

Response To:

**Community Development Authority
of the
City of Madison**

Request for Qualifications:

***Homeless Supportive Housing
RFQ No: 8317-0-2013/MRW***



Submitted By:

Horizon Development Group, Inc. & Porterfield Consulting Group



Porterfield Consulting
MAKING AFFORDABLE HOUSING AFFORDABLE



November 8, 2013

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

RE: **Response to Homeless Supportive Housing**
RFQ NO, 8317-0-2013/MRW

Dear Ms. Erdman:

Thank you for the opportunity to submit our qualifications and proposal for the **Homeless Supportive Housing Project**. Horizon Development Group, Inc., along with Porterfield Consulting, LLC, proposes a partnership with the City of Madison CDA and a future service provider to develop, construct, own, and operate the proposed Homeless Supportive Housing community.

Our development team has the project experience and skill set required for all aspects of the proposed housing development. Project structuring, gap financing, entitlement, design, and construction are all strengths of our partnership that will benefit the project. Horizon's unique corporate platform includes development, construction, and management services which will allow for better oversight of all project functions. Furthermore, we have a successful history with obtaining WHEDA tax credits and are proud of our reputation in the marketplace. Lastly, with a vast network of local connections, our team is in the best position to provide supportive services to the project. Together, Horizon and Porterfield Consulting provide a comprehensive, owner-focused real estate development approach.

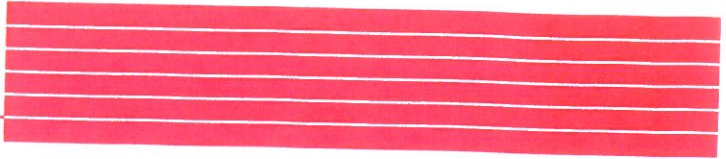
If our response requires additional information or further clarification, please do not hesitate to contact me. Our team is prepared and eager for the opportunity to work with the CDA on this exciting project. We look forward to your reply.

Sincerely,
Horizon Development Group, Inc.

A handwritten signature in black ink, appearing to read "Daniel D. Fitzgerald", is written over a horizontal line.

Daniel D. Fitzgerald
President

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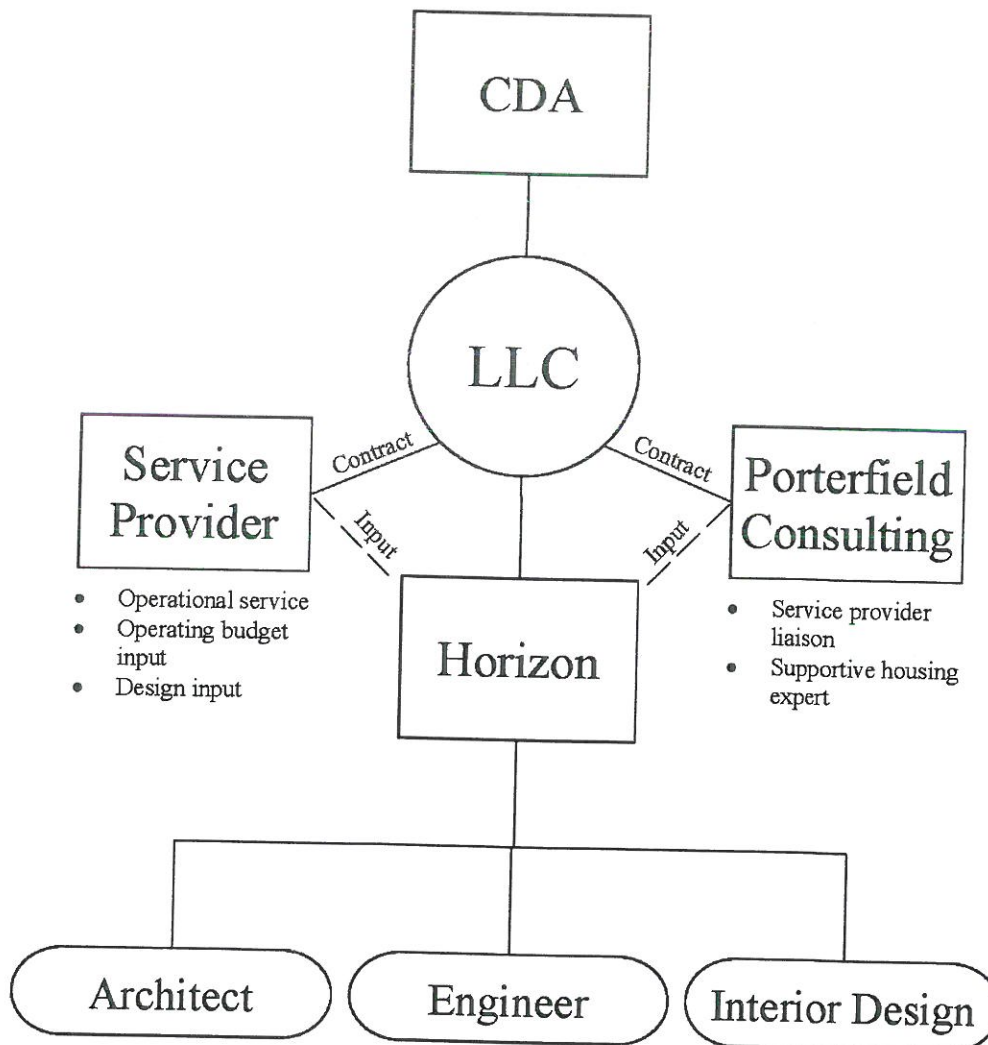
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1. Team Profile

a) Team structure, their roles and relevant experience, and single point of contact

The project team will be led by Horizon Development Group, Inc., who will provide development and construction services for the project. As the CDA's single point of contact, Horizon will coordinate project structure, financial feasibility, tax credit application, tax credit equity procurement, all aspects of project design and entitlement, soft funding, financial closing, and on-time, on-budget project delivery. The team will also consist of Porterfield Consulting, LLC as a consultant to the project. Porterfield Consulting specializes in providing development consulting services to projects benefitting low income families with disabilities and/or challenged with homelessness. Horizon and Porterfield Consulting are also expecting to partner with a service provider to be selected at a later date by the CDA. Below is a draft conceptual organizational chart that illustrates a potential team structure.



Single Point of Contact:

Dan Fitzgerald, President
Horizon Development Group, Inc.
5201 East Terrace Drive, Suite 300
Madison, WI 53718
Phone: (608) 354-0825
Email: d.fitzgerald@horizondbm.com

Team Member Contacts:

John Faust, CEO/CFO
Horizon Development Group, Inc.
5201 East Terrace Drive, Suite 300
Madison, WI 53718
Phone: (608) 354-0866
Email: j.faust@horizondbm.com

Scott Kwiecinski, Development Manager
Horizon Development Group, Inc.
5201 East Terrace Drive, Suite 300
Madison, WI 53718
Phone: (608) 354-0820
Email: s.kwiecinski@horizondbm.com

Dave Porterfield, Principal
Porterfield Consulting, LLC
4110 1/2 Maher Avenue
Madison, WI 53716
Phone: (608) 222-3123

Daniel D. Fitzgerald

President



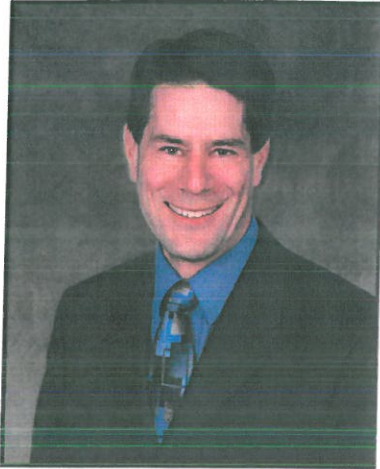
Daniel D. Fitzgerald is a company partner and President of the development and construction divisions. Dan has 19 years of experience in the real estate industry and has worked for Horizon since 1999. Dan also leads the business development efforts and has been involved in many of Horizon's residential, commercial and hospitality projects.

As President, Dan's responsibility is to help clients achieve their goals via Horizon's comprehensive design, development, and construction processes. Dan will ensure that the assigned team has the proper resources to exceed your expectations and deliver a high quality end product on-time and on-budget. Dan has been an active member of the Wisconsin Assisted Living Association since joining in 1999. He is a member of the Verona Area Chamber of Commerce Economic Development Committee and has served on the Big Box Task Force, appointed by the Mayor of the City of Verona. Dan is also active with Wisconsin Housing and Economic Development Authority (WHEDA), where he was appointed to serve on the Tax Credit Advisory committee. Dan also participates in the Economic Development Committee for Downtown Madison Inc. to provide feedback relating to the City of Madison Downtown Plan, Economic Plan, and Zoning Code Rewrite Advisory Committee. Dan was recently recognized by In Business magazine as one of Dane County's "Forty under Forty" for his professional and civic accomplishments.

Dan received his Bachelors of Business Administration degree from the University of Wisconsin – Madison with majors in Real Estate and Finance. He graduated from The Dale Carnegie Training Institute and is a licensed broker and registered member of the REALTORS® Association of South Central Wisconsin, Inc.

John K. Faust, CPA

Chief Executive Officer, Chief Financial Officer



John is the C.E.O. and C.F.O. of Horizon based in Madison, Wisconsin. John joined Horizon in November of 1995, and in September of 1996 became an owner/partner of Horizon.

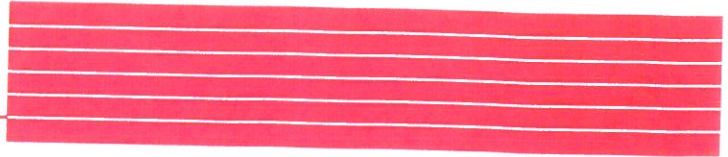
Since joining Horizon the company has developed more than 3,500 residential units and constructed in excess of \$550 million in real estate. Prior to joining Horizon, John was Treasurer of Heartland Properties, Inc. and its affiliate Capital Square Financial Corp. in Madison. Heartland Properties was a leader in the field of Section 42 affordable housing development, by developing more than \$200 million in new housing between 1989 and 1995. John is extremely passionate about providing older adult housing and has particular expertise in its development, financing and management.

Prior to joining Heartland Properties in 1991, John developed his real estate expertise by working as the manager of J&D of Madison, Ltd., a regional development property management firm specializing in Alzheimer care facilities and commercial motel development. J&D also provided management services for independently-owned motels, office buildings and multi-family residential properties.

John graduated from the University of Wisconsin-Madison with a Bachelor of Business Administration degree, immediately afterward he joined the firm of Smith & Gesteland CPAs as a manager in the General Business department with a focus on construction and manufacturing clients.

Scott Kwiecinski

Development Manager, Project Executive



As development manager and project executive for Horizon, Scott is responsible for development and entitlement work in the residential, commercial and resort divisions. His expertise includes feasibility, schedules, entitlement, proformas, section 42 financing, closing transactions, and business development. His ability to communicate, work through detailed entitlement processes, and coordinate layered financing makes him a valuable member of Horizon's team.

Scott is a licensed real estate salesperson and an active member of the Wisconsin Real Estate Alumni Association. He received his Masters of Business Administration- Real Estate & Urban Land Economics and Bachelor of Business Administration - Finance from the University of Wisconsin - Madison.

Low Income Housing Tax Credit Relevant Experience:

River Walk Place, Appleton, WI – 70-unit, four story senior residential building with underground parking.

Burr Oaks Senior Housing, Madison, WI – 50-unit, three story wood frame residential apartments on 1.4 acre development.

The Landing at Eagle Flats, Appleton, WI – 54-unit, four story workforce housing complex, geared toward working families and entry-level professionals.

Cedar Glen Senior Housing, Wauwatosa, WI – 80-unit, three story wood frame residential building with underground parking.

Woodfield Village II Senior Housing, Howard, WI – 49-unit, three story wood frame residential building with underground parking.

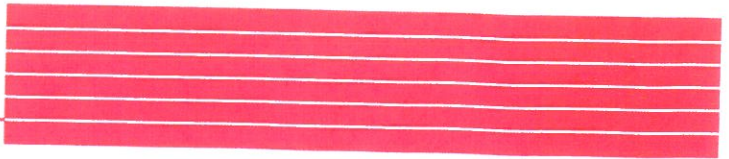
Hill Crest Senior Housing, Greenfield, WI – 41-unit, three story wood frame residential building with underground parking.

Alta Mira II Senior Housing, Menomonee Falls, WI – 57-unit, three story wood frame residential building with underground parking.

Applewood III, Dubuque, IA – 91-unit, two story wood frame, one and two bedroom apartment homes for those 55 and better.

David C. Porterfield

Owner, Porterfield Consulting, LLC



David has over 30 years experience with providing technical assistance to state and local government agencies and nonprofits regarding policy and program development in the affordable housing, community and economic development areas.

David's work focuses on creating affordable housing opportunities designed to integrate low and moderate income households and special needs populations into mixed income and mixed use development projects. He has experience in project conceptualization, market analysis, site identification, and negotiation of agreements with development partners. David is also experienced in obtaining required governmental approvals and entitlements, securing project financing, providing construction and project management and overseeing marketing and property management.

Nationally known as a technical consultant in the area of expanding housing opportunities for people with disabilities, David's work includes training, policy development and the establishment of comprehensive housing and services' partnerships to assist and include people with developmental and physical disabilities, mental illness as well as families and individuals who have experienced homelessness.

Relevant Experience:

Affordable Housing Development

Movin' Out Joint Ventures

YWCA Madison, WI

The Uplands, Sun Prairie, WI

Coachyard Square Condominiums, Madison, WI

Community and Economic Development

Operation Fresh Start

Wisconsin Supported Housing Partnership

Technical Assistance and Consulting

Road Home Program

Milwaukee County Homeless Assistance Programs and Safe Haven

Dane County, Wisconsin Development Fund

2. Experience

a) Obtaining Section 42 Tax Credits

Horizon is one of the most experienced developers and builders of affordable housing tax credit projects in the state. Our company has developed and/or constructed 68 affordable housing tax credit communities totaling over 3,200 units and remains very active in the program. Horizon's principals participate regularly in WHEDA board meetings and are part of WHEDA advisory councils. Our performance track record is outstanding with WHEDA and our company consistently earns top point scoring in the application process.

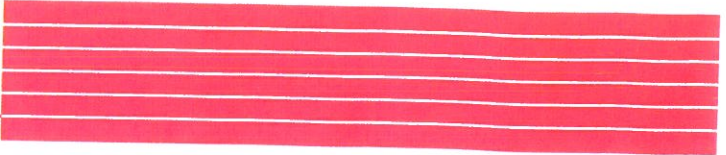
Horizon and Porterfield Consulting are experienced in analyzing the application process and recommending best strategies to maximize both scoring and project performance/feasibility. We have detailed knowledge of each scoring category and, in such a competitive allocation environment, know the importance of each point awarded. Our experience tells us that extensive documentation, proactive communication, practical modeling, and aggressive point scoring strategies all help create a successful application. With this, a great site, and Horizon's scoring ability as co-developer, the CDA's Homeless Supportive Housing project will be a very attractive development application in WHEDA's 2014 cycle.

Our experience and exemplary reputation with WHEDA projects has also helped in sourcing reliable, competitive financing in debt and equity markets. Our team is fortunate to have a variety of financiers ready, willing and able to step in and provide attractive deal terms that other developers may not have access to. Horizon is thankful to have performed so well in the past and is eager to introduce this project to the lending and investment community for consideration.

b) Participating in Public/Private Joint Ventures

Horizon has in-depth experience in working on projects that benefit from public/private joint ventures. Below and included in the appendix are examples of three recent projects where Horizon worked closely with a public entity to achieve redevelopment goals. We are comfortable assuming any role as appropriate, and are confident that we can work together, learn from each other, share innovative ideas, and use our collective capabilities to best serve the project. More globally, Horizon and Porterfield Consulting are experienced in working with public and private funding sources including Low Income Housing Tax Credits, taxable or tax-exempt bonds, Community Development Block Grant (CDBG) funds, HOME funds, tax increment financing, Affordable Housing Program (AHP) funds, HUD Section 811, HUD Continuum of Care, State and Federal Medicaid and other private financing vehicles.

- Burr Oaks - Madison, WI
 - 50 units, senior tax credit. City of Madison contributed land assemblage costs and CDA contributed 30 project-based vouchers to achieve a high quality, affordable apartment community.
- Riverwalk Place - Appleton, WI
 - 70 units, senior tax credit. Replaced obsolete housing facility with new construction in redevelopment area. Moved existing HAP contract in partnership with the Appleton Housing Authority.
- Uptown Commons - Chilton, WI
 - 40 units, senior tax credit. Partnered with the City of Chilton to redevelop blighted Uptown district. City funds, tax incremental finance, and HOME funds assisted in project feasibility.



c) Developing Low Income Multifamily Housing

Horizon has over 20 years of experience in developing and/or building affordable housing using Low Income Housing Tax Credits. Our first WHEDA project was completed in 1992 and since we have completed 68 projects totaling over 3,200 units. We have a distinct reputation for success amongst WHEDA and the financing community.

d) Developing Permanent Supportive Housing

Dave Porterfield, principal of Porterfield Consulting LLC has nearly 25 years of experience with developing supportive housing and establishing supportive housing programs and community systems. Beginning with the Department of Housing and Urban Development's (HUD) creation of a system for providing supportive housing and services in the early 1990's called the Continuum of Care (COC), Dave has had ongoing involvement with several communities in Wisconsin to initially establish their local COC and then assisting them to create programs and housing projects to meet the needs identified by those efforts. During that time, he has been involved with the creation of projects and programs that have resulted in over 2,000 units of supportive housing state-wide in Wisconsin.

Working under contract with Milwaukee County Department of Human Services, Dave designed a supportive housing program and secured a long-term commitment of HUD funding to create over 100 units of scattered-site and project-based housing units. These units have been supported with Shelter+ Care funding of approximately \$1,500,000 per year in rent assistance plus a commitment of supportive case management provided by Milwaukee County. These resources leveraged significant additional financing used to develop several hundred units of housing for homeless people with various disabilities.

The State of Wisconsin and Dane County contracted with Mr. Porterfield to carry out the initial feasibility and then create two non-profit agencies, Movin' Out, Inc. and Housing Initiatives, in the 1990's. Housing Initiatives develops, owns, and operates scattered-site housing for homeless individuals with mental illness in Dane County. Movin' Out, Inc. provides a range of housing services including comprehensive housing counseling, administering down payment and housing rehab programs, housing development, and property management on a state-wide basis.

In 2008-2010, Porterfield Consulting provided housing development consulting services to the YWCA of Madison assisting them to carry out a \$16M historic renovation of their headquarters building on the capital square in Madison. Mr. Porterfield was responsible for the selection of the development team, securing and closing on all required financing including Section 42 and historic tax credits, debt, HOME, AHP and negotiation with the Madison CDA regarding the continued use of project based section 8 vouchers. The project required an in-depth understanding of both the

housing finance and development process as well as the supportive services programs required to successfully operate the project. In many ways the project the CDA is proposing is very similar to the YWCA's project.

Through these and many other projects with similar requirements, Dave has gained the necessary experience with the full range of funding and financing programs needed for both housing and services to be able to ensure the resulting project will be successful over the long-term.

e) Partnering with social service providers

Horizon and Dave Porterfield have both established long-term working relationships with a wide network of local collaborators in Madison, Dane County and throughout Wisconsin. During the past three years they have been working together actively to advance several supportive housing projects and very recently closed on one such project in Watertown, Wisconsin. This recent experience has helped us to create a strong working relationship among our team members.

We know this project will require planning the real estate development process around the goal of providing housing to tenants with various special needs and very low incomes. This in-turn requires close coordination from the beginning with a range of service providers who will be responsible for identifying and supporting the future tenants. With this established working partnership our team is confident we possess the necessary skills and capacity to deliver the best project possible for this effort.

Mr. Porterfield has over 25 years of experience working with the local human service system, the Continuum of Care providers, real estate professionals, funding sources and units of governments here in Madison and Dane County. He can draw on these relationships and experience to assist in planning a project that will fit our community.

Our team believes it is very important that the creation of the new housing envisioned by the City be planned and developed to fit into and complement the existing Continuum of Care system in our community. We have the required experience and relationships needed to accomplish this. We understand that the ongoing support system, which is essential for the success of the project, has to be supported by and within the existing programs here in Dane County and Madison. Due to the very low incomes and high support needs by the tenants this project is intended to serve, projects such as these must rely on outside operating subsidies. While the City of Madison may be able to provide operating assistance with housing resources such as project based vouchers, those alone often are not adequate to meet the ongoing operating costs of the project. Our team will work with the CDA and available resources locally to create a project model that "self-sustains" and eliminates projected operating shortfalls. This plan will relieve the City of Madison from future operating subsidy requests as funding mechanisms for this, we understand, are limited. Horizon and

[REDACTED]

Porterfield Consulting urge the CDA to select a local development team such as ourselves. Our ability to partner with local service providers and optimize the operating structure of the project is unmatched compared to regional or national teams.

f) Developing multifamily housing that has received architectural awards or green building certification

As a developer and design/build general contractor of affordable housing, Horizon has taken the opportunity to use green building strategies that significantly reduce the impact on water quality, air pollution, global warming and the depletion of natural resources – while simultaneously lowering operating costs and maintenance needs. We have experience in a number of building rating systems, including LEED, Green Communities and Energy Star. Our team works regularly with Focus on Energy, the state utilities' energy efficiency and renewable resource program, and their design assist and prescribed energy assistance models. We are also working on a 108-unit apartment community in Denver, CO where Horizon's design involvement with the local energy program (Xcel) is resulting in a \$58,000 benefit to the capital budget. This does not take into account the operational efficiencies that the property, and residents, will enjoy going forward. This and so many other examples are important to highlight as energy conscious design decisions, and the right partner, can provide tangible benefit to a new construction apartment community.

In order to demonstrate our in-depth experience with green building initiatives for multifamily housing, a case study on Horizon's sustainable efforts at The Landing at Eagle Flats, a section 42 multifamily rental housing development in Appleton is provided in the appendix. Please see the attachment if you would like to read more.

3. References

a) List three clients for which you have completed similar projects

Mr. Jackson Fonder, President and CEO

Catholic Charities, Diocese of Madison

P.O. Box 46550

Madison, WI 53744-6550

Phone: (608) 821-3100

Email: jfonder@ccmadison.org

Ms. Debra Dillenberg, Executive Director

Appleton Housing Authority

925 W. Northland Ave.

Appleton, WI 54915

Phone: (920) 739-6811 x104

Email: debra.dillenberg@appletonhousing.org

Ms. Lu Ann Quella, CFO

YWCA Madison

101 East Mifflin Street, Suite 100

Madison, WI 53703

Phone: (608) 257-1436

4. Financial Information

a) Written statement of willingness and ability to provide construction, tax credit, and operating guarantees

Horizon and Porterfield Consulting discussed the project structure and agree that several options are available to the CDA in terms of project ownership and guarantee risk. Horizon is willing and able to provide the construction and tax credit guarantees for the project. We are proposing that all lease-up/operating guarantees be provided by the CDA or service provider. Tax credit equity terms may vary based on financial strength, so it may be in the project's best interest for the CDA to consider taking on this guarantee role. Dave Porterfield recently met with Steve Schooler from Porchlight, Inc. to discuss merits of teaming together. Steve indicated that Porchlight, if selected as a partner, may also be willing to step into the guarantor role for operations. With different options on the table, it would be prudent to have a team discussion on all guarantees and the implications for risk, development fee split and financial feasibility.

Please note that Horizon and Porterfield Consulting will be happy to partner with any service provider selected by the CDA. Our initial discussions led us to Porchlight, Inc. who would be a very fitting and capable partner on the project. Our contact with them, however, does not preclude us from teaming with another entity as later determined by the CDA. Please see the attached letter of support from Porchlight, Inc. endorsing our team.

b) Availability of firm's financial statements

Horizon's financial statements are available for review upon request.

c) Provide financial/bank references

Doug Horstmann, President & CEO

Dubuque Bank & Trust

1398 Central Avenue

Dubuque, IA 52001

Phone: (563) 589-2104

Email: dhorstmann@dubuquebank.com

Karyn Knaak, Vice President

US Bank

1 S. Pinckney St.

Madison, WI 53703

Phone: (608) 252-4202

Email: karyn.knaak@usbank.com

Mike Weber, Senior Vice President

Wisconsin Bank & Trust

8240 Mineral Point Rd

Madison, WI 53719

Phone: (608) 203-1212

Email:

mweber@wisconsinbankandtrust.com



November 4, 2013

Ms. Natalie Erdman, Executive Director
Community Development Authority
Room 312, Madison Municipal Building
215 Martin Luther King, Jr. Boulevard
Madison, Wisconsin, 53703

PORCHLIGHT, INC.

306 N. BROOKS STREET

MADISON, WI 53715

608.257.2534

FAX 608.257.2507

Dear Ms. Erdman,

On behalf of Porchlight, I write this letter regarding the proposal being submitted by the team of Porterfield Consulting, LLC and Horizon Design, Build, Manage in response to CDA's Request for Qualifications: Homeless Supportive Housing. I have met with Dave Porterfield and based on our discussions believe that Porchlight would be able to successfully integrate its services and management into the project planning process carried out by this team if our agency were to be selected to provide the services and management for this project.

I strongly believe that a local development team familiar with our community's service delivery system and the local real estate development and construction processes will provide the development best suited to the needs of those the project is intended to serve and the the required collaboration with the continuum of care for homeless services in Madison and Dane County. A local development team provides greater assurance that the resources utilized toward this project will remain in the area and allows for greater local control over the entire project.

When the opportunity arises, Porchlight anticipates submitting a proposal to provide comprehensive supportive and management services for the future residents of new facility. We will work with whoever is selected to develop the facility. We do believe a local development team, such as the one that Porterfield Consulting, LLC proposes, can provide a high quality project that will move us forward to the goals we all hope to achieve with this project.

Very truly yours,

A handwritten signature in black ink, appearing to read "Steven J. Schooler".

Steven J. Schooler
Executive Director
Porchlight, Inc.

"Solutions to Homelessness"





madison

101 East Mifflin Street | Suite 100
Madison, Wisconsin 53703
(608) 257-1436 | Fax (608) 257-1439
www.ywcamadison.org

November 5, 2013

Natalie Erdman, Executive Director
Community Development Authority
Room 312, Madison Municipal Building
215 Martin Luther King, Jr. Boulevard
Madison, Wisconsin, 53703

Dear Natalie,

I am writing this letter in support for David Porterfield of Porterfield Consulting LLC to be a member of the development team for the City of Madison project to create additional housing for homeless individuals. The YWCA Madison is hoping this project does not replace or duplicate services that we currently do for the homeless and if that is the intent of the Community Development Authority then I think Dave would be the right man to help with such a project in Madison.

As you know we remodeled our twelve story building in 2009 and 2010 with the assistance of historical tax credits, WHEDA funding and fundraising. We hired Dave in the fall of 2008 as our development consultant. He was instrumental as our liaison with our accountant and lawyers in the early stages of the project as he developed budgets and operating proformas. He assisted in our preparing the Affordable Housing Tax Credits application to WHEDA, an application to the Federal Home loan Bank and an application to the City of Madison for HOME funds. These applications were all successful. He also assisted in the search for securing an equity investor which was also successful. Our total project budget exceeded \$16 million and he helped guide us throughout this project and was a key member our construction project team.

We had a successful project and it helped to have David as one of our team members in the very beginning of the project.

Sincerely,

Lu Ann F Quella, CPA
CFO





Movin' Out

600 Williamson Street, L-1
Madison, WI 53703-3588

608/251-4446
608/819-0623 FAX

info@movin-out.org
www.movin-out.org

Housing ideas for people with disabilities.

November 5, 2013

Ms. Natalie Erdman, Executive Director
Community Development Authority
Room 312, Madison Municipal Building
215 Martin Luther King, Jr. Boulevard
Madison, Wisconsin, 53703

Re: Reference for Porterfield Consulting

Dear Natalie:

Dave Porterfield has a unique and specialized qualification: he is an expert at representing mission-focused housing developers to plan, develop, and operate safe, decent, affordable housing that emphasizes successful tenancy for all and enhances inclusion of people marginalized by their low income, disability, or social stigma.

My most direct knowledge of Dave's expertise is his work as Movin' Out's real estate developer. In that role he has exercised imagination and mastery of every element of development. His success has yielded 176 households that include tenants with disabilities who occupy safe and affordable homes integrated into ordinary neighborhoods.

In addition, Dave Porterfield has a collegial and collaborative style of working that is effective in tying together the many strands of any successful development team.

I am available to provide you with additional information, if needed.

Sincerely,

Howard Mandeville
Executive Director

SENIOR HOUSING

Burr Oaks Senior Apartments

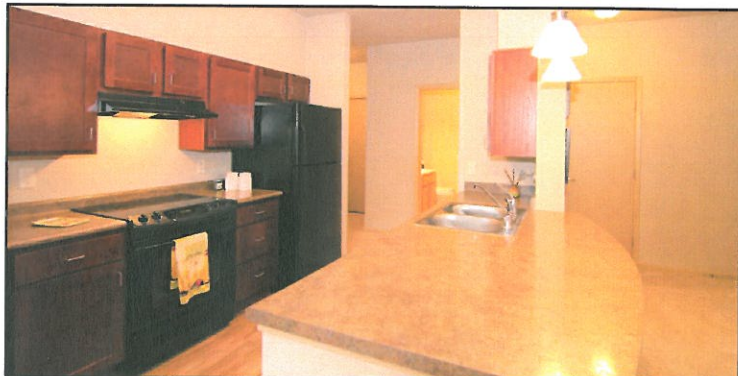
2417 Cypress Way
Madison, WI 53713

50 Residential Apartments
1.4 Acre Development

The Burr Oaks Senior Apartments revitalized a blighted area in a south side neighborhood of Madison. The goal was to replace the existing substandard apartments with high quality, affordable housing for seniors. As the developer, design/build general contractor and property manager, Horizon was able to successfully lead a complex team with many stakeholders through a lengthy entitlement process and seamlessly move into the construction phase. This integrated "one stop shop" approach allowed Horizon Construction Group to guarantee construction completion, fast tracked to hit leasing season in 7.5 months, and contract amount. Construction included all exterior components, interior build out and a green roof. Horizon was able to find a number of buyout savings without a sacrifice in quality, totalling \$170,000. These funds went to added upgrades without an additional cost to the client.

The project was completed in July of 2011 and was fully leased in four months. In total, WHEDA awarded the project \$7 million in affordable housing tax credits due to Burr Oaks major improvement in the quality of life for seniors and the continuance of the south side neighborhood renaissance. Additional financing included tax credits, HOME funds and First Mortgage.

Role – Developer, Design/Build General Contractor, Property Manager



5201 East Terrace Drive, Suite 300 • Madison, Wisconsin 53718
(608) 354-0900 • www.horizondbm.com

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MULTIFAMILY HOUSING

The Landing & Riverwalk Apartments

500 E. Eagle Flats Parkway
Appleton, WI 54915

54 Multifamily Residential Apartments
70 Senior Residential Apartments
Riverfront Development

Client: Appleton Housing Authority
Contract Value: \$11 M
Architect: Knothe & Bruce Architects

The project revitalized the former Riverside Paper Mill Site, an obsolete and underutilized area, located along the waterfront in downtown Appleton. The reopening of the Fox River locks system has created a new opportunity for sustainable development, and the community has a new appreciation for the wildlife and recreational opportunities in the heart of the city. The project meets the NAHB standards for Green Communities and for Green Built Homes.

The site itself presented numerous challenges. Environmental concerns associated with being an industrial site for well over a century presented many challenges. Horizon worked closely with the City of Appleton and the WDNR to devise a method of demolition and construction that were acceptable to the State.

To maintain the industrial heritage and to provide a sustainable solution for building materials, The Landing incorporated over 640 tons of recycled material that was generated during the demolition process. Utilizing the recycled material on site greatly reduced both the demolition and the construction process, making the project much more affordable.

The solar hot water integrated into the domestic hot water and space heating will reduce operating and maintenance costs. As the residents pay for their own heat in this project, this savings will be passed on to the residents.

The project has received over \$30,000 in energy rebates through Wisconsin's Focus on Energy Program.



5201 East Terrace Drive, Suite 300 • Madison, Wisconsin 53718
(608) 354-0900 • www.horizondbm.com

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The Landing at Eagle Flats Sustainability Case Study



Background

Horizon Design Build Manage is currently developing and constructing The Landing at Eagle Flats, a Section 42 multifamily housing project in downtown Appleton, Wisconsin that will be workforce housing with 54 units. The development will be among the most energy-efficient multi-family residential buildings in the nation, and one of only four in Wisconsin, upon completion of the EPA's Energy Star pilot program. The Energy Star program focuses specifically on improving energy performance in buildings. In 2011, the Energy Star program expanded to include multi-family, high-rise residential buildings with four or more stories.

With the projects close proximity to the Fox River, Horizon worked closely with the Department of Natural Resources and local natural resource advocacy groups to ensure the river was not affected by construction or the long-term occupancy of the site

Brownfield Revitalization

Located on the site of a former paper mill, the Eagle Flats master plan, of which The Landing is part, is a new development with a long-term, sustainable vision. As a **HUD-assisted project**, The Landing at Eagle Flats was required to adhere to HUD's site contamination policy, as well as a voluntary cleanup plan by the development team. Soil remediation and containment were some of the first challenges in preparing the site for construction. A geotextile clay liner was installed over the entirety of the site and clean, local soil was back-filled so native plants and grasses can be planted on site. Innovative monitoring systems were implemented to ensure the safety of the residents upon occupancy and into the future.

Energy Efficient Design & Implementation


To qualify for the Energy Star certification, The Landing had to meet energy-efficiency guidelines established by the EPA, and be at least 15% more energy efficient than standards set by the American Society of Heating, and Air Conditioning Engineers. The process from design to performance with ENERGY STAR has been a long-term commitment amongst the development team, as the project requires post-occupancy reviews to maintain its certification. The development and design team used energy metrics to make informed design decisions. Wisconsin Focus on Energy is helping to administer the Energy Star pilot program and will continue to inspect and monitor The Landing upon completion to evaluate energy savings. These energy savings will be passed on to the residents.

Energy-efficient features included:

- Effective insulation systems – a sprayfoam sealing at exterior walls with batt insulation increased the overall R-value.
- BIM modeling was used by systems engineers to properly size heating and cooling equipment
- Collaboration between architects and engineers allowed for tight construction and ventilation ducts
- In-floor radiant heating was chosen rather than forced air
- Energy Star qualified lighting and appliances
- High-performance windows and patio/balcony doors
- Low flow /water sense toilets, shower heads and fixtures were installed in all kitchens and bathrooms
- Rooftop solar panels will provide energy to heat all of the hot water in the building.

Sustainable Construction Practices

Prior to construction of The Landing Apartments, the existing paper mill buildings were slated for demolition. Over 20 paper mill buildings and smokestacks structures made of concrete and brick had to be removed. Horizon Construction demolished the structures, ground the materials on site and then used in other areas of construction, such as fill for undercut, backfill and an aggregate base course under paved surfaces, and also to raise the existing overall site grade.



MAYOR'S 2008 DESIGN AWARD

TEUTONIA GARDENS
2711 North Teutonia Avenue

This new development stepped right up to sidewalk and, with a nod to the surrounding structures, respectfully joins the neighborhood.



Tom Barrett
MAYOR, CITY OF MILWAUKEE

MIXED-USE RESIDENTIAL

Teutonia Garden Apartments

2701 North Teutonia Avenue
Milwaukee, WI 53206

Teutonia Gardens is an innovative affordable housing development in Milwaukee's urban center which incorporates a thriving neighborhood barbershop which existed on the same site for forty years plus and an award winning urban garden with roof fed cistern. This Wisconsin Environmental Initiative "Green Built" certified project is the first in Wisconsin to offer the opportunity for residents to learn and earn from an urban garden.

24 Unit Apartment Building Featuring 5,400 sf
First Floor Retail Space and Urban Garden

Role – Developer, Design/Build General
Contractor



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SENIOR HOUSING

Frost Woods

Frost Woods Road
Monona, Wisconsin

Conveniently located at the junction of Frost Woods Road and Monona Drive, Frost Woods consists of two apartment buildings and a 16,000 square foot retail center, Frost Woods Commons. Frost Woods Senior I has 67 income-eligible apartment homes while Frost Woods II has 51 market-rate apartment homes.

Two Buildings with 118 Apartments and
one retail building

Role – Developer, Design/Build General
Contractor, Property Management



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Blueprint for Success



The Landing at Eagle Flats is the first project in a large redevelopment on the site of the former Kerwin Paper in Appleton (DNR Photo).

Eagle Flats – Appleton

The shadow of the paper industry hangs heavy over parts of Wisconsin's Fox River Valley. The unique geography of the region – the river drops 168 feet between the cities of Neenah and Green Bay – made it an ideal location to power the many paper mills that sprouted up along the river banks. But as papermaking operations have scaled back in the Fox Valley, many communities worked hand-in-hand with the DNR to seek out new opportunities for these valuable properties.

A new success story is in the making at the site of the former Kerwin Paper in Appleton. This historically industrial area known as "the Flats", is located downtown, below the river bluffs. The natural beauty of the setting inspired the cooperation and effort that resulted in the Eagle Flats Redevelopment Project.

Kerwin Paper and its neighboring businesses faced serious environmental contamination concerns in 1999, when chlorinated solvents were discovered during the removal of an underground storage tank. Investigations following the initial discovery revealed the presence of significant chlorinated solvents in groundwater, including dense non-aqueous phase liquid (DNAPL). At least two separate locations on site had contamination sources, which included tetrachloroethylene (PCE) and trichloroethylene (TCE), which were historically used in the process to remove wax from the paper.

The company initiated an interim action in 2001 to control the main source area by installing a groundwater collection and treatment system, while their consultants worked to define the extent of contamination. By 2004, the groundwater contamination was found to extend more than 600 feet below ground surface and more than a mile down-gradient in fractured limestone dolomite and the sandstone bedrock.

Kerwin Paper stopped on-site operations in July 2005, and the 140,000 square foot building remained mostly vacant and underutilized afterwards. While the property sat empty, remediation work continued. The groundwater pump-and-treat was targeting an area of unconsolidated fill material, sandy soils and shallow bedrock as an interim measure. Still, a more aggressive approach was needed to fully address the contamination, and the Kerwin Paper building itself created a barrier to the cleanup.

The consultant performed a remedial action options evaluation and submitted a remedial action plan for DNR review. DNR approved the selected remedy - injection of a carbon amendment solution under pressure, specifically emulsified oil substrate plus vitamin B12, commercially known as EOS®. EOS was selected for its low viscosity, widely effective radius, easy application, and support of reductive dechlorination.

In addition, application of the product was projected to continue to enhance breakdown of the contaminants over a three to five year period after injection.

The injection into the groundwater in the unconsolidated fill material and sandy soils took place at two on-site locations in June 2006 via 39 injection points. The interim groundwater pump-and-treat system was shut off in September 2006 to allow for the in-situ treatment. After seeing a positive response, the DNR granted approval to perform another injection of EOS, this time into three locations of shallow fractured dolomite bedrock. Evaluation of post-injection groundwater monitoring data is currently underway to determine if additional injection or another remedial option is necessary.

The beauty of the downtown riverfront property, along with the projected success of the remediation, likely led to renewed interest in redeveloping the property. The city of Appleton created a master plan to revitalize the Flats, and held multiple meetings with stakeholders throughout the redevelopment process. Eventually, the property was purchased by Eagle Flats, LLC, who brought in investors and a developer to make over this once-industrial neighborhood. Once Eagle Flats, LLC purchased the property and began working with the developer, they identified green and sustainable remediation techniques to further clean-

up the property. Demolition of the former paper mill included on-site crushing and reuse of the clean crushed concrete as fill for the redevelopment. Removal of the building opened up access to additional source-area contaminated soils. In cooperation with the redevelopment schedule, the environmental consultant chose in-situ treatment of hazardous waste soils (with a soil vapor extraction (SVE) system, approved by the DNR) to minimize the amount of hazardous waste generated. Highly-impacted soils were then treated ex-situ to again minimize the amount of hazardous waste prior to proper disposal.

The DNR issued a Conditional Low Hazard Grant of Exemption for on-site reuse of lead-bearing painted concrete & masonry and minimally impacted soils beneath planned structures and asphalt drives to allow for grading necessary for the redevelopment. Under direction from the Department, the developer designed a passive sub-slab ventilation system to proactively address any residual chlorinated vapors that may be present after redevelopment. The system was designed to be able to convert to an active sub-slab ventilation system, if necessary to protect future residents.

Construction recently wrapped up on the Kerwin Paper redevelopment, and residents began moving into The Landing at Eagle Flats this February. Directly next to the 54-unit housing complex is a 70-unit senior housing complex called Riverwalk Place, scheduled to be complete by the end of summer 2012.

The Landing may be the first multi-family high-rise building in Wisconsin to achieve the Energy Star certification. To earn the Energy Star certification, a new multi-family high-rise must meet strict guidelines for energy efficiency as set by the U.S.EPA and Department of Energy. They must be at least 15% more energy efficient than multi-family high-rise buildings built to the American Society of Heating, Refrigerating and Air-Conditioning Engineers Standards.

Along with the residential housing, the property owner and developer are working with various community groups to bring in a mix of commercial enterprises such as restaurants, office space, and retail businesses.

The early and continuous communication amongst all stakeholders with the city, the DNR and private entities has been a driving force in pulling this project together. Another positive factor was the ability of the responsible party, CBC Coating, Inc., to stay on top of the remediation activities and work closely with the DNR in reassessing alternative remedial applications as the site progressed from vacant structure, to demolition, to redevelopment. The resulting project may serve as a model for other Wisconsin communities looking to create new opportunities out of their storied industrial history.

RR Program's Role

The RR Program's strong relationships with the owner, developer, consultants, responsible party and the city helped make this project a success. Here's some the ways the DNR provided help:

- Pre-development meetings
- Issuance of a Development at Historic Fill Site or Licensed Landfill Exemption to allow above-grade demolition of the building (historic fill present on site),
- Issuance of a Development at Historic Fill Site or Licensed Landfill Exemption to allow demolition of at and below-grade structures and construction,
- Issuance of a Conditional Low Hazard Grant of Exemption for reuse of lead-bearing painted concrete & masonry and contaminated soil as fill
- Approval of Remedial Action Plans
- Approval of the Soil Management Plan
- Hazardous Waste Determination
- Chapter 30 permit for activity adjacent to navigable waters
- Storm water permit
- Lease Liability Clarification letter issued for "The Landing"
- Lease Liability Clarification letter issued for "Riverwalk Place"



DNR project manager for Eagle Flats, Jennifer Borski, highlighted the environmental cleanup during a tour of the redevelopment project for local students (DNR photo).





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GREEN BUSINESS – Saving energy along the Fox River – Appleton's Eagle Flats buildings are pilot projects for Energy Star

Posted by [Rich Redman](#) on 12/05/11 • Categorized as [Green Business](#)

When the first residents move into The Landing at Eagle Flats along the Fox River near downtown Appleton this coming February, they'll have the privilege of living in one of the most energy-efficient multi-family residential buildings in the nation.

That's because the developers have enrolled both The Landing and River Walk Place, a companion building scheduled for summer completion, in the U. S. Environmental Protection Agency's Energy Star pilot program for multi-family high-rise buildings.

These two buildings are the first of several projects planned for the space south of the Fox River and west of Lawe Street that was the site of the former Riverside Paper Mill. Partners in the development include Randy Stadtmueller, representing Eagle Flats LLC, and Horizon Development Group of Madison.

"Most people identify Energy Star with energy-efficient appliances, but the certification is gaining a lot of ground in the construction industry," says John Thode, managing partner with Horizon Development Group. "Sustainability begins with energy efficiency. Horizon Development Group and Eagle Flats LLC are working hard to make sure the new buildings are green and that the energy savings are passed down to our residents."

Energy Star started its construction program five years ago and expanded it to include multi-family, high-rise residential buildings with four or more stories in 2011.

According to Torrance Kramer, energy advisor with Franklin Energy Services for both Energy Star and Focus on Energy, pilot projects are under way in New York, Oregon and Wisconsin.

"Wisconsin is the leader for the upper Midwest," says Kramer. "We'll provide feedback on cold-climate issues to help them tailor the full-blown program."

The two local buildings will be the third and fourth in Wisconsin to receive this designation.

Kramer's colleague, Sharon Gould, new construction program manager, is complimentary of the local developers' energy concerns. "With a multi-family unit, you have a split-meter issue. Since tenants are responsible for energy bills, the developer doesn't necessarily have the incentive to provide a super-energy-efficient building."

The Landing at Eagle Flats is a 54-unit workforce housing complex. "A building like this needs a lot of forethought. These are not big-budget buildings, so it was helpful to get all the people around the table to integrate the design wisely," says Gould.

Everything about the heating and air conditioning systems is Energy Star rated, according to Jim Peterson, project coordinator for the development.

River Walk Place, a 70-unit affordable senior housing community that is already under construction to the west of The Landing, will include the same energy conservation features. It is being developed by the Appleton Housing Authority, and will be the new home of the residents of Washington Place, a senior apartment building in Appleton facing costly repairs. It is scheduled to open next summer.

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Eagle Flats development in Appleton, Wis.



The Landing apartments revitalizing Appleton riverfront

Updated: Wednesday, 01 Feb 2012, 6:08 PM CST
Published : Wednesday, 01 Feb 2012, 1:56 PM CST

• Chad Doran, FOX 11 News

APPLETON - It's the new face of the Appleton riverfront. The Landing is a 54-unit income restricted apartment complex situated on the Fox River on the site of the former Riverside Paper Mill.



"This is actually a great site for us, this is a great site for in-fill housing, this is workforce and young professional housing," said project developer John Thode of Horizon Development Group.

Twenty-three-year-old Jim Meulendyke agrees.

"Being the first person to live in here, kind of a new community being opened here is what I was excited for as far as what they were trying to do around here, bringing in a whole new contingent of people," he said.

It's that kind of excitement the city of Appleton is hoping for with a project that's aiming to revitalize a large swath of land along the river downtown.

"We're thrilled, it's very exciting. This is an eight acre property that has been in industrial use for over 100 years and for the first time they are making it available for the public to enjoy," said Appleton Community Development deputy director Monica Klaeser.

The apartments are also close to downtown and the Fox River Trail. A \$16 million grant from the Wisconsin Housing and Economic Development Authority helped with demolition of the former mill. The money also helped develop the Landing and Riverwalk Place, a senior living complex next door.

In addition to the waterfront views, one of the things that make these apartments so unique is that they are some of the most energy efficient in the state. With radiant floor heating, solar powered water heaters, energy start appliances and lighting, this is only the third apartment building of its size in the state to qualify for energy star certification.

It all adds up to a pretty cool place to live for someone like West Ferguson and his fiancée, getting their first apartment together.

"We got a two bedroom, two bath and its \$602 a month which is right in our price range for what we want in the area we wanted, so we're in love with it," Ferguson said.

Meaning these apartments fill a need for affordable housing and fit the bill for sprucing up the namesake of the Fox Valley.

Appleton Waterfront Development

By [Eric Peterson](#)

CREATED FEB. 1, 2012

Appleton, WI - Riverfront revitalization is taking off in Appleton.

Old industrial sites are being demolished, and new developments are popping up all along the Fox River. One new apartment complex opened Wednesday, with every unit already rented.

The Appleton mayor says it began a few years back with the city came up with their riverfront master plan. He says back then, it was just a plan, but now, that plan has turned into a project.

While construction continues next door, The Landing at Eagle Flats ready for business.

"There's a building that is opening today. Families are moving in, it's opening, and it's full," said Appleton Mayor Tim Hanna.

54 apartments are sold out, and a second complex is opening soon. And just down river....

"There's activity on Riverheath, there's townhouses being built," said Hanna.

"Seven units going down here. There's room for quite a few more. We're also doing a restaurant, coffee shop, and a high rise going down here," said John Hofferber, of BerHoff Homes.

It's part of the city's riverfront master plan. New development along the river, could tie-in to the downtown. The mayor says the key is in the convention.

"That exhibition center just behind the Radisson Paper Valley, is going to provide us that opportunity," said Hanna.

Plans for an new expo-center are in-the-works.

"That's gonna be a natural connection, through Jones Park, and down into that whole riverfront area," said Hanna.

It's an area that has helped make Appleton what it is today, and could help shape what it might be, tomorrow.

"The flats were kind of falling apart for a while. It's looking like it's going to re-vitalize and bring a lot more people downtown. So I think it's a great thing," said Linda Fuerst, who works at Lawrence University.

Other plans for the city include renovations to Houdini Plaza, and an idea called light up the Fox. A winter light show, that could debut along the river, next winter.

Find this article at:

<http://www.nbc26.com/news/local/138527654.html>



News » First part of Eagle Flats development open

Feb. 1, 2012

The first piece of the Eagle Flats development, in the Appleton flats, is opening today.

The Landing at Eagle Flats, is a 54-unit affordable apartment complex near the Fox River. Karen Harkness is Appleton's community development director. She says there's a lot of interest in the new apartments.

Another piece of the Eagle Flats development is also under construction. The project that will create 70 apartments for the Appleton housing authority project should be finished by August.

Harkness says it's great to see a neighborhood popping up, where a vacant mill previously stood.