

**PORCHLIGHT, INC.'S REPONSE TO REQUEST FOR QUALIFICATIONS:
RFQ 8320-0-2013/MRW**

1) FIRM PROFILE

Please Note: The City of Madison has adopted a local preference purchasing policy that would grant a five percent scoring preference to local vendors. Proposers seeking to obtain local preference status must meet specific criteria and register online at:

<https://www.cityofmadison.com/business/localpurchasing/>

To qualify your company must be registered at time of proposal submission.

Porchlight is registered for this local preference.

- a) Provide your organizational structure, staff roles and their relevant experience, and a single point of contact, including name, phone number, and address.**

Organizational structure: see attached.

Staff roles:

Executive Director, Steven J. Schooler, graduated from the University of Michigan Law School in 1981, and practiced law in Madison for twenty years before deciding to change careers and become the Assistant Director for what was then Transitional Housing Inc. (now Porchlight) in 1999. He became the Executive Director in 2001 and has served in that capacity ever since. Transitional Housing merged with another local non-profit, Community Housing and Services, to become Porchlight in 2004. Mr. Schooler served on the Board of Directors for Transitional Housing from the early 1990s until 1999 when he joined the staff. During that time, he led several summer mission camps connecting volunteers to helping at the Drop-In Shelter and renovation and maintenance projects for buildings owned and operated by Transitional Housing.

In the summer of 2004, Mr. Schooler, with a scholarship awarded by the Harvard Business School Club of Wisconsin, attended an intensive seminar at the Harvard Business School, "Strategic Perspectives in Nonprofit Management". He has also received several awards, including the 2010 Perry Saito Award from the Wisconsin Conference of the United Methodist Church, the 2010 Non-Profit Executive of the Year – Sales & Marketing Executives, the 2009 Professional Fair Housing Award – Wisconsin Fair Housing Network, and the 2008 Community Asset Builder from Downtown Madison, Inc.

Mr. Schooler was previously active in the State Bar of Wisconsin and on the Board for Transitional Housing prior to 1999 and has been an active member of First United Methodist Church since 1981.

Director of Services, Karla Jameson, has worked for Porchlight for 22 years. She holds a Master of Social Work from the University of Wisconsin – Madison with a concentration in mental health. Karla supervises the Safe Haven program and the Porchlight housing case managers. Karla received the Unsung Heroine Award given out by NAMI in 2002. Ms.

Jameson will supervise the case managers of the 50-60 CDA units and be responsible for daily operation and reporting requirements.

Director of Finance, Daniel Barnes, has worked for Porchlight, Inc. for six years. He is a graduate of the University of Wisconsin – Platteville with a Bachelor of Science in Accountancy. Prior to working with Porchlight, Daniel worked in the public accounting sector performing audits and preparing corporate tax returns, mainly for regulated utilities in Wisconsin. Additionally, Daniel has assisted another Wisconsin non-profit in managing their financial records for the past three years.

Director of Housing, Dana Pellebon, has been in property management since June of 1995. In that time, she worked with HUD, HOME Funds, Section 42, and Rural Development units. She is a Certified Occupancy Specialist and a Housing Credit Certified Professional. She also authored the Second Chance program, which is administered by the YWCA. Second Chance is a housing program in Madison, WI that accepts education in lieu of credit or housing references. Dana has been with Porchlight since March of 2012.

Director of Operations, Brad Hinkfuss, has been working with Porchlight for 12 years. He currently works as the Director of Operations, overseeing property maintenance, new construction project management, emergency shelter operations, and information systems. He holds a Master's Degree in Community Development and has worked in construction project management in a wide variety of situations.

Case Manager(s), TBD, will provide case management services to the 50-60 men and women who live in the CDA apartments. They are responsible for developing Individual Service Plans (ISPs) for each tenant, and ensuring linkage, referral, and advocacy to community resources as well as assistance with employment and disability applications.

Single point of contact:

Steven J. Schooler, Executive Director
306 N Brooks St
Madison, WI 53715
(608) 257-2534 x 18
schooler@tds.net

2) EXPERIENCE

1. Providing case management services for chronically homeless adults:

As the largest non-profit provider of housing and related services to homeless persons in Dane County, Porchlight is uniquely qualified to operate CDA's 50-60 permanent housing units. Formed in January 2004 through the merger of two established non-profit housing providers, Porchlight has over 25 years of experience managing homeless assistance programs. Porchlight provides a continuum of services for homeless and low-income individuals and families, helping foster independence and self-sufficiency. While living on the streets or staying at the shelter, clients receive assistance with food, emergency assistance,

transportation, medical care, referrals to community resources, alcohol and substance abuse counseling, and housing and employment counseling. Once a client has a stable income, Porchlight is able to provide affordable transitional or permanent housing in conjunction with case management services.

Porchlight has been providing intensive case management in Madison and surrounding areas since 1987. Porchlight owns and operates 292 units of low-cost transitional and permanent housing, serving both single adults and families that have been homeless or have very low incomes. Of those units, 102 (87 SROs and 15 efficiencies) are located at Porchlight's administrative offices at 306 N. Brooks St. The Brooks Street facility has a commercial grade kitchen facility that provides five bag lunch meals to residents each week and is used by the Porchlight's Employment and Life Skills Training program (Porchlight Products), an employability training program for residents. All Brooks Street residents have access to a food pantry and supportive services. In 2012, Brooks Street housed 122 persons and provided 33,545 shelter nights. An additional 190 units of permanent and transitional housing are located at scattered sites throughout the City of Madison and Dane County. That includes 135 SRO/efficiency units, 20 one-bedroom units, and 30 family housing units, ranging in size from two to four bedrooms. All units have rents far below fair market rental rates for Dane County.

Case management services include assistance with money management and budgeting skills, nutrition counseling, housekeeping, and support in maintaining physical and mental health (including medication and appointments). Additional services include referrals to community agencies for vocational and employment skills, and connections with social and recreational opportunities.

Porchlight operates several programs that serve persons who are chronically homeless.

In 2007, Porchlight received a HUD grant to begin providing subsidized housing and supportive services to chronically homeless single individuals. Currently, Porchlight leases 13 housing units in the community and then subleases the units to single individuals who meet the HUD definition of chronically homeless. Porchlight provides intensive case management services to these individuals, many of whom are dually diagnosed. Since the onset of the grant, Porchlight has served 25 individuals, 15 of whom are still housed in the program. Of the 10 residents who moved out, 5 moved into permanent housing. This is an incredible success rate of 80% of formerly chronically homeless participants in maintaining long-term housing.

In 2006, Porchlight received a HUD grant to build, operate and provide support services to 16 homeless individuals with disabilities, many of whom are chronically homeless, in efficiency units located at 2718 Pheasant Ridge Trail. Porchlight provides intensive case management for tenants, including weekly home visits, medication monitoring as needed, connection to mainstream resources, and transportation to medical appointments. Since the onset of the grant, Porchlight has served 43 individuals, 16 of whom are still housed in the program. Of the 27 residents who moved out, 17 moved into permanent housing. Nearly 77% of residents have successfully maintained long-term housing.

In addition, Porchlight received a HUD grant to build 34 units of efficiency apartments and provide property management and supportive services at its facilities at 4002 – 4016 Nakoosa Trail. Four of the units are designated to serve chronically homeless persons and another 18

serve persons in the Partnership for Transitional Opportunities program (PTO). PTO participants are homeless individuals with substance abuse issues, and many have com-occurring mental illness. The PTO program addresses the core disabilities that are leading causes of chronic homelessness.

In addition to PTO, Porchlight has developed several programs that successfully address many of the causes of chronic homelessness. These programs include STABLE, Northport Group Home and Safe Haven. Porchlight is the owner, operator, and case management provider for all three programs.

STABLE (Skills Training and Barrier Limiting Education) is an 8-unit transitional, SRO program that provides housing and services to homeless women with severe and persistent mental illness. Porchlight provides intensive services to this very vulnerable population, offering weekly on-site case management, counseling, disability application assistance, money management, and transportation.

Northport Group Home is a transitional, community based residential facility that serves six homeless men with severe and persistent mental illness, many of whom are chronically homeless and have substance abuse issues, in a home-like setting. The six men have their own room and share a living room, bathrooms and kitchen with the other residents. In addition, two resident managers live on-site and a cook prepares an evening meal. The resident managers are able to provide daily medication monitoring, and a Porchlight case manager provides counseling, recreational activities, teaches daily living skills, makes referrals to community resources, and provides crisis support.

Porchlight's Safe Haven program began operating in 1996 to address the growing number of homeless individuals with mental health issues. Men and women with severe and persistent mental illness are often unconnected to the shelter system and necessary social services. Safe Haven serves as a portal of entry to the community service system and offers basic services, such as meals, laundry, showers, mail, and bus tickets. Safe Haven also partners with the University of Wisconsin to provide a Volunteer Psychiatric Clinic to assist clients without any other access to a professional services provider. The shelter is staffed 24 hours a day, seven days a week. It provides transitional shelter beds for 14 individuals and drop-in services for an additional 30 persons per day.

In the past five years, 59% of Safe Haven residents have moved from shelter into stable housing. This is a very impressive considering that the majority of guests suffering from serious and persistent mental illness are chronically homeless, unconnected to services, not on medications and do not have an income. Once a Safe Haven guest has moved into permanent housing, if he/she does not have a case manager, then Safe Haven's Follow-up Worker can provide supportive services for up to six months.

Supportive services participants will receive: type and scale

The following are supportive services currently provided by Porchlight that would be offered to CDA tenants if Porchlight is chosen as the operator / service provider for this project.

Case management will be provided to each resident in the program. The case manager will complete an assessment on each participant to determine his or her strengths and areas of need. This assessment will be completed within 30 days of the participant entering the program. The case manager will then determine the frequency and duration of participant meetings. The case manager will meet with all participants at least twice per month and more often as needed. An individualized service plan (ISP) will be developed based on information from the assessment. The case manager may assist participants with medication monitoring by utilizing verbal reminders, recommending individual dose packaging as needed, and monitoring behavior.

The ISP will be reviewed every six months and updated as goals are met or revised. The staff/client ratio will be approximately 1:20. Currently, the average caseload for Porchlight case management staff is approximately 1:25, but case management staff members have a mix of disabled and non-disabled clients on their caseload, with the non-disabled clients typically requiring less intensive services. A smaller caseload will afford the new case managers the ability to provide more flexible, mobile and individualized support services including more frequent in-home visits, quicker response times for crisis situations, and the ability to provide transportation more often for the participant.

Porchlight will utilize harm reduction techniques to work with the chronically homeless persons with substance abuse who may live in the units. Case managers will assist the residents in addressing negative behaviors or circumstances that may have contributed to their homelessness, including poor housekeeping, disruptive or criminal behavior, tickets and citations, and jail time. Goals for the residents will include creating and maintaining productive behavior patterns that promote successful tenancy and community living, and increase their individual self worth.

Location of supportive services

Porchlight will have an on-site office that will include space for case management and property management. This will allow staff the ability to meet the immediate needs of its tenants and to respond to any emergency situations or concerns in a timely manner. Tenants will also be able to pay their rent and make requests for maintenance on-site. In addition, Porchlight will have 24-hour staffing on-site. The case managers will work first shift on weekdays, and night managers will be on staff second, third, and weekend shifts to assist the residents and report any concerns or needs to case management staff. Staffing the facility 24 hours per day will greatly reduce police calls, neighbor disturbances, and health crises by providing immediate assistance and intervention as incidents occur.

The majority of case management meetings will take place with the resident in his or her apartment, which is ideal. This will allow the case manager to assess the resident, as well as monitor the condition of their apartment. As participants will likely be chronically homeless and have a disability such as mental illness, substance abuse, or physical limitations, the condition of their home may be a valuable indicator of how the client is doing. Other case management appointments may take place in the community in order to address other client needs. The case manager will have access to his or her own automobile and will be able to provide transportation as needed. They will also help clients access public transportation to promote independent living skills.

Connection of clients to mainstream resources

Part of the initial needs assessment will be a Mainstream Resources Checklist that includes Medicaid/Medicare, SSI, FoodShare, Workforce Development and Veterans health care programs. This assessment checklist will determine which programs the clients are eligible for and in which programs they are already enrolled. The case manager will assist the client in filling out the necessary paperwork and attending the necessary appointments for those programs for which the client is eligible. The case manager will then monitor the progress of a client's eventual acceptance or rejection from the program and assist in appeals as necessary. The client's application for and acceptance into the above listed programs will become part of the client's ISP and will be updated monthly.

Porchlight will utilize and receive referrals from all Madison area resources for its tenants, including centralized services such as Dane County Job Center, ADRC (Adult Disability Resource Center), Journey Mental Health Center, and the newly formed Coordinated Intake and Assessment.

Self-sufficiency development

Disabled residents who are unable to work and are not currently receiving Social Security Disability will apply. All qualified participants will also receive a referral to existing job training programs such as Porchlight's Employment and Life Skills Training program at Brooks Street and to the Division of Vocational Rehabilitation (DVR). Some participants may never be able to obtain substantial gainful employment, but with the sense of security created by permanent housing, many participants may be able to venture further emotionally and physically than ever before. Furthermore, participants will be taught necessary daily living skills such as money management, household management, proper nutrition, and cooking skills. Residents with mental health issues or substance abuse issues will be supported and referred to appropriate community resources. Residents will also be assisted in developing a support system in the community, including therapy, groups, and Narcotics Anonymous/Alcoholics Anonymous.

2. Providing or partnering with providers of supportive services for individuals with AODA, mental health, or physical disability issues:

One of Porchlight's strengths is its many long term, experienced employees. The population Porchlight serves is diverse in terms of gender, race, age, sexual orientation, education level, and disability. Porchlight's front line staff and managers reflect this diverse mix of gender, race, age, education level, disability and history of homelessness. Forms are available in Spanish at all program locations. Clients with low literacy skills have forms read to them by staff and verbally asked if they understand what has been read to them. Porchlight provides a continuum of care to the chronically homeless in Madison, from two outreach workers, two emergency shelters, a day resource center, and an eviction prevention fund program to over 300 units (including units rented in the community) of permanent and transitional housing for singles and families.

Porchlight as an agency has significant experience serving homeless individuals with severe and persistent mental illness and alcohol and drug addiction issues. Porchlight has been

operating the Northport Grouphome, a six-bed Community Based Residential Facility for homeless men with mental health and AODA issues, for over 20 years.

Since 1996, Porchlight has operated Safe Haven, a HUD-funded program serving homeless individuals with severe and persistent mental illness. Safe Haven also hosts a biweekly Volunteer Psychiatric Clinic providing free consultations and psychotropic medications to guests without insurance. Without this Volunteer Psychiatric Clinic, these homeless individuals would have to wait months to see a county-paid psychiatrist. In addition, an AODA counselor provides individual and group therapy on-site every week. The premise of a safe haven shelter is to provide a smaller shelter that offers a more relaxed environment where guests can receive one-on-one services. Many homeless, mentally ill persons who are unconnected to services are not ready to move into permanent housing directly from the streets or a regular emergency shelter. Porchlight's Safe Haven fits the immediate housing and service needs of this population by providing a safe, smaller shelter where hard to-reach homeless persons who suffer from mental health issues can relax and get their basic needs met. Safe Haven provides a critical first step to chronically homeless individuals who may not be ready for permanent housing. Once these persons become more stable, they will be referred to the permanent housing available through this grant. Safe Haven allows support staff time to slowly develop relationships of trust with guests, and ultimately connect them to appropriate housing and mental health services.

In 2012, Porchlight built a 24-efficiency apartment building to provide housing to people in recovery from substance abuse issues. Eighteen of these new units are for the PTO program. Prior to this, the PTO program operated out of our Brooks Street building. Over the last 20 years, the PTO program has provided hundreds of individuals in recovery a safe, clean and sober place to live. The program employs an AODA counselor and an employment/vocational counselor. These staff members provide intensive support and case management to the residents, meeting with them up to 4 times per week. The AODA counselor is a long term-Porchlight employee who is a licensed clinical social worker and a certified substance abuse counselor. This AODA counselor is also licensed to provide clinical supervision to other case managers at Porchlight. Thus far, with this supervision (which is required by the state of Wisconsin) two employees of Porchlight have become Substance Abuse Counselors – In Training. By providing this supervision, Porchlight enables case managers to reach their full potential and to be able to respond even better to the myriad of clinical issues this population presents with.

In addition to the 18 transitional units of PTO, the new building at Nakoosa Trail has 6 units of permanent housing for individuals in long-term recovery. In exchange for a brand new apartment and deeply discounted rent, these residents provide mentorship to the transitional residents of PTO. There is no other program of this type in Dane County.

In 1999, Porchlight started the STABLE Program. STABLE provides 8 units of SRO housing to women with mental health issues. A case manager provides intensive support services, including teaching daily living skills, money management, and assistance with employment and disability applications.

In 2007, Porchlight initiated a Housing First program, currently providing 12 units for families and 13 units of subsidized, permanent housing for singles who are chronically homeless and

have a disability. Many Housing First clients suffer from mental illness and substance use issues.

Of Madison's chronically homeless, 15% is veterans. To address the growing need for services benefiting homeless veterans, in 2009 Porchlight initiated a 24-SRO grant-and-per-diem program that coordinates outreach, housing, intensive treatment and other services for veterans with mental health and AODA issues at its Spring Street location. In 2013, Porchlight began contracting with a nurse from Meriter's Health Program to provide on-site nurse case management to the veterans, in an effort to better address their wide range of medical issues.

Also in 2009, Porchlight began providing outreach services to chronically homeless individuals with substance abuse and mental health issues who are living in places not meant for human habitation. In addition, outreach services are currently provided at a library in downtown Madison frequented by many homeless persons.

Porchlight maintains well-established collaborative networks with the Dane County Homeless Services Consortium and the Dane County Mental Health and AODA Consortium. Case managers attend both the monthly and committee meetings of both Consortiums. Porchlight's Safe Haven Coordinator meets monthly with the Shelter Providers Committee of the Homeless Services Consortium, a group of homeless service providers that have been meeting monthly for over 25 years. Porchlight's Director of Services facilitates the Continuum of Care Coordinating Committee that writes Dane County's HUD Continuum of Care Homeless Assistance Programs application.

Porchlight also collaborates with other Madison-area human service organizations, private businesses, and faith communities. Case managers and other program staff work closely with outside agencies to ensure appropriate referrals, to accurately assess potential and current residents, to prepare effective ISPs, and to assist with successful transitions to permanent housing. Partners in this effort include The Salvation Army, YWCA, Port St. Vincent, ARC Treatment Services, Tellurian, Hope Haven, Journey Mental Health Center, private AODA counselors, Department of Corrections, AIDS Network, Domestic Abuse Intervention Services, Tenant Resource Center, Division of Vocational Rehabilitation, Department of Veterans Affairs, Legal Action of Wisconsin, UW Medical School and many more.

3. Providing property management services for permanent supportive housing:

Porchlight is uniquely qualified to manage CDA's housing program with over 25 years experience operating, managing, and providing case management services to its own housing units. Porchlight owns, operates and provides case management to 292 housing units in Madison and Sun Prairie. Of the 292 units, 223 units provide permanent, supportive housing for homeless and low-income singles and families. In 2012, Porchlight provided housing to 320 men, women, and children, including 87,792 nights of shelter.

Porchlight provides all aspects of management for its housing programs, including but not limited to tenant screening, repair and maintenance, establishment and enforcement of rules and regulations, and provision of supportive services. The ability to provide all of these

services makes it easier to assess and intervene with any resident, maintenance or neighborhood issues immediately as they arise.

4. Providing property management services for low-income multi-unit housing in buildings of comparable size:

Porchlight has significant experience providing property management to larger multi-unit buildings. Porchlight owns, manages and provides supportive services for homeless and chronically homeless individuals with disabilities at 306 N. Brooks Street (87 SRO and 15 efficiency units), 4002 – 4016 Nakoosa Trail (14 SRO units and 34 efficiency units), 2718 Pheasant Ridge Trail (16 efficiency units) and 1102 Spring Street (24 SRO units).

Porchlight has been providing property management for a multitude (currently 292 units) of low-income units with multiple layers of funding for over 25 years. Our property management services include resident relations, rent collection, maintenance, leasing, waitlist maintenance, application screening, annual income certifications, monthly/annual government housing reporting (i.e. WHEDA, HUD, HOME, etc.), full accounting services, legal services as it relates to housing, and case management service and supervision.

The assessment of potential participants begins during the application and interview process. Upon receipt of an application, a complete credit history, criminal check, and income source verification are performed. Next, both the property manager and case manager conduct a personal interview to assess levels of candor, open-mindedness, and willingness to comply with program rules and expectations. This information is used to form a basis for determining program/housing acceptance. Individual service needs are explored during this initial screening so that appropriate referrals and recommendations can be made if an applicant is not accepted. For these individuals, every effort is made to connect them directly to other resources. Collaboration with existing supportive service systems is essential.

5. Providing property management services for housing with Section 42 low-income housing tax credits:

From 1997 to 2012, Porchlight successfully completed a tax credit project at 306 N. Brooks Street. This project was previously operated by a predecessor, Community Housing and Services, Inc. and taken over by Porchlight in 2004. Porchlight did all of the tax credit compliance and reporting for this project without significant compliance issues.

Porchlight provides day-to-day property management as listed in question 4. We offer comprehensive resident screening, including credit, criminal, landlord and employment references. Once an application is approved, all third party verifications are completed for units. Porchlight communicates with the residents directly to complete the application or the re-certification process. Once all of the paperwork is complete, Porchlight works with the residents to get their lease, income certification paperwork, and other documentation signed. Porchlight provides quarterly and annual reporting to WHEDA, maintains a capital reserve and budget, and provides full accounting services with audit-approved accounting practices.

3) REFERENCES

List three similar projects for which you have provided property management and case management services:

306 N Brooks St Madison, WI 53715

87 SRO and 15 efficiency units for homeless, low-income single men and women. Majority of residents have disabilities.

1102 Spring St Madison, WI 53713

24 SRO transitional units for homeless veterans. Majority of residents have disabilities.

4002 – 4016 Nakoosa Tr Madison, WI 53714

14 SRO and 34 permanent efficiency units for homeless single men and women. Majority of residents have disabilities.

4) FINANCIAL INFORMATION

a) At the request of the CDA, the teams shall make available for review by CDA and City staff or their agent copies of the firm's financial statements.

Porchlight will make available for review all financial statements, or all financial statements may be accessed through the Porchlight public website at www.porchlightinc.org.

