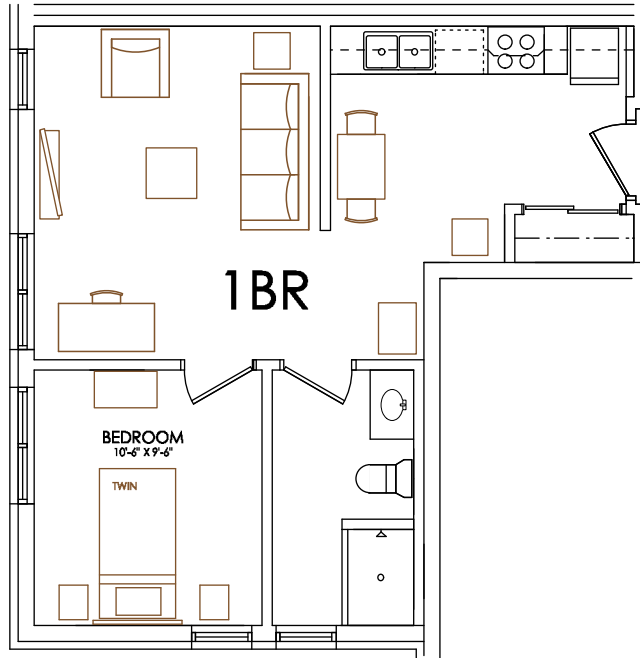


**HOUSING  
INITIATIVES**

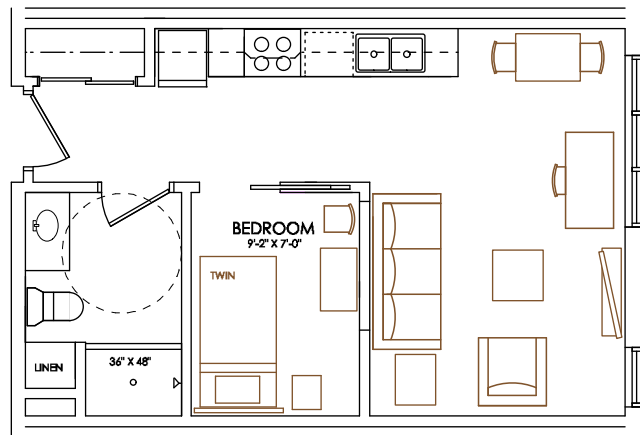
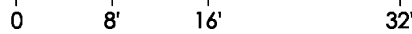
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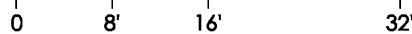
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ONE BEDROOM UNIT



EFFICIENCY UNIT



**HOUSING  
INITIATIVES**

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**Housing Initiatives - Supportive Service Budget 2.0**

## 5-Year Services Budget Projection

<b>Income:</b>	Year 1	Year 2	Year 3	Year 4	Year 5
General Operating Revenue	176,000	181,280	186,718	192,320	198,090
Permanent Housing Grant	91,000	91,000	91,000	91,000	91,000
Supportive Services Grant	30,000	35,000	35,000	35,000	35,000
Comprehensive Community Services	20,000	24,000	26,000	28,000	30,000
<b>Supportive Services Expansion</b>	<b>331,235</b>	<b>331,235</b>	<b>331,235</b>	<b>331,235</b>	<b>331,235</b>
<b>City of Madison HOME/ARPA funds</b>	<b>208,000</b>	<b>214,240</b>	<b>220,667</b>	<b>227,287</b>	<b>234,106</b>
<b>Total Revenue</b>	<b>856,235</b>	<b>876,755</b>	<b>890,621</b>	<b>904,842</b>	<b>919,430</b>

<b>Expenses:</b>					
Four (3-4) FTE Case Mngmt. (general)	317,000	326,510	336,305	346,394	356,786
Two (2) FTE Case Mngmt. (intervention)	232,250	232,250	232,250	232,250	232,250
Food	3,235	3,235	3,235	3,235	3,235
Life Skills Training	37,550	37,550	37,550	37,550	37,550
Mental Health Services	10,000	10,000	10,000	10,000	10,000
Outpatient Health Services	35,000	35,000	35,000	35,000	35,000
Substance Abuse Treatment Services	4,000	4,000	4,000	4,000	4,000
Transportation	9,200	9,200	9,200	9,200	9,200
One (1) FTE Case Mngr. (dedicated)	104,000	107,120	110,334	113,644	117,053
One (1) FTE Housing Counselor (dedicated)	104,000	107,120	110,334	113,644	117,053
<b>Total Operating Expenses</b>	<b>856,235</b>	<b>871,985</b>	<b>888,208</b>	<b>904,917</b>	<b>922,127</b>
<b>Net Operating Income</b>	<b>0</b>	<b>4,770</b>	<b>2,413</b>	<b>-75</b>	<b>-2,697</b>

Annual Increase Income	3.0%
Annual Increase Exspenses	3.0%

**Total HOME/ARPA request over 5 years 1,104,300.25**