

## Affordable Housing Fund (AHF) Application

This application form should be used for projects seeking City of Madison AHF funds. Applications must be submitted electronically to the City of Madison Community Development Division by **noon on June 27, 2019**.

Email to: [cddapplications@cityofmadison.com](mailto:cddapplications@cityofmadison.com)

### APPLICANT INFORMATION

Proposal Title:	<u>Movin' Out - Red Caboose Apartments</u>		
Amount of Funds Requested:	<u>\$1,025,000</u>	Type of Project:	<input checked="" type="checkbox"/> New Construction <input type="checkbox"/> Acquisition/Rehab
Name of Applicant:	<u>Movin' Out, Inc.</u>		
Mailing Address:	<u>902 Royster Oaks Drive, Suite 105, Madison, WI 53714</u>		
Telephone:	<u>608-229-6910</u>	Fax:	<u></u>
Admin Contact:	<u>Megan Schuetz</u>	Email Address:	<u>ms@movin-out.org</u>
Project Contact:	<u>Megan Schuetz</u>	Email Address:	<u>ms@movin-out.org</u>
Financial Contact:	<u>Megan Schuetz</u>	Email Address:	<u>ms@movin-out.org</u>
Website:	<u>www.movin-out.org</u>		
Legal Status:	<input type="checkbox"/> For-profit <input checked="" type="checkbox"/> Non-profit	Type of LIHTC Application:	<input type="checkbox"/> 4% <input checked="" type="checkbox"/> 9%
Anticipated WHEDA Set-Aside:	<input type="checkbox"/> General <input type="checkbox"/> Preservation <input checked="" type="checkbox"/> Non-Profit		
Federal EIN:	<u>39-1833482</u>	DUNS #:	<u>019470348</u>

### AFFIRMATIVE ACTION

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

### 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 by contacting the Community Development Division at (608) 266-6520.

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: Kathryne Auerback

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 KA you are electronically signing your name as the submitter of the application and agree to the terms listed above.

Date: 6/26/19

## PROPOSAL DESCRIPTION

1. Please provide an overview of the proposal. Describe whether project is acquisition, rehabilitation, and/or new construction; multifamily or senior. Provide the total number of units proposed, the number and percent of affordable units proposed, and the impact of the proposed development on the community.

Movin' Out is proposing a mixed-use development located at 2340 Winnebago Street in Madison. The development would include 38 units of mixed-income multi-family apartments along with 21,000 square feet for a commercial condo that will be owned and operated by the Red Caboose Childcare Center. Red Caboose and Movin' Out will work together to market and manage a unique partnership to connect our two mission-aligned organizations in a way that produces an integral community asset providing both housing and childcare for low and moderate-income families in Madison. It should be noted that Red Caboose is not part of the ownership of the housing and will separately own and operate their space after the condo unit is sold to them at completion.

The 38 units at Red Caboose Apartments will be a mix of 1-, 2-, and 3-bedroom apartments of which 32 units will be targeted to households earning between 30% and 60% of County Median Income. The remaining 6 units will be market rate allowing the project to maximize WHEDA tax credit score and more fully integrate units for all incomes into the neighborhood. As with all projects developed and owned by Movin' Out, 20% of the total units (8 units) will be targeted to households in which a member has a permanent disability or is a military veteran. These units will be 30% CMI units that we intend to obtain project-based vouchers via the Section 8 or Section 811 program. Movin' Out has established a comprehensive service network through our longstanding history of working with residents with disabilities in Dane County. That service plan is attached to this response and further detailed later in this application.

In addition to targeting to households where one member has a permanent disability, Movin' Out is also working with various entities in the Homeless Services Consortium to target up to four units for individuals and/or families experiencing homelessness. As we worked to further define this target we met with The Road Home and learned that they also have a similar target of families where a family member has a disability. This alignment allows for us to include these targeted units as part of the Red Caboose Apartments with The Road Home providing the necessary services for successful integration and retention of homeless families.

The project has a variety of community amenities including a community room, community deck, fitness center, on-site management office, and tot room. We are working with Red Caboose to identify access for apartment residents to the large playground they intent to construct on the site. One underground parking space will be included in rent for each unit allowing for easy and affordable access in an urban location. In addition, the site is well served by Madison Metro and is surrounded by a variety of community amenities including health care, education, and employment.

This unique development provides much-needed affordable housing in Madison as well as providing housing solutions for individuals and families where one member has a permanent disability. Red Caboose Apartments will be an asset to the community. The project has been well received by local Alders and the neighborhood as it truly enhances access to affordable housing and childcare in the neighborhood.

2. What are the total number of units proposed to be assisted with City AHF and amount of AHF requested per affordable unit? Identify if any of the units will be supported by Section 8 project-based vouchers.

32 of the 38 units are set aside for families at below 60% CMI. We anticipate that most deeply targeted units will be supported by either Section 8 or Section 811 project-based vouchers. We are requesting \$1,025,000 in Affordable Housing Funds, or approximately \$32,000 per affordable unit.

3. Describe the project's organizational structure. Please attach an organizational chart detailing the roles of the applicant, all partners, and the ownership interest percentages of each party.

The project would be owned by a Limited Liability Company set up for the purpose of owning this development. That LLC would then have 99.99% of its interest owned by a Low Income Housing Tax Credit Investor. The other 0.01% would be owned by a Managing Member LLC that would be solely owned by Movin' Out, Inc. Movin' Out, Inc. is a 501(c) non-profit organization governed by a Board of Directors.

4. For projects that will be co-developed with a non-profit partner, please explain the non-profit's role in the development. State if the non-profit will have a controlling interest, Right of First Refusal, or General Partner Purchase Option.

N/A

## AFFORDABLE HOUSING INITIATIVE FUND GOALS & OBJECTIVES

5. Please check which of the following objectives outlined in the Request for Proposals your proposal meets:

- ☒ 1. Increase the supply of safe, quality, affordable rental housing throughout the City.
- ☐ 2. Preserve existing income- and rent-restricted rental housing to ensure long-term affordability and sustainability.
- ☐ 3. Improve the existing rental housing stock in targeted neighborhoods through acquisition/rehab to create long-term affordability and sustainability.

## AFFORDABLE HOUSING NEEDS

6. Describe your knowledge of and experience in identifying affordable housing needs of the City of Madison.

Movin' Out and its staff have extensive experience in identifying affordable housing needs both within the City of Madison and statewide in Wisconsin. Movin' Out has over 20 years of housing experience and over 10 years of multifamily affordable housing development experience. Dave Porterfield, Movin' Out's Director of Real Estate Development, has over 30 years of experience in planning and developing affordable housing in Madison and Wisconsin. Dave has served on the City of Madison's Affordable Housing Strategy Committee for over 5 years. This committee is charged with identifying the City's affordable housing needs. In this capacity he is very familiar with those needs in Madison. In addition, he currently serves as Vice-Chair on the Federal Home Loan Bank of Chicago's Community Investment Advisory Council. Megan Schuetz, Movin' Out's Real Estate Developer, has over 10 years of experience in multifamily development that includes direct experience in the Union Corners redevelopment. Please also see the Development Team Experience section and the Development Experience and Capacity Tab for additional information.

7. Please describe the anticipated demand for the proposed target populations served in this location.

A market study was completed for this development in 2018. While that project was initially larger, the study indicated a demand for affordable units in the area. The current approach of Red Caboose Apartments includes fewer units which should only be further supported by the demand previously identified. Movin' Out currently has a wait list of approximately 200 households looking for integrated supportive housing units in Dane County. This does not include wait lists held independently at individual completed apartment projects.

## INTEGRATED SUPPORTIVE HOUSING UNITS

8. Provide the number and percent of integrated supportive housing units proposed, the income category(ies) targeted for these units, and the population(s) you propose to serve (e.g. households experiencing or at risk of homelessness, formerly homeless families residing in Permanent Supportive Housing no longer in need of intensive support services, veterans, persons with disabilities, formerly incarcerated individuals, etc.).

8 units (20% of the total) will be targeted for integrated supportive housing units. All eight of these units will be targeted to households making at or below 30% of County Median Income. There will be 4 one-bedroom units, 2 two-bedroom units, and 2 three-bedroom units. The first priority for these units will be for households where one family member has a permanent disability or is a veteran. This is consistent with Movin' Out's mission and the significant need for units targeting this population. In addition, we are planning to partner with The Road Home to target units and provide referrals for families experiencing homelessness. The Road Home also has a focus on households where one member has a permanent disability so there is great alignment of missions between our two firms. The Road Home is interested working with us to provide services to these referrals. Since the majority of Movin' Out's referrals are looking for one-bedroom units, this allows us to target 2- and 3-bedroom units to the families being served by The Road Home.

9. Please describe your proposed integrated supportive housing approach that will go beyond meeting WHEDA's supportive housing requirements outlined in the Appendix S Checklist of the WHEDA Qualified Allocation Plan targeting

veterans and/or persons with disabilities. Please elaborate on which target populations you plan on serving and what supportive service partnership approach(es) you will use.

#### COMPARE TO LAST YEARS RESPONSE

Movin' Out implements a very detailed service plan on all projects it develops and owns. We consider ourselves to do more than "checking the box" when it comes to WHEDA's Appendix S requirements. We also feel strongly that any units committed to in the Appendix S should ultimately house an individual or family meeting the targeted population. For the Red Caboose Apartments we will be targeting 20% of the units (8 units) to households where one family member has a permanent disability or is a veteran. In our experience, the supportive housing units are typically the first units leased with households waiting in line the day applications are open for acceptance. When a unit becomes available, our property management partner will reach out to us allowing for the unit to be quickly filled with a qualifying household on our wait list. Our approach to services is truly a whole-person approach with the goal being to provide connections to services to any resident living at Red Caboose Apartments.

For services, Movin' Out has established Memorandums of Understanding with the following organizations: Care Wisconsin (adults with physical and/or developmental disabilities and frail elderly); Dane County Department of Human Services (children with disabilities and mental health services); and Dane County Veterans Service Office (veterans). We are working with The Road Home/Homeless Services Consortium (individuals and families experiencing homelessness) to develop an agreement as well. In addition to these relationship, Movin' Out has an established Community Impact Program that provides service coordination between the above mentioned groups, residents, and property management. Movin' Out also coordinates empowerment services available to all residents such as financial literacy, income tax preparation, and first time homebuyer education. The role of the Community Impact Coordinator is to serve as a conduit between a resident and all community connections (services, neighbors, property management) in order to ensure the long term success of the resident. Residents that Movin' Out works with directly are often long-term, successful residents that contribute to the success of the community they live in.

More details on services and Movin' Out's Community Impact Program can be found in the attached Service Plan.

10. Identify the partnership(s) with supportive service agencies that have been or will be formed to serve the target population(s) for the supportive housing units, including service provider(s) from the Continuum of Care (see Attachment C), if applicable. Provide a detailed description of the type and level of supportive services (such as assessment and referral, on-site intensive case management, etc.) that will be provided to residents of the proposed project.

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More details on services and Movin' Out's Community Impact Program can be found in the attached Service Plan.

11. In order to ensure the success of the development, the partnership(s), and the tenants, describe the level of financial support that the development will provide annually to the identified supportive service agency/agencies, if applicable. Attach a letter from the service provider(s) detailing the services they intend to provide to residents of the supportive housing units, the cost of those services and how those services will be financially supported (i.e., through the development, fundraising, existing program dollars, etc.).

As you will see on the attached MOU's as part of the Service Plan, there is no cost to the project for partner services. The various service partners have funding available through a variety of federal, state, and local resources to ensure services are available to qualifying residents. Due to the Red Caboose Apartments being a smaller development with much lower cash flow, the Community Impact Program and resident service coordination provided by Movin' Out will be partially paid for by Movin' Out and partially paid for via annual cash flow from the project. Each development is unique in its funding structure and we adjust accordingly to ensure long-term success of the development.

12. Identify any sources of non-City provided funding sources contemplated for supportive services.



N/A

## TENANT SELECTION

13. Describe your plans to incorporate flexible tenant selection criteria for households who are connected to supportive services, in order to provide housing opportunities for persons or families who would otherwise face common obstacles obtaining housing (e.g., poor credit, negative rental history, criminal conviction records, etc.). Specifically outline how this proposal embraces the City of Madison Tenant Selection Best Practices (Attachment B-1 of the RFP) and provides the maximum feasible flexibility in tenant selection to the general population and supportive service units.

Movin' Out has been working diligently with ACC Management over the past two years to further refine the Tenant Selection criteria to ensure flexibility to individuals and families facing obstacles in obtaining safe, decent, affordable housing. Movin' Out's own referrals are often individuals moving out of non-traditional housing (ie living at home with parents, living in a group home, etc.) that don't often allow them to pass more stringent selection criteria. All residents are screened using the same criteria to ensure compliance with Fair Housing. All residents should feel safe and secure in their home knowing that steps were taken to ensure the health and safety of all households.

Movin' Out will continue to work with ACC Management to devise a Tenant Selection Plan the incorporates accomodations for the following criteria:

- \* Income criteria - Minimum and maximum income requirements based on unit rents and required income limits will be clear to applicants at the time of application. Accomodations in the TSP will allow for a higher rent/income ratio.
- \* Occupancy criteria - The TSP will clearly indicate that at least one person per bedroom will occupy a unit except to allow for reasonable accomodations. This is consistent with Project Based Section 8 and Section 811 requirements as well. It is also unlikely that a resident would qualify for a deeply targeted unit larger than needed.
- \* Credit score and/or report - It is not anticipated that a credit score will be used as part of the screening criteria. A credit report will be ordered by the management agent and that requirement will be communicated to the applicant at the time of application. Other credit requirements will be communicated in the TSP and to the applicant at the time of application. All applicants are provided with a reason for denial and this would include information from a credit report. It should be noted that an applicant will not be denied solely for poor credit history if a co-signer is used and/or the applicant is enrolled in a credit repair program. Information from a credit report that is in dispute or in repayment will also not be a sole reason for denial if it is unrelated to past housing or housing utility obligations.
- \* Housing history - Denial requirements for negative rental history, including eviction, will be communicated at the time of application. An applicant will not be denied solely based on a lack of housing history. An applicant will not be denied solely for owing money to a prior landlord or utility company provided the applicant has entered into a payment arrangement with the debtor and is current on the repayment arrangement.
- \* Waitlist process - The TSP will note that units will be rents on a first come, first served basis. We are currently working to identify any preferences that will be given to the wait list. We hope to include a preference for teachers and childcare workers in the form of a separate wait list and are currently working to identify logistics of that approach. This development will have no age restriction.
- \* Notice of denial - At the time of denial all applicants are provided a written response explaining the reason for denial. Applicants will also be provided with the opportunity to further discuss the denial at a formal meeting should they so choose. The letter and the TSP will also detail out the appeal process.
- \* VAWA - The project intends to comply with VAWA and will work to include that language in the TSP.
- \* Supportive Housing Units - The targeted population for the supportive housing units will be clearly stated in the TSP. This will include an explanation of the process for applying for the supportive units and any available project-based rental subsidy. In addition, to comply with WHEDA Appendix S requirements, Movin' Out will be contacted to identify referrals for the 8 supported units. Those referrals will then proceed through the standard tenant screening process. The supported housing units' eligibility screening and assessment procedures used for this project will follow the same steps and use the same standards as the balance of the units in this project; however, in addition to that process, tenant eligibility status for supported housing units will also include a determination and verification that the household includes at least one member with a permanent disability and/or is an eligible military veteran or has experienced homelessness. The initial eligibility information and assistance in self-screening by interested parties will be provided by Movin' Out staff, in conjunction with the applicant's supportive services providers and/or guardian or family, as appropriate. Movin' Out will assist the prospective tenant by helping them to determine eligibility and in preparing them for formal application for tenancy then will refer them to the property management company for formal screening and eligibility determination. Movin' Out and ACC will affirmatively market the supported housing units.

The waiting list protocol will use a chronological list on a first-come first-served basis. For the supported housing units, Movin' Out will screen each applicant for their units to ensure that they meet the supportive service requirements. Once prospective tenants have been determined by Movin' Out staff to be eligible, they will forward the application to ACC for processing. ACC will utilize the tenant screening criteria described above, run the typical credit, criminal, housing references as well as confirm their eligibility with applicable affordable housing program requirements. Once ACC receives the referrals from Movin' Out they will process the applications in the order received. If ACC receives a prospect who may qualify for one of the supportive housing units, they will refer them to Movin' Out for initial eligibility screening.

\* Criminal and felony convictions - We are currently working with ACC to define the details of the criminal background check. We will work to provide specifics in the TSP to distinguish amongst criminal activities including the number of years included in the background check for various conduct. Should the project receive federal funding the overlying federal requirements will apply. The TSP will note that an applicant will not be rejected based on arrest records without conviction.

14. Describe the proposed development's minimum occupancy standards that will prevent or reduce over-housing residents in such limited affordable housing opportunities.

Red Caboose Apartments will implement a minimum occupancy of at least one person per bedroom for the affordable units. The only exception to this rule would be to allow for a single individual to live in a two-bedroom unit to accommodate medical equipment or live-in service help.

## PUBLIC PURPOSE AND RISK

15. Please describe the public purpose of your proposal and the risks associated with the project.

Red Caboose Apartments meets several public purposes including providing 38 units of workforce/affordable housing with 8 of those units having rents affordable to households with incomes at or below 30% of County Median Income. These units will be targeted as supported housing units and available to households that include family members who have a permanent disability and/or are military veterans. Four of these units are also anticipated to be targeted to families experiencing homelessness. Comprehensive supportive services will be available to these households and will be coordinated by Movin' Out to ensure stable and well managed housing integrated into the overall project and neighborhood. All eight of the units are anticipated to have Project Based Section 8 or Section 811 rental assistance attached thus providing truly affordable housing options to families in need of supported housing.

In addition to meeting the housing goals and needs of the community, this project goes beyond that to also provide a new home for Red Caboose Childcare Center and access to high quality childcare services. Red Caboose is the oldest independent center in Madison. It is licensed by the state and accredited by the city of Madison. In 1998, the University of Wisconsin Press published a book about Red Caboose, "The Good-Bye Window".

Red Caboose has a strong tradition of serving all children, including those with special educational, emotional, and physical needs and handicaps. They have a sliding-fee schedule for tuition, based on family size and income: families who can afford to pay more help defray the cost of care for those who earn less.

Red Caboose families are a diverse group in terms of race, ethnicity, income, and family type. Over 20% qualify for free or reduced meals through the Federal Child and Adult Care Food Program (CACFP). They have several families with adoptive or foster children, as well as other "non-traditional" families. In addition, their school age programs include children who are homeless or living in transitional housing.

This combination of affordable and integrated supported housing and early childcare services co-located and developed by two strong non-profit organizations working in partnership represents a significant and important investment in a public purpose.

As with any real estate development project there are the customary business risks for this project, however, Movin' Out and Red Caboose recognize those risks and have the experience and capacity to manage them. Movin' Out has developed 18 multifamily projects in the past 10 years (14 of these are Section 42 financed projects) consisting of over 1,000 units. Over 250 of these are supported housing units. Red Caboose Childcare Center has over 45 years of successful experience as a childcare provider. The balance of the development team also has extensive experience in their respective areas. Together this team has the required experience to manage the risks associated with planning, developing and managing the proposed project.

**SITE INFORMATION**

16. Address of Proposed Site: 2340 Winnebago Street, Madison, WI

17. In which of the following areas on the Affordable Housing Targeted Area Map (see Attachment A) is the site proposed located? Please check one.

- ☒ Preferred Areas (New Construction Only)  
☐ Eligible Areas (New Construction & Acquisition/Rehabilitation)  
☐ Targeted Rehab Areas (Ineligible for New Construction, but Preferred for acquisition & rehabilitation proposals)

18. Identify the neighborhood in which the site is located: Schenk-Atwood-Starkweather-Yahara Neighborhood

19. Date Site Control Secured: 6/14/19

20. Explain why this site was chosen and how it helps the City to expand affordable housing opportunities where most needed. Describe the neighborhood and surrounding community. Provide the streets of the closest major intersection as well as known structures/activities surrounding the site that identifies where the site is located. (Attach a map indicating project location. Include one close-up map of the site and a second map to show the site in the context of the City.)

The Red Caboose Apartments project is sited in an ideal location for this type of housing. There is strong demand and need for this housing; there is a robust array of community services available within easy walking distance; and it provides one of the best locations in the City for access to public transportation. It also closely matches the demographic profile of the surrounding neighborhood in terms of household income.

The project is located at 2340 Winnebago Street on the East side of Madison and is part of the Union Corners redevelopment area. The site also fronts on East Washington Avenue at the corner of 6th Street two blocks West of the intersection of East Washington and Milwaukee Street. There is new mixed-use development within the Union Corners including a full-service healthcare clinic and other planned future businesses as well as two other affordable housing projects either completed or under construction. Three blocks to the West on Winnebago a new mixed-use co-housing project is also under construction. The site is within easy walking distance to a wide range of community services and it is also within 5 blocks of the Capital City Bike Trail, a major Pedestrian and Bicycle trail. Please see the attached map of the area.

Both Movin' Out and Red Caboose Childcare found the concept of combining the uses of early childcare and education and affordable residential apartments in one project appealing for a number of reasons. We both believe that this collaborative effort provides opportunity for the two agencies to expand and increase the impact of their missions. It is well documented that access to stable and affordable housing has significant positive impact on families with young children as does access to high quality and affordable early child care. Residents in the Red Caboose Apartments will have easy access to both, thus strengthening both organizations and those they serve. For families with family members with disabilities the opportunity for childcare for disabled children and possible employment of adult persons with a disability offers unique new types of collaboration. For struggling families who may have experienced homelessness having access to stable housing and childcare will be transformational. Many military veteran families commonly share a strong interest in serving their country and community and given the opportunity to provide service to this dual mission may be compelling.

By combining the efforts of both organizations to share a newly constructed facility there are financial savings in terms of the cost of the project and economies of scale that this project offers. As we explored this opportunity we have identified a number of other similar type projects around the country that have been developed by other nonprofit groups and have been very successful. For more information on this type of development please visit:  
[https://bridgehousing.com/PDFs/BHC\\_ChildCare\\_mediumres.pdf](https://bridgehousing.com/PDFs/BHC_ChildCare_mediumres.pdf) .

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

There is an existing commercial building on the site which will be demolished. It was previously a retail outlet and has been vacant and unused for several years. It is not currently occupied and no relocation costs are anticipated. In addition, the project is acquiring two adjacent residential properties that will be demolished as part of the development. Any homes/apartments that are not owner occupied are assumed to have relocation costs as required by the Uniform Relocation Act. As part of securing the required zoning for the project a demolition permit will also be secured.

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22. Identify the distance the following amenities are from the proposed site.

Type of Amenities & Services	Name of Facility	Distance from Site (in miles)
Full Service Grocery Store	Jenifer Street Market	0.5
	Pick N Save	1.0
Public Elementary School	Emerson Elementary School	0.2
Public Middle School	O'Keefe Middle School	0.8
Public High School	East High School	0.1
Job-Training Facility, Community College, or Continuing Education Programs	Madison College - Commercial Avenue	0.7
Childcare	Red Caboose Child Care	On-Site
	Big Oak Child Care Center	0.4
Public Library	Hawthorne Library	0.3
Neighborhood or Community Center	Goodman Community Center	0.4
Full Service Medical Clinic or Hospital	UW Health Clinic	0.05
Pharmacy	US Health Pharmacy	0.05
Public Park or Hiking/Biking Trail	Wirth Court Park	0.4
	Hawthorne Park	0.2
Banking	Monona Bank Schenk's Corners	0.5
Retail	Family Dollar	0.4
	Madison East Shopping Center	0.4
	Atwood Avenue - Multiple	0.3
Other (list the amenities):		

24. What is the distance between the proposed site and the nearest seven-day per week transit stops (i.e. weekday and weekends)? List the frequency of service at that bus stop during both the weekday and on the weekends (e.g., hourly, ½ hour, commuter hours). List the bus route(s) numbers, seven-day transit stop street intersections and describe any other transit stops (include street intersections and schedule) located near the proposed site. Please do not include full bus schedules.

With the site located at the corner of East Washington Avenue and 6th Street there is a Madison Metro stop located on-site at 6<sup>th</sup> Street served by Routes 4 and 10. There is also a stop across 6<sup>th</sup> Street by the UW Health building and a stop across E. Washington. These two stops are served by Routes: 4, 6, 10, 14, 15, 56, and 57. Below is further detail on the frequency of service by route.

4 - 30 minute headways starting at about 6AM through 12:00 AM on weekdays. 1 hour headways from 7:30AM-10:30 PM on Saturday and Sunday.

6 - 20 minute headways starting at about 6AM through 12:00 AM on weekdays. 1 hour headways from 8:00AM-11:00 PM on Saturday and Sunday.

10 - 30 minute headways starting at about 8:30 AM through 3:00 PM on weekdays.

14 - 30 minute headways starting at about 6:30AM through 9:30 AM and 3:00 PM through 6:00 PM on weekdays.

15 - 30 minute headways starting at about 6:30AM through 9:30 AM and 2:30 PM through 6:00 PM on weekdays.

56 - 30 minute headways starting at about 6:30AM through 9:30 AM and 3:00 PM through 5:30 PM on weekdays.

57 - 30 minute headways starting at about 7:30AM through 9:30 AM and 3:00 PM through 5:30 PM on weekdays.

25. Describe the transit options for children to get to their elementary and middle schools.

Emerson Elementary is only 0.4 miles (8 minute walk) and O'Keefe Middle is 0.8 miles (15 minute walk). Madison Metro provides bus service down Winnebago Street as well. A bus would be provided by the school for any child with a documented disability. The High School is less than a block away.

26. 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 in the above responses, the site is located adjacent to multiple bus stops providing quick and easy access to many amenities and employment opportunities.

27. Describe the impact this housing will have on the schools in this area. Please include information on school enrollment data (e.g. at capacity, above capacity, below capacity); how this housing development will impact the schools' enrollment; and approximately how many elementary and middle school children are projected to live at the proposed housing development based on your proposed unit mix and previous housing experience. CDD recommends contacting Kristian Chavira at the Madison Metropolitan School District for information on potential impact to public schools at (608) 442-2920. Existing school capacity information can also be found at [https://accountability.madison.k12.wi.us/files/accountability/uploads/enrollment\\_reports\\_combined\\_fall\\_2018.pdf](https://accountability.madison.k12.wi.us/files/accountability/uploads/enrollment_reports_combined_fall_2018.pdf).

Below you will find the current capacity and anticipated 5 year capacity for two nearby elementary schools and O'Keefe Middle School. You will see that capacity is anticipated to be roughly the same or decrease in the next five years.

Emerson Elementary - 91.9% and in five years will be 92.1%

Lowell Elementary - 85.9% and in five years will be at 78.9%

O'Keefe Middle - 46.7% and in five years will be at 38.1%

Madison Metropolitan School District has around 27,000 students throughout the district. In our experience, the young people who live in our building are already in enrolled with in the local school system and, often times, already enrolled at the schools nearest to the development. It would not be atypically for a family to move from one elementary or middle school to another, but it would surprise us if this development impacted the total enrollment plus or minus 10 students.

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

The project site was originally developed in the early 1900s for a variety of small residential and retail uses. A gas station operated on the site from 1963 to 1976. The existing 4,000 SF commercial building on East Washington was previously a furniture store and most recently the show room for the Union Corners development.

Phase I and II Environmental Site Assessment and associated reviews have previously been performed on this site. New studies will be ordered as the project moves to closing as well. Below is a summary of the findings and recommendations regarding any remediation

The City of Madison Property-Former Union Corners Gas Station property located at 2340 Winnebago Street in Madison, Wisconsin is identified as tax parcel 0710-064-2220-9 and is located in a residential and commercial area of Madison.

A Phase 2 Environmental Site Assessment was completed by SCS on September 12, 2016. Based on the Phase 2 ESA Report, SCS reported:

- The property contains 0.62 acres of land with a 4,000-square foot commercial building located along East Washington Avenue. Historically the property consisted of several parcels that were developed with houses and stores. There was also a gas station located on the property between 1963 and 1976.
- The property was identified as having a leaking underground storage tank (LUST) in 2011 and was placed on the Geographic Information System (GIS) Registry for residual soil contamination before being closed by the Wisconsin Department of Natural Resources (WDNR) in 2013.
- SCS observed the excavation of nine test pits located throughout the property (TP-01 – TP-09) (Figure 2) and collected select soil samples for laboratory analysis of VOCs, PAHs, metals, and polychlorinated biphenyls (PCBs).
- TP-01 and TP-02 were completed in the area of the former closed LUST site and TP-03 through TP-09 were completed in other areas of the property not associated with the former closed LUST site.
- Soil samples were collected from TP-01 through TP-04, TP-07, and TP-08 for laboratory analysis. No samples were collected from TP-05, TP-06, and TP-09 for laboratory analysis.
- Lab analysis of the samples collected reported elevated concentrations of PVOCs near the vicinity of the former gas station, as well as elevated levels of PAHs and lead in shallow soil samples throughout the site. The results were reported to the WDNR by SCS and were then reviewed by the WDNR closure committee to determine if additional investigation would be necessary prior to requesting site closure.

#### Additional Phase 2 ESA Scope of Work:

Based on the findings, the WDNR closure committee suggested that more sampling be done in the areas where lead and PAH concentrations were reported and not associated with the closed LUST case. True North proposed additional sampling be performed to address the contamination found on other portions of the property (in TP-03, TP-04, TP-07, and TP-08 samples) in an attempt to delineate the horizontal and vertical extent of lead and PAH contamination at the property.

True North completed an additional Phase 2 ESA at the property which included the following:

- Coordinated excavation and laboratory subcontractors, arranged for utility clearance, and correspond with appropriate site contacts to facilitate field activities, and prepared a Site Specific Health and Safety Plan.
- Supervised the excavation of five test pits (TP-10 through TP-14) at the property utilizing an excavator. Test pits TP-10, TP-11, and TP-14 were completed to a maximum depth of 15 feet below ground surface (bgs) while TP-12 and TP-13 were excavated to depths ranging from seven to eight feet bgs. Groundwater at the property was encountered between 12 and 13 feet bgs.
- Submitted seven soil samples and one groundwater sample to Pace Analytical Labs for analysis of lead and/or PAHs.

True North's scope of work was designed to address the lead and PAH contamination found at

#### Additional Phase 2 ESA Field Activities

On November 22, 2016, True North supervised Haugen Excavating in completing five test pits (TP-10 through TP-14) near the test pits previously sampled by SCS and in areas not sampled by SCS, to identify the vertical and horizontal extent of the contamination (see Figure 2). Subsurface utilities were located by calling Digger's Hotline prior to completing test pits. Test pits were advanced to between 8- and 13-feet bgs.

Two soil samples were collected in laboratory-supplied containers at each test pit in order to identify the vertical extent of contamination. Groundwater was encountered at two test pits, however only one sample was able to be collected

due to the excavation walls collapsing. A temporary poly-vinyl chloride (PVC) well was installed in TP-14 in order to collect the groundwater sample from this test pit.

Soil samples were collected from depths of approximately one-foot bgs and six-feet bgs. Depending on the location of the test pit, soil samples were analyzed for lead and/or PAHs. Test pits located near former test pits with PAH results reported in the shallow one foot sample were not re-sampled at the one foot depth, rather PAH analysis was requested on the deeper 6 foot sample depth. This concept was implemented due to the very low PAH results reported by SCS (no concentrations exceeding an RCL or a "background" value) and was done to assist with delineating the vertical extent of soils impacted with PAHs for future development/management purposes.

All samples were immediately labelled and placed in a cooler with ice for transport to Pace in Green Bay for laboratory analysis.

#### Results:

The general subsurface lithology consists of fill material underlain by native silt, sand and clay to the depth of approximately seventeen feet bgs. Groundwater was encountered at approximately 12-feet bgs. SCS identified some non-native fill materials at the site.

The WDNR 2017 NR720 residual contaminant levels (RCLs) for the PAH benzo(a)pyrene was exceeded in the soil sample collected by SCS at TP-04 at one foot bgs. No RCL exceedances were identified in samples collected by True North. The True North sample from TP-13 at 6 feet bgs was reported with detectable concentrations of chrysene and benzo(a)pyrene, well below the RCLs and below the background values. No other samples collected from 6-feet bgs reported detectable concentrations of PAHs.

RCRA metals were reported in all soil samples collected from the property. However, concentrations of metals detected were generally within a range of naturally occurring background concentrations, with the exception of the shallow samples taken from TP-03, TP-04, TP-07, TP-08, TP-13, and TP-14. Lead concentrations at these locations were recorded above the WDNR RCL limit for the Protection of Groundwater Pathway. The background threshold value (BTV) for lead was exceeded in samples collected from 1-foot bgs at TP-04, TP-07, TP-08, and TP-14. The remaining shallow soil and all the deep soil samples were reported with lead concentrations below BTVs and RCLs.

The groundwater sample collected from TP-14 and analyzed for dissolved lead did not exceed the NR140 preventive action limit (PAL) or enforcement standard (ES).

Analytical results are presented in Table 1 through Table 3. A copy of the True North test pit logs are included in Appendix A. A copy of the laboratory report and chain of custody documentation for the samples collected by True North is included in Appendix B.

#### Findings and Conclusions

Based on the SCS Phase 2 ESA results and the True North Additional Phase 2 ESA results, True North finds the following:

- Fill material was identified at the site at thicknesses ranging from two feet to approximately six feet. Some of the fill material was identified by SCS as non-native fill and included demolition debris (e.g., wood, brick, concrete, glass) and industrial fill (e.g., pieces of coal and ash).
- All RCL and BTV exceedances were identified in the shallow soils (fill material). Samples collected from 6 feet bgs did not report any RCL or BTV exceedances.
- The Protection of Groundwater Pathway RCL for PAHs was not exceeded in any sample analyzed for PAHs.
- Lead was not detected above an NR140 PAL in groundwater at the site.

Based on these findings, True North concludes the following:

- The PAH and lead contamination appears to be isolated to fill material or shallow soils and is likely the result of atmospheric deposition or contaminated fill being brought to the site historically.

#### Recommendations

Based on the findings and conclusions, True North recommends the following:

- Develop a Material Management Plan (MMP) that will be implemented during the future development of the site.
- Based on the implementation of the MMP and future development of the site, request closure from the WDNR incorporating continuing obligations (e.g., cap maintenance plan), as warranted.

29. Current zoning of the site: 2340 S Winnebago Street is part of the Union Corners General Development Plan (GDP). The two houses, 2305 & 2311 E. Washington, are zoned Traditional Residential – Varied District 1 (TR-V1).

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

The project will require three demolition permits and three conditional use permits. The Union Corners GDP will need to be amended to include the two residential lots and as well as the proposed increased number of stories for the project. A Specific Implementation Plan, which will include the zoning text, will need to be approved as part of the rezoning. A Certified Survey Map will also be required to combine the lots and remove an obsolete ROW easement.

31. Describe the proposed project's consistency with adopted planning documents, including the City of Madison Comprehensive Plan (both adopted and draft of the Comprehensive Plan update), the Neighborhood Plan(s), the Generalized Future Land Use Map, and any other relevant plans. An interactive version of the Generalized Future Land Use Map can be found at

<https://cityofmadison.maps.arcgis.com/apps/webappviewer/index.html?id=71c4ec1397554f2ab702f2c6c377bb3a>.

The project is consistent with the local Schenk-Atwood-Starkweather-Yahara (SASY) neighborhood plan and the comprehensive plan. The project is also generally consistent with the existing Union Corners General Development Plan (GDP) which envisions a multi-story mixed-use building. However, the existing GDP references a 2-story building, in which case it will need to be amended to construct the proposed 4-story structure.

The project is consistent with the following recommendations in adopted comprehensive plan, Imagine Madison:

#### Neighborhoods and Housing

##### Strategy 3: Increase the amount of available housing

- Support new housing opportunities by prioritizing planning efforts to transition underutilized, automobile-dominated commercial areas into complete neighborhoods and mixed-use Activity Centers.
- Explore adjustments to the number of dwelling units, building size, and height thresholds between permitted and conditional uses to increase the allowable density for residential buildings in mixed-use zoning districts
- Explore the widespread replacement of residential density maximums with building height maximums outside of the downtown area

#### Transit Oriented Development

##### Strategy 5: Concentrate the highest intensity development along transit corridors, downtown, and at activity Centers.

- Implement Transit Oriented Development (TOD) overlay zoning along BRT and other existing and planned high-frequency transit service corridors
- Ensure that redevelopment is well-integrated with adjacent low-density residential areas
- Prepare plans to transition auto-oriented commercial areas into mixed-use Activity Centers

The Future Land Use Map recommends Community Mixed Use in this area which allows for a large multi-family building with up to six stories and up to 130 dwelling units per acre.



33. What is the anticipated date of your presentation to the City's Development Assistance Team (DAT)? If you have already presented to DAT, please provide the date of your presentation and summarize the comments to your proposal from staff.

The project was presented to DAT on June 20th. Overall, staff comments were positive. Traffic Engineering will require an operations plan for pick up and drop for both Red Caboose children and Movin' Out clients and the shared parking. Planning staff suggested, though not required, providing fencing between the remaining residential parcel and the surface parking lot.

34. List the date of your pre-application meeting with City of Madison Planning Division staff and briefly summarize the comments provided by Planning staff during that meeting.

The pre-application meeting occurred on June 3rd and included planning, zoning, TIF, and community development staff. The project design was well received by planning staff. The only concern revolved around the East Washington frontage. Planning staff requested it feel and look like the front of the building with an entrance and exit for residents. CDD staff requested a voluntary sales statement from each of the home owners.

35. 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 the project did s/he identify, if any? How will those be addressed?

The project was presented to District 6 Alder Marsha Rummel on May 1st and District 12 Alder Syed Abbas on May 10th. Alder Rummel is very familiar with the project and was pleased the current iteration was able to solve neighbors' concerns about parking and the height. Alder Abbas was extremely supportive of the project. He requested that property owners in his district on the north side of East Washington be included in the mailing for the neighborhood meeting.

36. Describe the neighborhood input process, including notification to and input from the nearby Neighborhood Association(s), already underway and planned. What issues or concerns with the project has been identified, if any? How will those be addressed?

The development team met with the SASY Planning and Development Committee on May 30th. The committee was pleased to see that the current project design addressed their previous concerns regarding parking and building height. They commended the development team for taking their comments seriously and bringing back much better project.

A neighborhood meeting was held on June 12th, with planning and CDD staff in attendance. Again, the project was well received as the current design directly addressed the previous neighborhood concerns listed above. The neighborhood asked the development team to make the following requests of the city:

1. Move the parking on 5th Street to the west side
2. Consider a left turn arrow from East Washington west bound onto 6th Street
3. Relocating the bus shelter to further from the corner of 6th and East Washington

These requests were relayed to staff at the DAT meeting on June 20th.

An additional neighborhood meeting will be led in late July once the architectural design has progressed.

37. Describe your affirmative marketing strategy and any other strategies to engage your intended population. Specifically outline how you will embrace the City of Madison's Affirmative Marketing Plan Best Practices (Attachment B-2 of the RFP).

ACC Management Group, Inc. (ACC) routinely participates in the management of affordable housing developments that target marketing efforts to certain demographic groups or give preferences to qualifying individuals. Examples of demographic groups that may be targeted include families with children and persons with disabilities. Examples of preferences include veterans, those at risk of homelessness, and age restrictions such as 55 and above.

ACC develops multiple documents for each property that assist staff members to understand the targeted marketing efforts required of the property, the preferences that the property may have, and the efforts that need to take place to reach those that qualify based on the preferences. If required, an Affirmative Fair Housing Marketing Plan (AFHMP) is created on Form HUD-935.2A. The AFHMP identifies the demographics of the marketing area and those that are least likely to apply. Community organizations that can influence populations identified as least likely to apply are identified and listed on the plan. An Eligibility Summary is developed for all properties. This document details other requirements and features of the property including income restrictions, accessible apartments, age restrictions, preferences, and service providers. It also explains the marketing efforts that are required to take place when a

qualifying apartment becomes available. These documents are a training platform and they are key in ACC's ability to maintain affirmative marketing efforts after the initial lease-up and throughout the restrictive use period.

Marketing generally includes broad efforts such as online marketing. This may include Apartments.com, Craigslist, Zillow, Trulia, Facebook, LinkedIn, and other platforms. Affirmative marketing is included in broad marketing efforts, often by listing the equal housing logo, the accessibility logo, and including certain verbiage such as 'qualifying applicants include those 55 and above.' Affirmative marketing is most successful with targeted outreach to community organizations that can connect qualifying persons with the housing. ACC has established many relationships with community organizations including Movin' Out, Lutheran Social Services, the YWCA, and many veteran organizations. ACC routinely communicates with each organization and develops interest lists for referred applicants that qualify for the preferences.

We believe this process complies with the expectations of the City of Madison's Affirmative Marketing Plan Best Practices as noted in Attachment B-2.

38. How will you affirmatively market to populations that will be identified as least likely to apply. Please reference successful past practices, relationships with agencies and/or marketing materials used.

ACC develops multiple documents for each property that assist staff members to understand the targeted marketing efforts required of the property, the preferences that the property may have, and the efforts that need to take place to reach those that qualify based on the preferences. If required, an Affirmative Fair Housing Marketing Plan (AFHMP) is created on Form HUD-935.2A. The AFHMP identifies the demographics of the marketing area and those that are least likely to apply. Community organizations that can influence populations identified as least likely to apply are identified and listed on the plan. An Eligibility Summary is developed for all properties. This document details other requirements and features of the property including income restrictions, accessible apartments, age restrictions, preferences, and service providers. It also explains the marketing efforts that are required to take place when a qualifying apartment becomes available. These documents are a training platform and they are key in ACC's ability to maintain affirmative marketing efforts after the initial lease-up and throughout the restrictive use period.

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In addition to their extensive experience, ACC was selected for management of this project in part because they have an established tenant screening process specifically designed to carefully identify and accept tenants who may otherwise often have their application for housing denied through most traditional tenant screening practices. Movin' Out and ACC have partnered previously on affordable housing developments and are confident in their abilities to meet the City of Madison's expectations in terms of affirmative marketing and tenant screening policies.

## SITE AMENITIES

39. Describe the exterior and common area amenities that will be available to tenants and guests, including parking (and cost, if any).

Red Caboose Apartments will have a community room on second floor that will be adjacent to a rooftop terrace. This community room will have an indoor kitchenette along with outdoor grilling. Adjacent to this will be an indoor activity room for young children as well, so they will have a safe and secure space to play. There will also be an exercise room available for all residents. This development will have a Red Caboose Childcare Center located on first floor that will have a large outdoor playground that we are currently negotiating to allow for use by residents when the daycare center is closed. This site is also adjacent to a community green space on the south side of Winnebago Street where residents and guests can enjoy the outdoors. This project will include one underground parking space for each unit available at no cost to the resident. Street parking is also available.

40. Describe the interior apartment amenities, including plans for internet service (and cost, if any) and a non-smoking environment.

Each unit will have high quality finishes in the form of Luxury Vinyl flooring, wood trim, and solid surface countertops and vanities. They will also have energy efficient appliances including in-unit laundry. Units will also include central air conditioning, patio/balcony, window treatments, dishwasher, disposal, and microwave. The building will be operated as a non-smoking environment which is even more critical considering the childcare center on the first floor. We are

also including internet in each unit at no cost to the resident. Right now we are anticipating a cost of \$30/unit/month but also hope to further investigate opportunities that could be available to the two non-profit groups.

## PROPOSAL TIMELINE

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

Activity/Benchmark	Estimated Month/Year of Completion
Draft Site Plan Ready to Submit to Dev. Assistance Team (DAT) [Target/Actual Month/Date]	6/14/19
1 <sup>st</sup> Development Assistance Team/ Meeting (Due by 7/18/19) [Target/Actual Month/Date]	6/20/19
1 <sup>st</sup> Neighborhood Meeting (Due by 8/9/19) [Target Month/Date]	6/12/19
Submission of Land Use Application (Zoning Map Amendments Due by 9/25/19)	8/14/19
Submission of Land Use Application (Permissively Zoned Due by 10/9/19)	N/A
Plan Commission Consideration (If Rezoning, Due by 11/25/19 for 12/3/19 Common Council)	11/11/19
Urban Design Commission Consideration, if applicable [Target Month/Date]	10/30/19
Application to WHEDA	12/13/19
Complete Equity & Debt Financing	4/1/21
Acquisition/Real Estate Closing	4/1/21
Rehab or New Construction Bid Publishing	2/1/21
New Construction/Rehab Start	4/2/21
Begin Lease-Up/Marketing	1/1/22
New Construction/Rehab Completion	3/31/22
Certificates(s) of Occupancy Obtained	3/31/22
Complete Lease-Up	8/1/22
Request Final AHF Draw	8/15/22

## DEVELOPMENT TEAM

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

Contact Person	Company	Role in Development	E-mail	Phone
Kathryne Auerback	Movin' Out, Inc.	Developer/Owner	ka@movin-out.org	608-251-4446
Megan Schuetz	Movin' Out, Inc.	Developer/Owner	ms@movin-out.org	608-229-6910
David Porterfield	Movin' Out, Inc.	Developer/Owner	dp@movin-out.org	608-229-6917
Melissa Huggins	Urban Assets	Project Planning and Zoning Consultant	melissa@urbanassetsconsulting.com	608-819-6566
Katie Rist	Foley & Lardner	Attorney	krist@foley.com	608-258-4317
Kevin Burow	Knothe & Bruce Architects	Architect	kburow@knothebruce.com	608-836-3690
Aaron Kostichka	McGann Construction	General Contractor	Aaron.Kostichka@mcgannconstruction.com	608-241-5585
Chris Hand	ACC Management	Property Manager	chris@accmanagementgroup.com	920-966-9905
Mary Myers	Movin' Out, Inc.	Service Provider - Resident Service Coordination	mm@movin-out.org	608-251-4446

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44. For the following development team roles, please identify the number and/or percentage of women and persons of color employed by that company.

<b>Company</b>	<b>Role in Development</b>	<b># or % Employees who are Women</b>	<b># or % Employees who are Persons of Color</b>
Movin' Out, Inc.	Developer	77%	12%
McGann Construction	General Contractor	8%	10%
ACC Management	Property Manager	46%	15%
Knothe & Bruce Architects	Architect	37%	6%
Movin' Out, Inc.	Service Provider	77%	12%

#### **DEVELOPMENT TEAM EXPERIENCE AND CAPACITY**

Please describe the development team's experience in obtaining and successfully implementing LIHTC developments in accordance with the Additional Application Materials Section 2.4, Item 2 of the RFP.

#### **REFERENCES**

45. Please list at least three references who can speak to your work on similar developments completed by your team.

<b>Name</b>	<b>Relationship</b>	<b>Email Address</b>	<b>Phone</b>
Chris Jaye - The Commonwealth Companies	Co-Development Partner on 6 projects	c.jaye@commonwealthco.net	608-824-2294
Seah O'Brien - WHEDA	Financed and allocated tax credits for several previous developments	sean.obrien@wheda.com	608-267-1453
Don Bernards - Baker Tilly	Provides consulting and accounting services	donald.bernards@bakertilly.com	608-240-2643

**HOUSING INFORMATION & UNIT MIX**

46. 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>2340 Winnebago Street</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%	8	0	4	2	2	0		833	983	1399	
40%	0	0	0	0	0	0					
50%	19	0	8	7	4	0		803	967	1117	
60%	5	0	1	2	2	0		926	1113	1286	
<b>LIHTC Sub-total</b>	<b>32</b>	<b>0</b>	<b>13</b>	<b>11</b>	<b>8</b>	<b>0</b>					
<b>Market*</b>	<b>6</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>0</b>		1000	1250	1500	
<b>Total Units</b>	<b>38</b>	<b>0</b>	<b>15</b>	<b>13</b>	<b>10</b>	<b>0</b>	Notes: We are assuming all 8 30% units will have project-based Section 8 or Section 811 vouchers.				

\*40% = 31-40% CMI; 50% = 41-50% CMI; 60% = 51-60% CMI; Market = >61% 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>LIHTC Sub-total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>					
<b>Market*</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>					
<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; Market = >61% CMI.

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

47. Utilities/amenities included in rent: ☒ Water/Sewer ☐ Electric ☐ Gas ☒ Free Internet In-Unit  
☒ Washer/Dryer ☒ Other: Underground Parking

48. Describe the number and percent of accessible units proposed for each of level of accessibility. For rehab, describe the accessibility modifications that will be incorporated into the existing housing.

All of the apartment units will be visitable by persons with disabilities which includes a clear and accessible pathway to and through the unit along with a bathroom within the unit that meets the requirements for clearances for a Type B bathroom per ANSI A117.1-2009. There will also be 2 fully ADA accessible units (5%) and 6 additional units (20% of total units) that are a higher level of accessibility, meeting the requirements of WHEDA. Note, only 2% of the units are required to be fully accessible by code. Movin' Out's mission focuses on providing housing solutions for people with disabilities and as such pays close attention to ensuring a high level of accessibility. We incorporate accessible options as baseline standard for all units regardless of occupant. An example is ensuring accessible thresholds to a patio or balcony on all units or lowering all light switches in all units. We will also include automatic door openers in common area spaces.

49. Please describe the sustainable, energy efficient, and/or green building design techniques and standards that will be incorporated into the proposed project (including, but not limited to, renewable ready, EV-ready, PV solar panels, tree planting, green roofs, reuse/repurposing of graywater, solar hot water, ground- or air sourced heat pumps, heat recovery ventilators, etc.). Identify any energy industry standards that will be achieved. Please describe how the housing project 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](#).

This project will achieve a score of at least 150 points in the Wisconsin Green Built Home Standard. The exterior building envelope will also be designed to be a minimum of 3% more energy efficient than is required by the Wisconsin Department of Safety and Professional Services. The roof will be structured in order to accommodate solar panels to be used for either solar hot water or photovoltaics. It is anticipated that Red Caboose Apartments will include solar panels and we are working to determine what capacity of solar the project could accommodate and pay for. There will also be EV charging stations within the basement parking garage. All units will be furnished with Energy Star rated appliances and there will be a central hot water system that will utilize high efficiency gas fired boilers. All plumbing fixtures and faucets will be low-flow as well in order to reduce the amount of water used.

Movin' Out is also focused on increasing sustainability and energy efficiency in its developments. We are focused on pursuing opportunities for grants and other fundraising in our efforts to address systems and techniques we might be able to incorporate in the Red Caboose Apartments.

50. Estimate the resulting monthly, annual or life of project cost savings for the project and for tenants as a result of the implemented methods above.

We are still determining the systems that will be used and implemented so we are unable to identify savings at this time. We anticipate passing along savings to residents via lower rents or lower utility costs.

51. Focus on Energy's (FOE) Design Assistance Program provides no-cost design consultation and assistance, including renewable energy analysis, e.g., solar readiness, and searches for incentives and/or rebates to fund the cost difference of the proposed building energy improvements. FOE compensates developers for the staff time dedicated to this process. Contact Barb Ohlsen, AIA, at (608) 709-1396 to discuss program details.

**Would you be willing to apply for a renewable energy analysis and incorporate its recommendations where financially feasible?** ☒ Yes ☐ No

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

N/A

### 53. Real Estate Project Data Summary

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:	2430 Winnebago St.								

	# 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:	0	38	0	0	0	8	860,000	TBD	\$1
	2305 E. Washington Ave.								
	1	included above	1	0	0	See above	N/A	Included in above	\$270,000
Address:	2311 E. Washington Ave								
	1	included above	1	1	0	See above	N/A	Included in above	\$265,000

54. Will any business or residential tenants will be displaced temporarily or permanently? If so, please describe the relocation requirements, relocation plan and relocation assistance that you will implement or have started to implement.

No businesses will be displaced. The project does incorporate the purchase of two single family buildings. One home is occupied by the owner and no relocation is anticipated as the owner has chosed to sell the property. The other home does have renters and relocation will be provided consistent with the Uniform Relocation Act.



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

- ☒ 1. A completed Application Budget Workbook, showing the City's proposed financial contribution and all other proposed financing.
- ☒ 2. Description of the Development Team's Experience and Capacity per Section 2.4, Item 2 of the RFP.
- ☒ 3.a. Letter(s) from Supportive Service Provider(s) detailing what services are necessary to be adequate for the number of supportive housing units and target population as well as what level of services they intend to provide.
- ☒ 3.b. A detailed map of the site and a second map showing the site in the context of the City.
- ☒ 3.c. A preliminary site plan and drawings, if available.
- ☐ 3.d. A Capital Needs Assessment report of the subject property, if the proposal is for a rehabilitation project and if the report is available at the time of application.

NOTE: If a preliminary site plan is not available at the time of application, submittal will be required for DAT by mid-July. If the Capital Needs Assessment is not available at the time of application for a rehab project, submittal will be required by August 30, 2019.

APPLICANT &amp; PROJECT NAME:

Movin' Out, Inc. - Red Caboose Apartments

## 1. CAPITAL BUDGET

Enter ALL proposed project funding sources.

## FUNDING SOURCES

Source	Amount	Non-Amortizing (Y/N)	Rate (%)	Term (Years)	Amort. Period (Years)	Annual Debt Service
Permanent Loan-Lender Name:						
WHEDA First Mortgage	\$ 2,865,056	N	5.90%	35	35	\$193,732
Subordinate Loan-Lender Name:						
Subordinate Loan-Lender Name:						
Tax Exempt Loan-Bond Issuer:						
AHP Loan	\$ 480,000	Y	0.00%	0	0	\$0
City-AHF Deferred Loan	\$ 512,500	Y	0.00%	0	0	\$0
City-AHF Interest/Cash Flow Loan	\$ 512,500	Y	2.75%	16	30	\$25,107
City-TIF Loan						
Other-Specify Lender/Grantor:						
Dane County AHDF	\$ 500,000	Y	0.00%	0	0	\$0
Other-Specify Lender/Grantor:						
Other-Specify Lender/Grantor:						
Tax Credit Equity	\$ 5,193,813					
Historic Tax Credit Equity						
Deferred Developer Fees	\$ 326,797					
Owner Investment						
Other-Specify:						
Red Caboose Condo Purchase	\$ 2,325,000					
<b>Total Sources</b>	<b>\$ 12,715,666</b>					

Construction Financing			
Source of Funds	Amount	Rate	Term (Months)
Construction Loan-Lender Name:			
WHEDA/IFF	\$ 9,947,607	5.90%	24
Bridge Loan-Lender Name:			
AHP Funds, AHF Funds, Deferred Fee	\$ 1,729,297		0
Tax Credit Equity:			
	\$ 1,038,762		
<b>Total</b>	<b>\$ 12,715,666</b>		

Estimated pricing on sale of Federal Tax Credits:

\$ 0.88

Estimated pricing on sale of State Tax Credits:

(if applicable)

Remarks Concerning Project Funding Sources:

The City funding is split as prescribed. An interest only payment on the cash flow note will be paid followed by the deferred developer fee. Full principal and interest payments will resume upon repayment of the deferred fee in year 12.

APPLICANT:

Movin' Out, Inc. - Red Caboose Apartments

## 2. PROJECT EXPENSES

Enter the proposed project expenses

### Acquisition Costs

#### Amount

Land	\$535,001
Existing Buildings/Improvements	\$0
Other (List)	
	\$0

### Construction:

Construction/Rehab Costs	\$6,070,000
Construction Profit	\$347,845
Construction Overhead	\$123,800
General Requirements	\$309,500
Construction Supervision	\$0
FF&E/Personal Property	\$0
Demolition	\$232,500
Site Work	\$35,430
Landscaping	\$120,000
Construction Contingency	\$348,556
Other (List)	
Red Caboose White Box	\$2,325,000

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

75000

Total Cost:

\$75,000

### Architectural & Engineering

Architect - Design	\$85,000
Architect - Supervision	\$24,000
Engineering	\$86,894
Other (List)	
	\$0

### Interim/Construction Costs

Builder's Risk/Property Insurance	\$35,000
Construction Loan Interest	\$325,000
Construction Loan Origination Fee	\$100,000
Real Estate Taxes	\$20,000
Park Impact Fees	\$25,000
Other Impact Fees	\$15,000
Other (List)	
Lender Legal	\$25,000

### Financing Fees

Cost of Bond Issuance	\$0
Permanent Loan Origination Fee	\$0
Other Permanent Loan Fees	\$0

### Soft Costs

Appraisal	\$5,000
Market Study	\$9,000
Environmental Reports	\$20,000
Survey	\$10,000

Permits	\$30,000
Lease-Up Period Marketing	\$30,000
Tax Credit Fees	\$62,177
Accounting/Cost Certification	\$20,000
Title Insurance and Recording	\$30,000
Relocation	\$15,000
FF&E	\$50,000
Capital Needs Assessment (if rehab)	\$0
Legal	\$90,000
Other (List)	
Soft Cost Contingency	\$15,000
<b>Fees:</b>	
Bridge Loan Fees	\$0
Organizational Fees	\$0
Syndication Fees	\$50,000
Development Fee	\$773,000
Developer Overhead	\$0
Other Consultant Fees	\$25,000
Other (List)	
	\$0
<b>Reserves Funded from Capital:</b>	
Lease-Up Reserve	\$100,000
Operating Reserve	\$192,963
Replacement Reserve	\$0
Capital Needs Reserve	\$0
Debt Service Reserve	\$0
Escrows	\$0
<b>Other: (List)</b>	
\$12,715,666	\$0
<b>TOTAL COSTS:</b>	<b>\$12,715,666</b>

APPLICANT: **Movin' Out, Inc. - Red Caboose Apartments**

### 3. 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	467,732	477,087	486,628	496,361	506,288	516,414	526,742	537,277	548,023	558,983	570,163	581,566	593,197	605,061	617,162	629,506
Less Vacancy/Bad Debt	32,741	33,396	34,064	34,745	35,440	36,149	36,872	37,609	38,362	39,129	39,911	40,710	41,524	42,354	43,201	44,065
<b>Income from Non-Residential Use*</b>	4,800	4,896	4,994	5,094	5,196	5,300	5,406	5,514	5,624	5,736	5,851	5,968	6,088	6,209	6,333	6,460
<b>Total Revenue</b>	<b>439,791</b>	<b>448,587</b>	<b>457,558</b>	<b>466,709</b>	<b>476,044</b>	<b>485,565</b>	<b>495,276</b>	<b>505,181</b>	<b>515,285</b>	<b>525,591</b>	<b>536,102</b>	<b>546,825</b>	<b>557,761</b>	<b>568,916</b>	<b>580,295</b>	<b>591,900</b>
<b>Expenses:</b>																
Office Expenses and Phone	15,000	15,450	15,914	16,391	16,883	17,389	17,911	18,448	19,002	19,572	20,159	20,764	21,386	22,028	22,689	23,370
Real Estate Taxes	38,000	39,140	40,314	41,524	42,769	44,052	45,374	46,735	48,137	49,581	51,069	52,601	54,179	55,804	57,478	59,203
Advertising, Accounting, Legal Fees	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
Payroll, Payroll Taxes and Benefits	25,320	26,080	26,862	27,668	28,498	29,353	30,233	31,140	32,075	33,037	34,028	35,049	36,100	37,183	38,299	39,448
Property Insurance	21,000	21,630	22,279	22,947	23,636	24,345	25,075	25,827	26,602	27,400	28,222	29,069	29,941	30,839	31,764	32,717
Mtc, Repairs and Mtc Contracts	24,000	24,720	25,462	26,225	27,012	27,823	28,657	29,517	30,402	31,315	32,254	33,222	34,218	35,245	36,302	37,391
Utilities (gas/electric/fuel/water/sewer)	22,000	22,660	23,340	24,040	24,761	25,504	26,269	27,057	27,869	28,705	29,566	30,453	31,367	32,308	33,277	34,275
Property Mgmt	26,354	27,145	27,959	28,798	29,662	30,552	31,468	32,412	33,384	34,386	35,418	36,480	37,575	38,702	39,863	41,059
Operating Reserve Pmt		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	11,400	11,742	12,094	12,457	12,831	13,216	13,612	14,021	14,441	14,874	15,321	15,780	16,254	16,741	17,244	17,761
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
In Unit Internet - \$30/unit/month	13,680	14,090	14,513	14,949	15,397	15,859	16,335	16,825	17,329	17,849	18,385	18,936	19,504	20,090	20,692	21,313
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Operating Expenses</b>	<b>206,754</b>	<b>212,957</b>	<b>219,345</b>	<b>225,926</b>	<b>232,703</b>	<b>239,685</b>	<b>246,875</b>	<b>254,281</b>	<b>261,910</b>	<b>269,767</b>	<b>277,860</b>	<b>286,196</b>	<b>294,782</b>	<b>303,625</b>	<b>312,734</b>	<b>322,116</b>
<b>Net Operating Income</b>	<b>233,037</b>	<b>235,630</b>	<b>238,213</b>	<b>240,784</b>	<b>243,340</b>	<b>245,880</b>	<b>248,401</b>	<b>250,900</b>	<b>253,375</b>	<b>255,824</b>	<b>258,242</b>	<b>260,629</b>	<b>262,979</b>	<b>265,291</b>	<b>267,561</b>	<b>269,784</b>
<b>Debt Service:</b>																
First Mortgage	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732
Second Mortgage		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)																
Supportive Services - Movin' Out	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,666	13,048	13,439	13,843	14,258	14,685	15,125	15,580
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Debt Service</b>	<b>203,732</b>	<b>204,032</b>	<b>204,341</b>	<b>204,659</b>	<b>204,987</b>	<b>205,325</b>	<b>205,673</b>	<b>206,031</b>	<b>206,398</b>	<b>206,780</b>	<b>207,171</b>	<b>207,575</b>	<b>207,990</b>	<b>208,417</b>	<b>208,857</b>	<b>209,312</b>
<b>Total Annual Cash Expenses</b>	<b>410,486</b>	<b>416,989</b>	<b>423,686</b>	<b>430,585</b>	<b>437,690</b>	<b>445,010</b>	<b>452,548</b>	<b>460,312</b>	<b>468,308</b>	<b>476,547</b>	<b>485,031</b>	<b>493,771</b>	<b>502,772</b>	<b>512,042</b>	<b>521,591</b>	<b>531,428</b>
<b>Total Net Operating Income</b>	<b>29,305</b>	<b>31,598</b>	<b>33,872</b>	<b>36,125</b>	<b>38,353</b>	<b>40,555</b>	<b>42,728</b>	<b>44,869</b>	<b>46,977</b>	<b>49,044</b>	<b>51,071</b>	<b>53,054</b>	<b>54,989</b>	<b>56,874</b>	<b>58,704</b>	<b>60,472</b>
<b>Debt Service Reserve</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Deferred Developer Fee</b>	<b>15,211</b>	<b>17,504</b>	<b>19,778</b>	<b>22,031</b>	<b>24,259</b>	<b>26,461</b>	<b>28,634</b>	<b>30,775</b>	<b>32,881</b>	<b>34,950</b>	<b>36,977</b>	<b>37,336</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Cash Flow</b>	<b>14,094</b>	<b>14,094</b>	<b>14,094</b>	<b>14,094</b>	<b>14,094</b>	<b>14,094</b>	<b>14,094</b>	<b>14,094</b>	<b>14,096</b>	<b>14,094</b>	<b>14,094</b>	<b>15,718</b>	<b>54,989</b>	<b>56,874</b>	<b>58,704</b>	<b>60,472</b>
AHF City Interest Loan	14,094	14,094	14,094	14,094	14,094	14,094	14,094	14,094	14,094	14,094	14,094	15,718	25,107	25,107	25,107	25,107

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

<b>DCR Hard Debt</b>	1.20	1.22	1.23	1.24	1.26	1.27	1.28	1.30	1.31	1.32	1.33	1.35	1.36	1.37	1.38	1.39
<b>DCR Total Debt</b>	1.07	1.08	1.09	1.10	1.11	1.12	1.13	1.14	1.15	1.16	1.17	1.17	1.13	1.14	1.14	1.15

### Assumptions

Vacancy Rate	7.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%

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

Assumes approximate 12 units with a pet at \$20/mo (\$2880); approximately 5 units/mo for \$20 late fees (\$1200); 2 application fees per month at \$30 (\$720)

Other

Service payment is below the line - paid

APPLICANT:

Movin' Out, Inc. - Red Caboose Apartments

### 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	642,096	654,938	668,036	681,397	695,025	708,926	723,104	737,566	752,318	767,364	782,711	798,365	814,333	830,619
Less Vacancy/Bad Debt	44,947	45,846	46,763	47,698	48,652	49,625	50,617	51,630	52,662	53,715	54,790	55,886	57,003	58,143
<b>Income from Non-Residential Use*</b>	6,589	6,721	6,856	6,993	7,133	7,275	7,421	7,569	7,720	7,875	8,032	8,193	8,357	8,524
<b>Total Revenue</b>	603,738	615,813	628,130	640,692	653,506	666,576	679,908	693,506	707,376	721,523	735,954	750,673	765,686	781,000
<b>Expenses:</b>														
Office Expenses and Phone	24,071	24,793	25,536	26,303	27,092	27,904	28,742	29,604	30,492	31,407	32,349	33,319	34,319	35,348
Real Estate Taxes	60,979	62,808	64,692	66,633	68,632	70,691	72,812	74,996	77,246	79,564	81,950	84,409	86,941	89,549
Advertising, Accounting, Legal Fees	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
Payroll, Payroll Taxes and Benefits	40,631	41,850	43,106	44,399	45,731	47,103	48,516	49,971	51,470	53,014	54,605	56,243	57,930	59,668
Property Insurance	33,699	34,710	35,751	36,824	37,928	39,066	40,238	41,445	42,689	43,969	45,288	46,647	48,046	49,488
Mtc, Repairs and Mtc Contracts	38,513	39,668	40,858	42,084	43,347	44,647	45,986	47,366	48,787	50,251	51,758	53,311	54,910	56,558
Utilities (gas/electric/fuel/water/sewer)	35,304	36,363	37,454	38,577	39,734	40,926	42,154	43,419	44,721	46,063	47,445	48,868	50,334	51,844
Property Mgmt	42,290	43,559	44,866	46,212	47,598	49,026	50,497	52,012	53,572	55,179	56,835	58,540	60,296	62,105
Operating Reserve Pmt	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Replacement Reserve Pmt	18,294	18,842	19,408	19,990	20,590	21,207	21,844	22,499	23,174	23,869	24,585	25,323	26,082	26,865
Support Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
In Unit Internet	21,952	22,611	23,289	23,988	24,708	25,449	26,212	26,999	27,809	28,643	29,502	30,387	31,299	32,238
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Expenses</b>	331,779	341,733	351,985	362,544	373,421	384,623	396,162	408,047	420,288	432,897	445,884	459,260	473,038	487,229
<b>Net Operating Income</b>	271,959	274,080	276,145	278,148	280,085	281,953	283,746	285,459	287,088	288,626	290,070	291,413	292,648	293,771
<b>Debt Service:</b>														
First Mortgage	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732	193,732
Second Mortgage	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other (List)														
Supportive Services - Movin' Out	16,047	16,528	17,024	17,535	18,061	18,602	19,161	19,736	20,328	20,938	21,566	22,213	22,879	23,566
	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total Debt Service</b>	209,779	210,260	210,756	211,267	211,793	212,334	212,893	213,468	214,060	214,670	215,298	215,945	216,611	217,298
<b>Total Annual Cash Expenses</b>	541,558	551,993	562,741	573,811	585,214	596,957	609,055	621,515	634,348	647,567	661,182	675,205	689,649	704,527
<b>Total Net Operating Income</b>	62,180	63,820	65,389	66,881	68,292	69,619	70,853	71,991	73,028	73,956	74,772	75,468	76,037	76,473
<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>	62,180	63,820	65,389	66,881	68,292	69,619	70,853	71,991	73,028	73,956	74,772	75,468	76,037	76,473
AHF City Interest Loan	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107	25,107

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

<b>DCR Hard Debt</b>	1.40	1.41	1.43	1.44	1.45	1.46	1.46	1.47	1.48	1.49	1.50	1.50	1.51	1.52
<b>DCR Total Debt</b>	1.16	1.16	1.17	1.18	1.18	1.19	1.19	1.20	1.20	1.20	1.21	1.21	1.21	1.21

### Assumptions

Vacancy Rate	7.0%
Annual Increase Income	2.0%
Annual Increase Expenses	3.0%
Other	



## **DEVELOPMENT TEAM EXPERIENCE & CAPACITY**

### **MOVIN' OUT EXPERIENCE OVERVIEW**

Movin' Out, Inc. is a nearly 25-year old 501(c)3 non-profit organization, overseen by a board of directors, and serving individuals with disabilities and families with a member with a disability, as well as veterans, across the state of Wisconsin. Movin' Out provides a range of safe, community-integrated, affordable housing solutions, from HUD-certified housing counseling and assistance with down-payment and rehab, to a variety of rental housing options.

We work in close partnership with human service agencies to ensure that households who need supportive services to be successful in their homes have a commitment for those services as part of their housing plan. We work with property management organizations to ensure high quality ongoing management and maintenance. Movin' Out provides Tenant Success Services to residents who live in supportive units to address the gap between property management and supportive services provided by others.

Movin' Out, Inc. has assisted over 1,600 low-income households to purchase homes. Additionally, during the past 13 years, Movin' Out, Inc. has developed and owns and operates over 1,000 units of affordable rental units in five Wisconsin counties. We have participated in the entire development process, from planning and securing capital subsidies to coordinating with partners through design and construction and then managing the process through lease-up and long term operations.

Movin' Out has assembled a highly qualified development team to plan, develop, construct, and manage the Red Caboose Apartments. With Movin' Out as the lead developer we will also be working with Knothe & Bruce Architects, McGann Construction, ACC Management, and Urban Assets as zoning consultant. More information about Movin' Out's development experience and the additional team members can be found at the end of this section.

### **OBTAINING AND UTILIZING FEDERAL, STATE, CITY AND OTHER FINANCING**

Movin' Out is uniquely qualified to obtain and use a variety of funding sources including, but not limited to, AHP, HOME, CDBG, TIF, Section 811, and Project-Based Section 8. We have participated in twelve Low Income Housing Tax Credit developments in Wisconsin. Movin' Out is fully qualified to maximize WHEDA's Developer Experience points and is also able to obtain additional team points due to its non-profit status. In addition, as a certified non-profit and CHDO we are able to utilize funding sources, such as HOME funds, to further leverage the affordable housing deals we work on.

### **PARTICIPATING IN PUBLIC/PRIVATE JOINT VENTURES**

Movin' Out focuses on developing affordable housing with many different partners, including public entities. We have worked with the City of Madison on multiple LIHTC developments in the last 5 years such as: The Royal, Pinney Lane Apartments, Maple Grove Apartments, and the recently funded Ace Apartments. At Movin' Out we find that our mission of providing affordable housing to individuals with a disability is a common need for many cities and towns allowing us to develop a working relationship with the communities to work together in meeting that demand for housing.



## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### STAFF QUALIFICATIONS

The Movin' Out Rental Development Team consists of senior level experts in managing complex housing and disability programs. They have significant professional experience and competencies in all the necessary areas to successfully develop and operate the proposed housing. Movin' Out, Inc.'s key development staff include Dave Porterfield and Megan Schuetz.

**Dave Porterfield**, Director of Real Estate Development, has nearly 30 years of affordable housing development experience. He has been involved with Movin' Out since its inception, providing a range of consulting and advisory services to the organization. Dave joined the staff nearly 12 years ago to lead Movin' Out's development projects. He has extensive experience with a wide range of financing programs including, but not limited to, HUD Section 811 and Section 42 Tax Credits.

**Megan Schuetz**, Real Estate Developer, joined Movin' Out in the summer of 2018, bringing over 12 years of real estate development experience from a for-profit developer in Wisconsin. She has worked on over 40 developments totaling more than \$400M. Megan is experienced in working on affordable housing in Wisconsin and specifically in Madison and Dane County.

In addition to the Rental Development Team, Movin' Out employs staff with deep experience in leadership, community engagement, program development and compliance, asset management, and housing counseling.

**Kathryne Auerback**, Executive Director, joined the organization in Spring 2018. She brings over 25 years of experience leading change for healthier and more equitable organizations and communities. She has managed numerous green building and other environmental and health-related enterprises. Her experience includes designing and leading a broad range of innovative community and economic development initiatives. Auerback earned her MA and MBA degrees from UW-Madison.

As the Asset Manager, **Mary Myers** has a key role in preserving and increasing the quality and sustainability of the properties Movin' Out reserves for low-income tenants with disabilities. She tracks the financial and operational performance of Movin' Out's housing portfolio, communicates with property management firms, and composes required reports to public and private agencies. As asset manager, Mary is also responsible for knowing and interacting with tenants, their supportive service teams, and guardians or family members. She has extensive training in numerous aspects of asset and property management.

**Amy Kallas**, Associate Director, began her work at Movin' Out as a Housing Counselor and later moved into the role of Program Compliance Manager, managing operations, grant writing, and reporting. She was promoted to Associate Director in 2017. Amy holds a degree in Psychology from the UW-Stevens Point. Prior to joining Movin' Out Amy worked at various human services agencies in direct services, support coordination, and management.

**Sara Hurley** has been a HUD-certified Housing Counselor with Movin' Out since 2014. She has over 20 years of case management experience working with adults with development/intellectual and physical disabilities.





## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

**Paula Tiffany** has been employed as a HUD-certified Housing Counselor at Movin' Out, Inc. since 2001. Prior to working at Movin' Out, Paula worked for 10 years with children with developmental disabilities and mental health issues. She also provided case management services to people with disabilities. Paula is a graduate of UW-Madison.

**Rebecca Wiese** has been a HUD-certified Housing Counselor with Movin' Out for over 10 years. She previously worked for many years helping people with developmental disabilities to find jobs. Rebecca earned her degree in Social Work from UW-Oshkosh.

## FINANCIAL CAPACITY

Movin' Out is a unique non-profit in that it operates on income generated through its work and does not rely on fundraising to operate. In our over 25 years in business, we have never had a foreclosure, have never defaulted, and have never had the general partner replaced by the investor.

Movin' Out has confirmed with various debt and equity sources that our liquid assets and net worth are sufficient to provide the required guarantees necessary to complete tax credit developments. We have extensive experience in working with a variety of lenders and investors. These references are available upon request. Financial statements are also available upon request.

## EXPERIENCE WITH INTEGRATED SUPPORT HOUSING

Movin' Out was founded under the premise of providing integrated housing opportunities for individuals with disabilities. For over twenty years Movin' Out has focused its mission on establishing relationships and advocating for these individuals to ensure they have access to housing options. Specifically, in the last decade we have focused on developing multi-family housing with no more than 25% of the total units targeted to households where one member has a disability.

It is important to recognize that the WHEDA tax credit program provides access to a valuable source of financing. It is distributed through a highly competitive process which requires developers to compete for an award by committing to plan and operate the project in specific ways in exchange for points awarded through the application process. Movin' Out has worked closely with WHEDA to help shape Wisconsin's tax credit program to encourage this integrated supported housing model through the Integrated Supportive Housing points. The first project to include this approach is called Elven Sted which is located in Stoughton and was developed, owned, and operated by Movin' Out. That project served as a model for establishing this preference by WHEDA for this approach to providing supported housing in Wisconsin.

Other funding sources have started to recognize the substantial need for integrated supportive housing. Movin' Out has a wealth of experience in this area and brings real world, people-focused ideas and implementation approaches to every project it works on. To date, Movin' Out has developed over 250 units of integrated housing in almost 20 projects throughout Wisconsin.



## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### PROPERTY MANAGEMENT

Movin' Out is partnering with ACC Management on Red Caboose Apartments. ACC will play a critical role in the ongoing success of the project. While most property management firms take over when the project is complete, ACC is involved throughout the development process, providing valuable input to the design and development team on such issues as market-oriented amenities, desirable unit layouts and compliance-oriented design issues. ACC will market the property during construction and will manage all aspects of property management and programmatic compliance in the long term. Movin' Out has previous experience with ACC who has a well-established business in Wisconsin managing high-quality affordable housing projects.

ACC Management Group, Inc. is a full-service property management firm dedicated to providing professional results-oriented services to its clients. ACC currently operates over 70 properties and 4,000 apartments throughout Wisconsin, Illinois, and Iowa. ACC's exceptional team of multi-family leaders has a proven track record of excellence in management of affordable housing with various state and federal programs including, Section 42 Tax Credit, Section 8, and Section 515.

ACC Management Group has established a long history of extraordinary program compliance proven by superior ratings with state and federal agencies, such as WHEDA, IHDA, and HUD. This includes management of properties with and without supportive services. Many properties within their portfolio include apartments that are specifically set aside for veterans, persons with physical or mental disabilities, age restrictions, and other designations. They often work hand-in-hand with an organization, such as Movin' Out, to place qualifying residents in these apartments. Additionally, many properties partner with a local organization to offer empowerment services such as courses on financial literacy and income tax preparation.

In addition to their extensive experience, ACC was selected for management of this project in part because they have an established tenant screening process specifically designed to carefully identify and accept tenants who may otherwise often have their application for housing denied through most traditional tenant screening practices. ACC uses a system that accounts for the most common reasons that applicants for housing are rejected by determining if a tenant will be accepted or denied using their normal screening process and then providing the applicant ways to overcome those issues through actions they may be able to take. For example, if the tenant is rejected, they have the ability to identify a co-signer or if appropriate, a protective payee and overcome the issues that would otherwise exclude them from becoming tenants.

Movin' Out has experience working with ACC on multiple affordable housing properties throughout Wisconsin including the Elven Sted Apartments. Elven Sted is a 33-unit property with an outstanding occupancy history and similar characteristics to Red Caboose Apartments including the use of Low Income Housing Tax Credits (LIHTC) as the primary funding source.



## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### ARCHITECTURAL/SERVICE/GREEN BUILDING AWARDS & CERTIFICATIONS

Knothe & Bruce (KBA) is an award-winning architecture and design firm in Madison, Wisconsin. They have experience in a wide range of projects – from multi-family, mixed use, historic renovations to modern mid-rise apartments, and from student housing to senior housing campuses. Regardless of the project or locale, they collaborate closely with our clients providing a full range of residential and commercial architectural services.

Since its founding in 1974 KBA has diligently pursued the best designs and the highest quality construction possible for all clients. They bring a vast amount of experience to each project that they do. Their 7 licensed architects and 8 staff professionals work with clients to enhance the design and function of the living environments they create. They design for the market, for future residents, and for the community, not for themselves. They understand the development realities such as public approvals, market demand, and construction cost. They embrace them in our program and design process.

KBA is a member of American Institute of Architects (AIA), US Green Building Council LEED, Construction Specification Institute, and Smart Growth Madison.

KBA has been awarded multiple design awards including the ABC Project of Distinction Award for Residential on multiple projects, The Daily Reporter Top Project multiple times, WMA Excellency in Masonry, Design Assistance Program Award Focus on Energy, and ABC Project of Distinction Gold Award for Green Building Practices – just to name a few.

### ORGANIZATIONAL CHART

See attached organization chart for the proposed project. Movin' Out will serve as the sole member of the Managing Member entity. In addition, Movin' Out is a certified CHDO in the City of Madison.

### MOVIN' OUT DEVELOPMENT EXPERIENCE

#### *Board of Directors* As of April 18, 2019

<b>Lisa Barwinski</b> AVP Associated Bank	<b>Jean MacCubbin</b> Retired, WI Dept. of Safety and Professional Services	<b>Sinikka Santala</b> Retired, Wisconsin Department of Health Services
<b>Jake Johnson</b> Owner/Producer Paradyme Productions	<b>Russ Endres</b> President, Wisconsin Management Company, Inc.	<b>Edward Erwin</b> UW-Madison School of Social Work
<b>Cheryl Schiltz</b> Movin' Out homeowner, disability advocate & photographer	<b>Peter Wilson</b> Director of Administrative Services DeForest Area School District	<b>Karyn Knaak</b> Manager, Business Development Cinnaire
<b>Sariah Daine</b>	<b>Valerie Brown</b>	<b>Georgia Allen</b>

## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

Commissioner and Vice-Chair Madison Community Development Authority	Disability and housing advocate; MOI homeowner	Founder & Executive Director, Soaring Independent Cooperative
<b>David Scribbins</b> Movin' Out Client and Disability Advocacy Leadership	<b>Abigail Tessmann</b> Transit2Go! And Advocacy Leadership	

### Pinney Lane Apartments

902-914 Royster Oaks Dr., Madison, WI 53714



Pinney Lane Apartments is a newly constructed, 70-unit, three-story, multifamily rental housing development located near the intersection of Cottage Grove and Dempsey Roads on Madison's East side. The project opened in 2015. Pinney Lane meets an increasing need for affordable housing that integrates housing options for people with disabilities within the community. The housing is a mixed-income project with 59 units reserved for household with incomes below 60% of median of the Dane County Area Median Income. The remaining eleven units being rented to households with incomes below 80% AMI. Through affirmative fair housing marketing efforts Movin' Out targets 18 units to individuals with disabilities. The project was financed with WHEDA 9% tax credit equity, City of Madison Housing Trust Fund, City of Madison HOME funding and Federal Home Loan Bank of Chicago Affordable Housing Program funds as well as 8 project based Section 8 vouchers provided by the City of Madison CDA. It is part of a larger mixed-use redevelopment plan for the 28+ acre Royster Clark site that also includes the new City of Madison Public Library branch. This project was a joint venture between Movin' Out, Inc. and Stone House Development.



## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### Elven Sted Apartments 831 Eighth Street Stoughton, WI



Elven Sted (River Place in Norwegian) is a 33-unit affordable rental project of new construction in a redevelopment area in Stoughton WI. Thirty-two of the units are tax credit set-aside units and one 3-bedroom unit is market rate. It is multi-family, mixed income community with units at 50%, 60%, and 80% CMI. The mix of 4 one-bedroom, 17 two-bedroom, and 12 three-bedroom units provide much needed affordable, accessible workforce housing as identified by local officials and community groups in Stoughton. Elven Sted serves both households that include people with disabilities and low-income workers, some of whom provide direct support/ residential services for disabled residents in Stoughton. These households benefit from having more affordable housing and living in close proximity to those they support. The site fronts on the Yahara River and is located in the central area of the City of Stoughton on a site at the south end of 8th Street. The site is approximately 2.5 acres in total. The site is located within the boundaries of a redevelopment area called the Rail Corridor Tax Increment District #5. Financing for Elven Sted included tax credit financing combined with Dane County HOME funds, state brownfield funding, and local TIF, combined with long term debt financing.

## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### The Royal

2232 W. Broadway, Madison, WI 53713



**Description:** The Royal apartment project is a joint venture developed by Movin' Out and Mirus Partners. The project will open in November of 2018. The 48-unit mixed-use, multifamily project includes underground and surface parking and approximately 3,000 square feet of ground floor commercial space, a community room, and leasing office. There is also open green space and playground area. The project is comprised of 4 one-bedroom apartment units, 32 two-bedroom apartment units and 12 three-bedroom apartment units designed for family occupancy. The building is constructed to meet Wisconsin Green-Built Home standards. Through affirmative fair housing marketing efforts Movin' Out targets 12 units to individuals with disabilities. The project was financed with WHEDA 9% tax credit equity, City of Madison Housing Trust Fund, City of Madison HOME funding, Dane County Affordable Housing Funds, and Federal Home Loan Bank of Chicago Affordable Housing Program funds.

### **The Ruxton – Platteville, WI**

71 units of mixed-income Section 42 apartments in a mixed-use property in Platteville completed in partnership with General Capital. The project includes 15 units of integrated supportive housing.

### **Pioneer Ridge Apartments - Wisconsin Dells, WI**

18 units of integrated supported housing integrated into a 72-unit mixed-income Section 42 financed project located in the Northeast section of Wisconsin Dells. This project is a joint venture with Mirus Partners.

### **Madison and Main - Waunakee, WI**

10 units of supported housing integrated into a newly constructed 78-unit market rate, mixed-use project in downtown Waunakee, Wisconsin. Movin' Out partnered with CBH, LLC, a partnership of local business people from Waunakee, to plan and develop this innovative project.



## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### **Berkshire Greendale - Greendale, WI**

11 units of affordable rental housing for seniors with permanent disabilities as part of a 90-unit independent senior housing project which Movin' Out did in partnership with General Capital Group. The project is financed with a combination of Section 42 tax credits and federal HOME funding.

### **Bradley Crossing - Brown Deer, WI**

11-unit affordable rental housing project targeted for families who have family members with permanent disabilities which is part of a 60-unit Section 42 financed supportive housing project. Movin' Out completed this project in partnership with Jewish Family Services and General Capital Group.

### **Globe Apartments - Watertown, WI**

11 units of supported housing integrated into a 48-unit Section 42 tax credit project located in downtown Watertown, WI. Movin' Out carried out this project in partnership with Mirus Partners and Horizon Development and Construction.

### **Harbor House - Madison, WI**

11-unit affordable rental project integrated within a 240-unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding

### **Middleton Senior Apartments - Middleton, WI**

8 units of affordable rental housing project for seniors with permanent disabilities as part of a 56-unit independent senior housing project in which Movin' Out partnered with MSP Inc. The project is financed with a combination of Section 42 tax credits and federal HOME funding.

### **Maple Grove Commons - Madison, WI**

20 units of supported housing integrated into a 78 unit mixed-income Section 42 financed project located on McKee Road in Southwest Madison as a joint venture with Oakbrook Corporation.

### **Monroe Street Apartments - Waterloo, WI**

8 units of supported housing integrated into a 24-unit, mixed-income Section 42 project carried out as a joint venture with Mirus Partners and located in downtown Waterloo, WI, in Jefferson County.

### **New Berlin City Center - New Berlin, WI**

102-unit affordable rental housing project for families with 11 units reserved for tenants who have family members with permanent disabilities. This project was developed in partnership with MSP Inc. The project is financed with a combination of section 42 tax credits and federal HOME funding.

### **North Lawn Avenue - Madison, WI**

Redevelopment of existing older single-family home into a fully accessible rental duplex.

### **North Port - Glendale, WI**

10-unit affordable rental project integrated within a 40-unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding.

### **Shawano Duplex - Shawano, WI**

Construction of a fully accessible rental duplex.



## DEVELOPMENT TEAM EXPERIENCE & CAPACITY

### **Stonebridge - Madison, WI**

12-unit affordable rental project integrated within a 300-unit owner occupied condominium project that utilized a combination of Federal Section 811 and HOME funding.

### **West Bend - West Bend, WI**

Acquisition and rehabilitation of a fully accessible rental duplex.

## OTHER TEAM MEMBERS

### **URBAN ASSETS**

Urban Assets delivers urban planning, project management and community engagement consulting services for planning and development initiatives. As part of the development team they will assist in working with the neighborhood, elected officials and city staff to plan the project and secure the required entitlements to allow the project to be constructed.

### **SVA ACCOUNTING**

SVA Certified Public Accountants will guide the development team through the tax credit application and allocation process. SVA has been the accountant of record for over 65% of all tax credits issued in the State of Wisconsin. Their expertise starts during the development process with guidance on deal structure, equity pricing and accounting compliance. SVA will serve as the project's ongoing accountant and financial advisor.

### **FOLEY AND LARDNER**

Foley and Lardner will serve as legal advisors to the development team, providing comprehensive counsel during all phases of the project. During the pre-development phase, the firm will provide counsel and oversight for land acquisition and entitlements. They will also provide guidance to ensure the appropriate ownership structure falls under the tax credit program. The firm will be involved throughout the process to provide counsel regarding contracts, development agreements and guarantees.

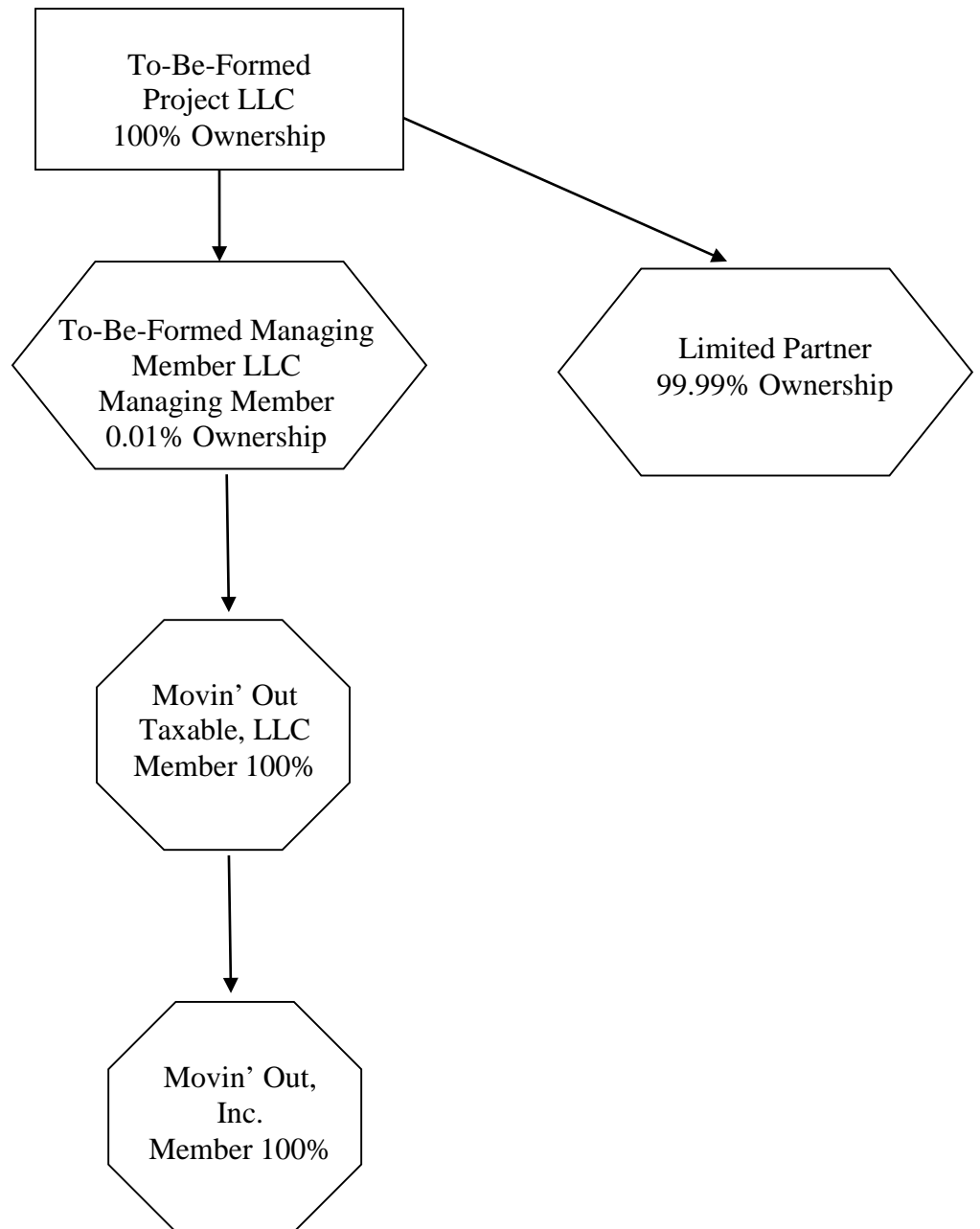
### **RED CABOOSE CHILD CARE CENTER**

While not officially part of the residential development's team the Red Caboose Child Care Center Staff, board of directors and participant families are an important part of this project. The stakeholders of Red Caboose Child Care will be integrally involved in the planning and ongoing operations of the project once completed.

Established in 1972, the center is the oldest independent child care center in Madison. It is a non-profit corporation dedicated to providing high quality child care and education dedicated to serving all children, including those with special educational, emotional and physical needs. They utilize a sliding-fee schedule for tuition based on family size and income. Over 20% of the children qualify for free or reduced meals through the Federal Child and Adult Care Food Program. The mission of Red Caboose and Movin' Out are highly aligned which offers the opportunity to increase the social impact of this unique and valuable partnership.



## ORGANIZATIONAL CHART



# **Movin' Out**

## **Supportive Services Plan**

### **For**

## **Red Caboose Apartments**

The Red Caboose Apartments will provide 8 units of supported housing which will be targeted for and affirmatively marketed to income qualified households with a range of support service needs. Qualified households include households with one or more family members served by the Long-Term Care System (people with physical and developmental disabilities and elderly); the Dane County mental health service system; the Dane County Children's Long-Term Support system; the Dane County Veteran's supportive services system and the Dane County Homeless Consortium supportive services system. There is a wide array of services available under each of these systems. Each of these service providing systems has long and extensive experience in their respective areas and provides support to several thousand people in Dane County each year.

With over 25 years of experience, Movin' Out has established working relationships with each of these systems to both receive referrals for those seeking permanent housing that is linked with their supportive services as well as coordinating with these systems to help these residents to successfully maintain their housing. Attached to the application are executed Memorandums of Understanding (MOUs) between Movin' Out and agencies actively working in each of these systems to reserves up to 8 of the project units. Residents of the Red Caboose Apartments will be made aware of these services by Movin' Out and the property manager who will refer those interested in accessing these service systems to the appropriate contacts. The supported housing units will be marketed on a first-come, first-served basis to qualified residents. It is important to note that in many cases the households seeking supported housing are often served by more than one of the systems described below.

### **Movin' Out Community Impact Program**

To support of these integrated supported housing units, Movin' Out also directly staffs and operates a program called the Community Impact Program (CIP). CIP is designed to both help coordinate services as well as to create and strengthen connections between all residents in the development and the surrounding community. Our Community Impact Program goals are to help the residents in all of our rental housing be successful as tenants and as full citizens. We view our rental communities as social platforms for both the residents and the surrounding neighborhoods empowering them to strive to reach their full potential. The CIP is intended to provide the tools and connections to realize this goal. Specifically, the CIP staff establishes personal connections with the residents in our rental communities and assists in ensuring that they are connected to the larger community and, if desired, supportive services. Additionally, this program coordinates and provides a range of empowerment educational services such as financial literacy, assistance with income tax preparation, home ownership education and other informational sessions aimed at improving life skills. These services are funded in part by this project as is reflected in the project operating budget that includes an annual cost of \$10,000 and in part with earned income from Movin' Out's other program activities and are provided on site or other convenient locations as needed.

The supportive service descriptions below provide information regarding each of the third-party service systems and the key service providers that Movin' Out actively works with to both affirmatively market the units and to coordinate with during the resident's tenancy. It is important to note that the array of services systems briefly described below are often complex to navigate, each with their own rules and regulations, each administered in different ways by different levels of government. Often these systems are not well connected or coordinated with each other and often not coordinated or integrated with needed housing resources. Movin' Out's Community Impact Program is designed to overcome and address issues that may arise as a result of this and to help ensure retention of residents in their homes.



Movin' Out's approach to developing, owning and operating integrated supported housing is to provide the residents in these units with ready access to a wide range of coordinated support service systems they may need to be successful residents. Through our experience in operating integrated supported housing we have come to understand that people often need individualized support with access to a wide range of services. Sometimes those service needs overlap different service systems and often people's service needs change over time. Movin' Out's Community Impact Program is designed to assist in coordinating and navigating these issues. We have established linkages to the following supportive services systems to meet these needs.

**Adult Long-Term Care Support System** – This system provides individually tailored services to people with physical and/or developmental disabilities and frail elderly people. These services are paid for through Medicaid funds and, in Wisconsin are administered by a network of regional managed care organizations under a program called Family Care. The Managed Care Organizations (MCO's) contract with a range of different direct care service providers who together provide highly individualized services that are delivered both in their homes and in the community. Services are available on a regularly scheduled basis. These services include:

- helping to maintain good nutrition, hygiene and health;
- managing budgets and bill paying;
- establishing a domestic routine;
- establishing a safe environment and safe practices;
- providing quick response to emergencies;
- helping to maintain good relationships with housemates, neighbors, resident association members, friends, co-workers, and family members;
- monitoring and dispensing medication;
- assisting in securing employment including supported employment in the community;
- assisting in using public transportation;
- providing assistance with exercising responsibility, making choices, and providing direction and decision-making
- assisting with developing and implementing a service plan that reflects one's own needs and preferences.

Movin' Out has a Memorandum of Understanding with Care Wisconsin, one of the state authorized Family Care MCO's, who will provide referrals of prospective residents to the project and commits to providing the services listed above through its network of direct care service providers. Our primary contact at Care Wisconsin is Karen Hitchcock, Vice President, Member Experience. Additional information describing the services offered by Care Wisconsin is included with the attached MOU (Exhibit 1) between Movin' Out and Care Wisconsin.

**Children's' Long-Term Care Support System** - The Children's Long-Term Support (CLTS) Program is a Home and Community-Based Service (HCBS) program that provides Medicaid funding for children who have substantial limitations in their daily activities and need support to remain in their home or community. Eligible children include those with developmental disabilities, severe emotional disturbances, and physical disabilities. Funding can be used to support a range of different services based on an assessment of the needs of the child and his or her family. Examples of these services are respite services for primary care givers (parents); case management; home modifications and supportive home care. Movin' Out works with families who have children with disabilities and are supported by this system. In many cases, families in this situation are supported to assist one another through peer support efforts. Having access to stable and affordable housing in proximity to employment and services is an important factor in assisting these families to support and nurture their children. In Dane County, these services are administered by Dane County Department of Human Services. These services are provided both in people's homes or in the community depending on the nature of the service. Movin' Out has a Memorandum of Understanding (Exhibit 2) with Dane County who will provide referrals of prospective residents to the project and commits to providing the

services listed above through its network of direct care service providers. Our primary contact with Dane County CLTS program is Monica Bear.

**Mental Health Services** – In Dane County, mental health services are provided by the Dane County Department of Human Services and are provided for both adults and children. These services are paid for through a combination of Federal Medicaid, State and County funding. The services offered are provided both in people's homes and in the community depending on the type of service. There are an array of community support and case management services provided to help people with mental illnesses thrive in a community setting. There are two primary Mental Health programs offered by Dane County. One way these supports are provided is through the Community Support Program, or CSP. A CSP is a coordinated care and treatment program which provides a range of treatment, rehabilitation, and support services through an identified treatment program and staff to ensure ongoing therapeutic involvement, individualized treatment, rehabilitation, and support services. They provide comprehensive services and staff outreach to people living in the community. Almost all of the services (medications, case management, work services, counseling, activities of daily living, ongoing problem solving, etc.) are provided through interdisciplinary teams within these programs. All people being considered for treatment in these programs must have a serious and persistent mental illness.

The second primary service delivery program is called the Comprehensive Community Services Program (CCS). This program provides case management and what the County calls, an "open provider network". This means that the client, together with their case manager, determines the type and source of services they will receive from an array of different contracted providers. In addition to these primary service delivery systems, the Dane County Mental Health System offers a number of other programs through various contracts with other community based providers that supplement the support service needs for the County. Included with the attached MOU is a Mental Health System chart that lists the full range of services offered.

Movin Out has a Memorandum of Understanding (Exhibit 3) with Dane County Department of Human Services who will provide referrals of prospective residents to the project and commits to providing the services listed above through its network of direct care service providers. Our primary contacts at Dane County Mental Health are Julie Meister and Carrie Simon.

**Veterans Service** - The Dane County Veterans Service Office is the point of contact in Dane County for veterans seeking various services. Their mission is to assist veterans and their families with obtaining local, state and federal benefits. Assistance includes helping them discover the benefits to which they are entitled and assist them with the application process. They provide access to a range of benefits that include veteran specific counseling, assistance with paying for housing costs and medical care. These services are primarily provided off-site at various locations depending on the nature of the service. Movin Out has a Memorandum of Understanding (Exhibit 4) with the Dane County Veterans Service Office who will provide referrals of prospective residents to the project and provides veterans with access to a wide range of veteran specific services through a variety of veteran benefit programs. Dan Connery is our primary contact person at the Dane County Veterans' Service Office.

**Homeless Services** - In Dane County, homeless services are coordinated through the Homeless Services Consortium of Dane County which is a partnership of agencies, funders, advocates, and formerly homeless persons committed to preventing and ending homelessness. This system provides a wide array of services to assist families and individuals experiencing homelessness to address their housing and service needs. Many of these service providing agencies also coordinate with the service systems described above. Some of them also own and operate housing themselves while others assist people to access housing in the community. Several of these providers focus on specific household types such as families with children, single men or single women. The services they provide include case management and coordination with a range of other services providers. Their services are provided on site. Movin' Out is currently working with The Road Home which focuses on families with children to identify a plan for this development. Movin' Out and The Road Home have mission alignment in that both groups have programs that focus on households with a family member that has a disability. It would be this market that we would serve at Red Caboose Apartments. Their services are funded primarily through contracts and by local funding sources. They are interested in providing referrals of prospective residents to the project and providing the services needed to support their clients in the project. We are currently working with The Road Home to structure a program that allows a way to meet everyone's priorities and needs. We hope to finalize an agreement in the next 30-60 days. Our primary contact with The Road Home is Kristin Rucinski.

## **Exhibit 1**

### **Red Caboose Apartments Housing Plan for Tenants with Special Needs**

#### **Memorandum of Understanding**

This memorandum of understanding is an understanding between Care Wisconsin's Family Care and Partnership programs and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider, and represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

#### **Services Offered:**

1. Movin' Out will reserve up to 8 of 38 units of the residential rental units in its Red Caboose Apartment development in Madison for tenant households that include at least one tenant with disabilities who relies on supportive services coordinated and funded by Care Wisconsin's Family Care and Partnership programs. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 8 of the units will be people with cognitive, mental, behavioral, and physical disabilities who are members of Care Wisconsin's Family Care and/or Partnership programs, live in Dane County and who are referred by Care Wisconsin care teams. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Care Wisconsin care teams.
3. Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:
  - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
  - b. Tenants with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in 38 units, 8 of which will be supported housing units.
  - c. Tenants with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.

- d. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.
- 4. Care Wisconsin will provide comprehensive case management based upon individual tenant's assessed needs.
  - a. Tenants with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Care Wisconsin contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Care Wisconsin include needed support, available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.
- 5. Care Wisconsin will coordinate providers to assist members with meeting their assessed needs. The tenants designated for supportive services will have Member Centered Plans. Services are determined based on the needs and desires of each person and their support team. Individuals have the right to direct their own services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective residents will be provided supports as identified in their individual Member Centered Plan. These supports may include:
  - a. Financial Management: Care Wisconsin will assess needs, preference, and aptitudes for increasing economic self-sufficiency. Care Wisconsin members may be eligible for vocational services or adult day services. Employment and career counseling may provide planning assistance in achieving employment by connecting enrolled members to community resources, providing career exploration, and performing informational interviewing with professionals and employers. Vocational services can address barriers to employment by connecting tenants to a Benefits Specialist who will explain how employment will affect benefits and what work incentives are available. Members may have access to assistive technology consultation. Assistive technology services can help a person with a disability in the selection, purchase, and/or use of tools designed to make his or her life easier or more independent. Financial literacy training may be available to increase understanding and build good practices in handling money and credit.



- b. Supportive Home Care - Staff can support tenants in their homes and remotely to ensure safety and provide supervision as needed. Amounts of support range from the potential for 24 hours per day in some instances to come-in support a few hours each day or week.
- c. Self-Directed Services and Autonomy and Choice: providers chosen by tenants can ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.
- d. Relationships/Community Involvement: the supportive services provider can assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and may receive support to help in coordinating plans, help with maintaining relationships with friends and neighbors, and/or the coordination of transportation, as needed, to get to the right place at the right time.
- e. Organization/Communication: the supportive services provider staff may work cooperatively with individuals to plan and organize daily routines, including coordinating transportation, special events, communicating as needed with other service providers, care management team, and family members.
- f. Medication Assistance and Medical Advocacy: Staff may assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff can also attend medical appointments to assist individuals with communicating with medical providers and advocating on their behalf. Staff can work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are attended to promptly and appropriately. Staff can monitor the need for follow up appointments and maintain documentation of medical history.
- g. Personal Care: As assessed, Staff may assist the individuals with personal care including: bathing, hair care, tooth brushing, toileting, dressing, care of eyeglasses/hearing aids, assistance with mobility/ambulation, skin care, use of assistive devices and other necessary assistance.
- h. Home Maintenance: Staff may assist, to the degree necessary, with home maintenance including cleaning all areas of the apartments, organizing, laundry, and maintaining a safe home environment.
- i. Meal Planning/Groceries: The supportive services provider may assist with meal planning, nutrition education and grocery shopping for each individual, as needed. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services may also include education and/or guidance around special dietary requirements (e.g., diabetic diet) and healthy eating.

#### **How Services will be Planned and Funded**

The initial tenants are expected to be eligible for supportive services funded and coordinated by Care Wisconsin. Prospective tenants may choose to utilize a Care Wisconsin contracted agency or they may choose to self-direct the supports in their Member Centered Plan, as appropriate.

The Aging and Disability Resource Center of Dane County will offer prospective tenants with disabilities a central source of information, assistance and access to community resources for older people and people with disabilities, as well as their families. Personalized assistance is available at the resource center, over the telephone, or in visits to an individual's home.

Professional staff will assist adults to sort through options and make informed decisions.

***For Care Wisconsin:***

Karen Hitchcock  
Karen Hitchcock, VP External Affairs

June 25, 2019  
Date

***For Movin' Out, Inc.:***

Kathryne Auerback  
Kathryne Auerback , Executive Director

6-26-19  
Date



# Care Wisconsin: At A Glance

1 (800) 963-0035 | carewisc.org

## Mission & Values

To promote the quality of life of our communities by empowering others and working together to creatively solve unique health and long term care needs. To operate on a sustainable financial basis through growth and continuous improvement. Our culture is based on integrity, accountability and treating our members, partners and each other with dignity and respect.

### Family Care

Long-term care services and supports. Encourages independence and member choice.

8717

44 counties

### Medicaid SSI

Insurance for people who receive Supplemental Security Income and have Medicaid.

2894

36 counties

### Partnership

Long-term care services plus acute and primary health insurance for individuals with nursing-home level of care.

1934

8 counties

### DSNP

Special needs Medicare Advantage insurance plan provides Medicare Parts A, B & Part D to members.

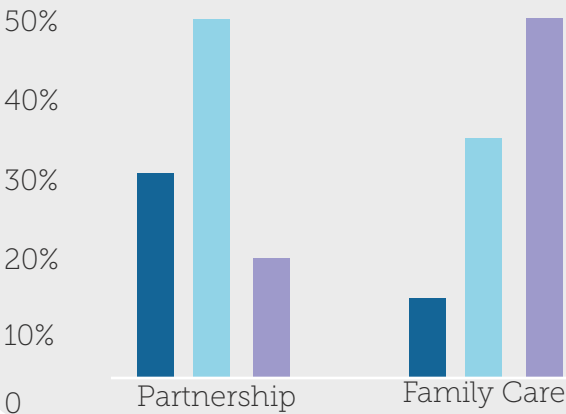
535

31 counties

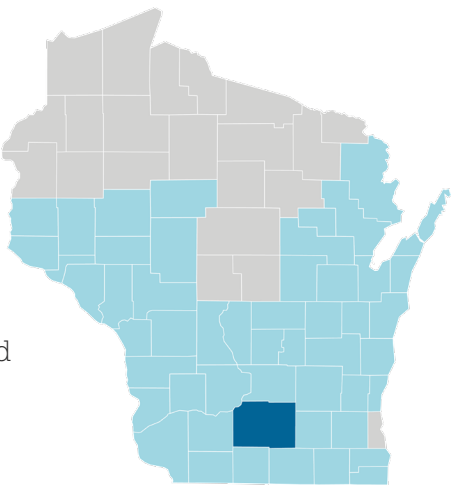
## Funded through Medicaid

## Funded through Medicaid & Medicare

### Populations Served in Dane County



- Intellectually / Developmentally Disabled
- Frail Elderly
- Physically Disabled

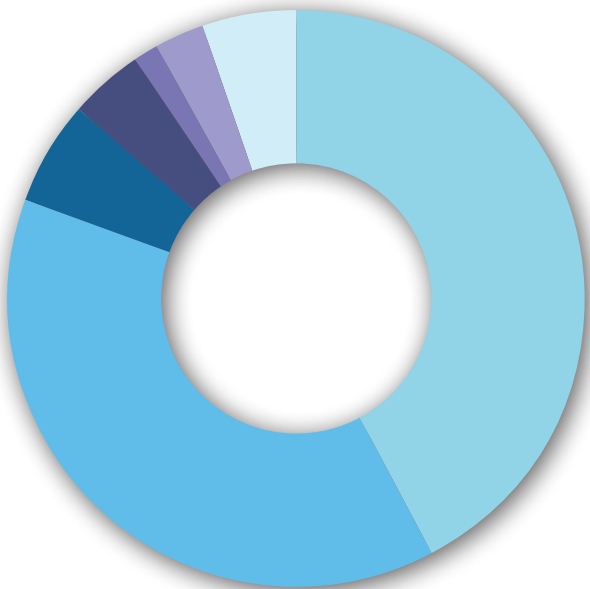


## Self-Directed Services

Over 2,000 Care Wisconsin members are in our Self-Directed Supports (SDS) program, which means they manage part or all of their services. We focus on each member's unique abilities and support their choices to improve outcomes.

## Integrated Employment

We have a team dedicated to finding employment opportunities for our members. More than 2000 members are gainfully employed, building their confidence and community contributions.



integrated community employment (929)

community based pre-vocational (130)

facility based pre-vocational (842)

work crew or enclave (88)

## Employees

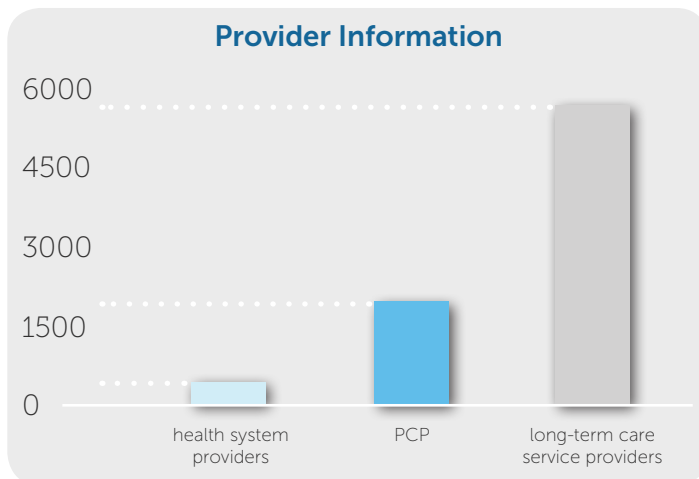
Our employees live and work in 52 Wisconsin counties. This "local" presence enables our staff to develop a deep understanding of their community needs. Beyond work hours, our staff are active volunteers, investing thousands of personal hours to their communities. Turnover at Care Wisconsin is low. We have employees regularly celebrating five, 10, and even 20 year anniversaries with our organization.



Care Wisconsin received an overall rating of 5 out of 5 stars by the Centers for Medicare and Medicaid Services for the 2019 plan year. This rating includes performance for Medicare Parts C & D. For more information on CMS' Star Ratings, visit [www.medicare.gov](http://www.medicare.gov).

## Providers

Our provider network includes a mix of acute, primary, and long-term care supports. We manage more than 10,000 active provider contracts.



trial work experience (33)

unsure / other employment (127)

self-employed (46)

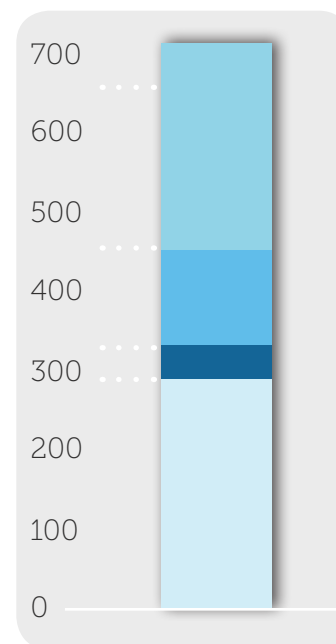
## Employee Information

employees statewide (720)

care staff (450)

employees in Dane County (332)

administrative staff (270)





# Who is Care Wisconsin?

## What do we do?

Care Wisconsin is a nonprofit organization that matches frail seniors and adults with physical or intellectual/developmental disabilities to the health and long-term care services they need. We help our members live as independently as possible.

We focus on member-centered care by helping our members develop their own care plans using cost-effective services and care coordination.

## Our Mission

To promote the quality of life in our communities by empowering others and working together to creatively solve unique health and long-term care needs.



# Contact Us

## We're here to help you!

To learn more about the Family Care Program contact your local ADRC!

Your Aging and Disability Resource Center (ADRC)

[LABEL GOES HERE]

## Your Local Care Wisconsin Office

[LABEL GOES HERE]



### Visit

[carewisc.org/family-care/](http://carewisc.org/family-care/)



### Call Toll-Free

1 (800) 963-0035 | TTY WI Relay 711

Interpreter and translation services are available free of charge. This document may be available in other forms upon request. If you have special needs, please call 1(800) 963-0035 for help. Family Care is a public program that provides long-term care services through the Wisconsin Department of Health Services. Care Wisconsin has a contract with Wisconsin Medicaid to offer Family Care and is a state- certified care management organization. Equal Opportunity Employer

CARE  
WISCONSIN®

# Family Care

The Family Care program helps frail elders & adults with disabilities manage their long-term care services.

*Caring starts here.*



# What is Family Care?

The Family Care program helps frail elders and adults with different accessibility needs manage their long-term care services. The program balances members' independence with the support they need in order to thrive.

As a Family Care member, you are at the center of your care team which includes a Care Manager and a Registered Nurse. Together they will assess your abilities and suggest the services to help you stay independent. From there, the team creates a plan just for you to support your long-term care needs.

”

My team is amazing. I always get follow ups... Fast, speedy, and informative; I am getting all the care I need.

- Real Member Quote

# What types of services could be a part of my care plan?

Your care plan includes services to help you manage your well-being. Here are a few examples of services that may be available to you:



**In Home Supports & Meaningful Day Activities**  
Home-delivered meals, personal cares & skilled nursing, adult day care and employment supports



**Transportation**  
Specialized transportation to your appointments



**Medical Equipment & Supplies**  
Walkers, blood sugar monitors, and oxygen equipment



**Skills Training**  
Daily living skills training and training services for unpaid caregivers



**Therapy Services**  
Counseling, physical therapy, occupational therapy, and speech and language pathology services

# Who is on my Care Team?

Your Care Team is here to assist you!



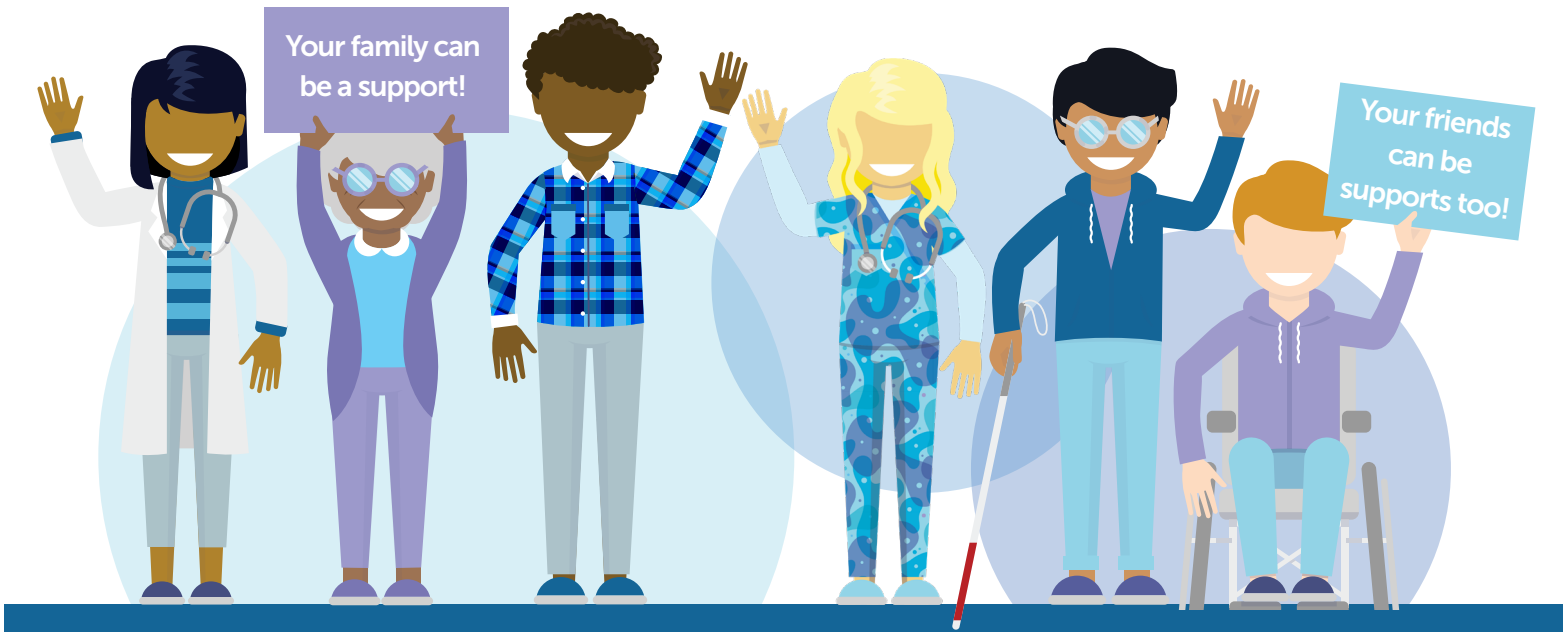
**You, the Member...**  
are the most important part of any care team! Your care manager and nurse will work with you to develop a plan that identifies what you can do to live as independently as possible. You will also discuss how you will work toward your goals and participate in continued check-ins with your care team. Together, the team will make sure your care plan is working, make changes if something isn't working, or adjust the plan to meet a new need.



**Your Care Manager...**  
gets to know you, your strengths and abilities, and learns what goals the Family Care program will help you achieve. Care Managers match you with services in the community that will be part of the care plan.



**Your Registered Nurse...**  
works with the Care Manager and you to develop the care plan focusing on identifying potential health concerns or needed healthcare providers. The nurse is the key contact for health-related issues.



# Am I Eligible to Join?

To see if you're eligible, contact your local ADRC. They will determine if you:



**Live in the Family Care service area**  
Family Care is offered in all Wisconsin counties. Care Wisconsin's Family Care is available in 44 counties.



**Meet age & disability requirements**

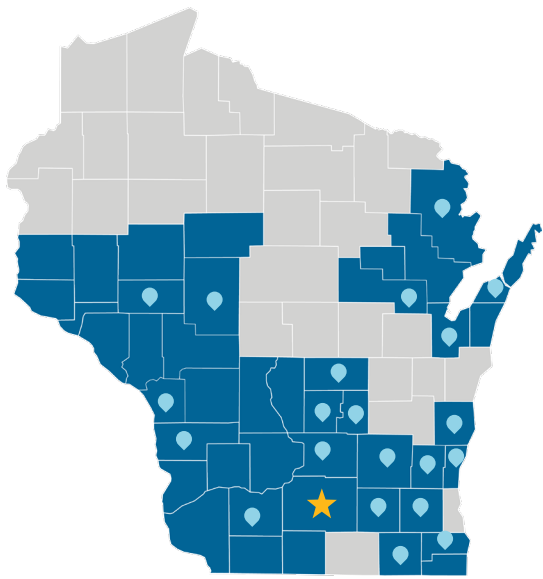
- 18 or older with physical disabilities
- 18 or older with intellectual or developmental disabilities
- Frail adults, age 65 or older



**Other factors that are considered**

- Income and asset limits
- Functional screen results

Care Wisconsin has 22 local offices across the state





# Competitive Integrated Employment



## Our Philosophy



All people want to feel connected to their communities and engage in meaningful work. Members of Care Wisconsin are no different. Through our Integrated Employment Program, our members can do just that!

## The Benefits



People who work experience a higher quality of life. Through work opportunities, people develop self-confidence and form relationships that put them on a path to better physical and mental health.

## Care Team



Our Care Teams support members in reaching their Competitive Integrated Employment goals. They make sure that members' unique skills and interests are matched to employment options in the community.



# Learn More About Competitive Integrated Employment Today!

”

This works for me because I have the support of my boss, my guardian & my care team.

*-Angie, Real Member*



”

I love interacting with people, working with guests & making them happy.

*-Nate, Real Member*



## Contact

Toll-Free: (800) 963-0035

TTY Relay 711

## To learn more visit:

[www.carewisc.org/member-employment](http://www.carewisc.org/member-employment)



Interpreter and translation services are available free of charge. This document may be available in other forms upon request. If you have special needs, please call 1 (800) 963-0035 for help.  
Equal Opportunity Employer.



## **Exhibit 2**

### **Red Caboose Apartments Housing Plan for Tenants with Special Needs**

#### **Memorandum of Understanding**

This memorandum of understanding is an understanding between Dane County Department of Human Services Children's Long-Term Support Program and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider and represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

#### **Services Offered:**

1. Movin' Out will reserve up to 8 of 38 units of the residential rental units in its Red Caboose Apartment development in the City of Madison, Wisconsin for tenant households that include at least one child with disabilities who relies on supportive services coordinated and funded by Dane County Department of Human Services Children's Long-Term Support Program. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 8 of the units will be families with children with, developmental, physical, or severe emotional disabilities who are clients of Dane County Department of Human Services Children's Long-Term Support Service, live in Dane County and who are referred by Dane County Department of Human Services Children's Long-Term Support Program. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County Department of Human Services Children's Long-Term Support Program staff or their contracted direct service providers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants with children who rely on supportive services:
  - a. Tenants with children with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
  - b. Tenants with children with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in 38 units, 8 of which will be supported housing units.
  - c. Tenants with children with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require

- d. Tenants with children with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units built to accommodate the needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.
- 4. Dane County Department of Human Services Children's Long-Term Support Program will provide comprehensive case management based upon individual family's children's assessed needs.
  - a. Tenants with children with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Dane County Department of Human Services Children's Long-Term Support Program contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Dane County Department of Human Services Children's Long-Term Support Program include needed respite for parents as well as support, available in tenants' homes, to teach or maintain good nutrition, hygiene and health, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, help in figuring out how to get to school and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to school, appointments, and other commitments on time and prepared.
- 5. Dane County Department of Human Services Children's Long-Term Support Program will coordinate providers to assist families with meeting their child's assessed needs. The tenants with children designated for supportive services will have individualized plans. Services are determined based on the needs and desires of the family and their support team. Families have the right to direct their own services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective resident children served by Dane County will be provided supports as identified in their individualized plan. These supports may include: respite, daily living skills, consumer education, training for unpaid caregivers (parents) and community integration services. All CLTS children have a support and service coordinator (case manager) who coordinates their plan and works with them to access the services they need.

#### **How Services will be Planned and Funded**

The proposed tenants may receive community-based supportive services for their child funded and coordinated by Dane County Department of Human Services Children's Long-Term Support Program based upon individual needs. Each tenant's child has a case manager who assists the tenant in creating

an individualized plan, accessing and coordinating needed supports based upon the child's identified needs and desired outcomes. The Dane County Department of Human Services

*For Dane County Department of Human Services*

*Children's Long-Term Support Program:*

*For Movin' Out, Inc.:*

Monica Bea  
Dane County Community Services Manager  
Disability Services  
6-25-19  
Date

Kathryne Auerback  
Kathryne Auerback, Executive Director  
6-26-19  
Date

## Intellectual and Developmental Disabilities

### Children's Long-Term Support

Wisconsin's Children's Long-Term Support (CLTS) Waiver Program (including the Katie Beckett Program and the Children's Community Options Program) makes Medicaid funding available to support children with substantial limitations due to developmental, physical, or severe emotional disabilities who are living at home or in the community. Funding can be used to support a range of services based on an assessment of the needs of the child and his or her family.

The CLTS waiver is available to children and youth under the age of 22 who have a diagnosis of an intellectual and/or developmental disability, physical disability, and/or mental health disability. To receive services in Dane County, a child must be living in Dane County and be eligible for Medicaid. A child/youth must also be found eligible by meeting a level of care that is typically provided in a setting such as a hospital, nursing home, or institution for people with developmental disabilities. A screening tool known as the Functional Screen is used to determine a person's level of care.

There are a broad range of services offered through the CLTS Waiver Program to meet the needs and goals of your child and your family. Each plan is individualized and a CLTS case manager will work with children and their families to identify needs and goals that will help a child be an active participant in their home and community. In addition to a case manager some examples of possible services include:

- Adaptive aids
- Communication aids
- Daily living skills training
- Respite
- Home modifications
- Supportive home care

Dane County contracts with [CompassWisconsin: Threshold](#) to provide a unified point for intake, application, and eligibility determination for Wisconsin's CLTS programs. To speak with one of Dane County's CompassWisconsin: Threshold consultants, please call [\(608\) 288-9808](#).

After CompassWisconsin: Threshold completes their assessment, including the functional screen; the State of Wisconsin Department of Health Services will review the screen and eligibility and then send you a letter confirming if your child is eligible. Your child's eligibility information will also be sent to Dane County Human Services, who in turn will assign your child to a CLTS case management agency. In addition to Dane County Human Services CLTS unit, the county contracts with two additional agencies that provide a CLTS case management services. A CLTS Case Manager will reach out to the parents or guardian directly to start the process of receiving CLTS waiver services and supports.

IDD
General Information
Services
Birth to 3 Program
Children's Long-Term Support
Key Phone Numbers

### **Exhibit 3**

#### **Red Caboose Apartments Housing Plan for Tenants with Special Needs**

##### **Memorandum of Understanding**

This memorandum of understanding is an understanding between Dane County Department of Human Services Adult Mental Health Services and Movin' Out, Inc. (Movin' Out), the affordable rental housing provider and represents the agreement of the two parties on the delivery of housing and services that will enhance independent living success and promote the dignity and independence of the tenants receiving supportive services.

##### **Services Offered:**

1. Movin' Out will reserve up to 8 of 38 units of the residential rental units in its Red Caboose Apartment development in Madison for tenant households that include at least one tenant with disabilities who relies on supportive services coordinated and funded by Dane County Department of Human Services Adult Mental Health Services. Movin' Out commits to accommodate the delivery of supportive services for the life of the project.
2. The initial pool of tenants for up to 8 of the units will be people with mental and behavioral disabilities who are clients of Dane County Department of Human Services Adult Mental Health Service, live in Dane County and who are referred by Dane County Department of Human Services Adult Mental Health Services. Final determination of who will be selected as initial tenants will be made by Movin' Out or the professional property management company designated by Movin' Out, with recommendations from Dane County Department of Human Services Adult Mental Health Services staff or their contracted direct service providers.
3. Movin' Out will provide services and amenities to meet the following needs of tenants who rely on supportive services:
  - a. Tenants with disabilities need stable housing: Movin' Out provides housing that assures tenancy over the long term. The tenant lease is renewable, subject to compliance with lease terms.
  - b. Tenants with disabilities need affordable housing: Movin' Out provides decent shelter at a rent affordable to tenants on a fixed income. The owner's non-profit status and the sources of development funding assure continuous affordability for qualified tenants in 38 units, 8 of which will be supported housing units.
  - c. Tenants with disabilities need disability-sensitive property management. Movin' Out's property management is tailored to tenants whose disabilities may require individualized accommodations. Property management will coordinate with and complement day to day supportive services.
  - d. Tenants with disabilities need ordinary housing in typical neighborhoods that will not separate and segregate them from other citizens. Movin' Out will develop housing units

built to accommodate the needs and preferences of the tenants. The housing will not be burdened with licensing required by congregate facilities, thus allowing the tenants to be seen and known as ordinary neighbors.

4. Dane County Department of Human Services Adult Mental Health Services will provide comprehensive case management based upon individual tenant's assessed needs.
  - a. Tenants with disabilities may need individualized in-home support services available on a regularly scheduled basis and/or on short notice. Dane County Department of Human Services Adult Mental Health Services contracts with providers to support the identified and assessed needs of each individual member. Services that may be supported by Dane County Department of Human Services Adult Mental Health Services include needed support, available in tenants' homes, to maintain good nutrition, hygiene and health, manage budgets and bills, establish a domestic routine, establish a safe environment and safe practices, provide quick response to emergencies, help to maintain good relationships with housemates and neighbors, monitor and dispense medication, help in figuring out how to get to work and social destinations using public transportation, and coordination of domestic routines and schedules to insure people get to work, appointments, and other commitments on time and prepared.
5. Dane County Department of Human Services Adult Mental Health Services will coordinate providers to assist members with meeting their assessed needs. The tenants designated for supportive services will have individualized plans. Services are determined based on the needs and desires of each person and their support team. Individuals have the right to direct their own services as appropriate, including choosing their caregivers and service providers. For the purpose of this project, prospective residents will be provided supports as identified in their individualized plan. These supports may include:
  - a. Financial Management: Dane County Department of Human Services Adult Mental Health Services will assess needs, preference, and aptitudes for increasing economic self-sufficiency. Dane County Department of Human Services Adult Mental Health Services members may be eligible for vocational services. Employment and career counseling may provide planning assistance in achieving employment by connecting enrolled members to community resources, providing career exploration, and performing informational interviewing with professionals and employers. Vocational services can address barriers to employment by connecting tenants to a Benefits Specialist who will explain how employment will affect benefits and what work incentives are available. Financial literacy training may be available to increase understanding and build good practices in handling money and credit.
  - b. Self-Directed Services: Autonomy and Choice: providers chosen by tenants can ensure that individuals have choice about where and with whom they live, how personal time is used and what services are received.

- c. Relationships/Community Involvement: the supportive services provider can assist with opportunities to develop and maintain relationships with friends, family and community members. Individuals will have opportunities to participate in community life and may receive support to help in coordinating plans, help with maintaining relationships with friends and neighbors, and/or the coordination of transportation, as needed, to get to the right place at the right time.
- d. Organization/communication: the supportive services provider staff may work cooperatively with individuals to plan and organize daily routines, including coordinating transportation, special events, communicating as needed with other service providers, care management team, and family members.
- e. Medication assistance and medical advocacy: Staff may assist each person, as needed, with medication administration, ensuring accuracy and consistency of needed medications. Staff can also attend medical appointments to assist individuals with communicating with medical providers and advocating on their behalf. Staff can work with the individuals and their teams to ensure medical appointments are attended, when necessary, and that any medical issues that arise are attended to promptly and appropriately. Staff can monitor the need for follow up appointments and maintain documentation of medical history.
- f. Home maintenance: Staff may assist, to the degree necessary, with home maintenance including cleaning all areas of the apartments, organizing, laundry, and maintaining a safe home environment.
- g. Meal Planning/Groceries: The supportive services provider may assist with meal planning, nutrition education and grocery shopping for each individual, as needed. This may include planning weekly menus, making grocery store lists, providing transportation to the grocery store and assistance with purchasing groceries. Supportive services may also include education and/or guidance around special dietary requirements (e.g., diabetic diet) and healthy eating.

### **How Services will be Planned and Funded**

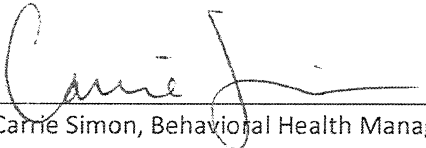
The proposed tenants may receive community-based supportive services funded and coordinated by Dane County Department of Human Services Adult Mental Health Services based upon individual needs. Each tenant has a Dane County Department of Human Services Adult Mental Health Services case manager who assists the tenant in creating an individualized plan based upon identified needs and desired outcomes. The Dane County Department of Human Services Adult Mental Health Services staff and identifies service providers will monitor and document the quality of supports delivered.

The Aging and Disability Resource Center of Dane County will offer prospective tenants with disabilities a central source of information, assistance and access to community resources for older people and people with disabilities, as well as their families. Personalized assistance is available at the resource center, over the telephone, or in visits to an individual's home.


Professional staff will assist adults to sort through options and make informed decisions.

*For Dane County Department of Human Services*

*Adult Mental Health Services:*

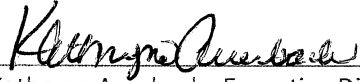
  
\_\_\_\_\_  
Carrie Simon, Behavioral Health Manager

6/25/19  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Julie Meister, Comprehensive Community Services Manager

6/27/19  
\_\_\_\_\_  
Date

*For Movin' Out, Inc.:*

  
\_\_\_\_\_  
Kathryne Auerbach, Executive Director

6-26-19  
\_\_\_\_\_  
Date



## Comprehensive Community Services (CCS)

Comprehensive Community Services, or CCS, is a program that provides mental health and substance use

services to people of all ages. The intent of CCS services is to assist people in identifying their personal goals and in working towards those goals at their own pace. In the CCS program ***you are in charge of your own recovery.***

## Who is Eligible for CCS?

CCS is available to adults and children who meet the following criteria:

- Dane County resident
- Eligible for Medical Assistance, BadgerCare, or another Medicaid program
- Have a mental health and/or substance use diagnosis
- Have a need for psychosocial rehabilitation services
- Eligible as determined by a Wisconsin Functional Screen

## What Can I Expect?

### Intake

You will talk with a CCS Intake Worker at Dane County Department of Human Services to discuss whether CCS is right for you. The Intake Worker will verify your insurance, assist you with obtaining a doctor's prescription for CCS services, and complete an interview with you to ensure that you are eligible for CCS. If you qualify for CCS Services and decide that CCS is right for you, the Intake Worker will help you connect with a Service Facilitator.

### Recovery Team

You and your Service Facilitator will work together to assess your strengths and needs. You and your Service Facilitator will also assemble a Recovery Team made up of people you identify and trust. Your Recovery Team will help you develop a recovery plan that outlines *your* goals on *your* path to recovery. Your Recovery Team will offer encouragement and problem solving assistance.

*On any journey,  
we must find out  
where we are  
before we can  
plan the first  
step.*

*-Kathy Boevink*

### CCS Services

Once you have developed a Recovery Plan in collaboration with your Recovery Team, your Service Facilitator will assist you with identifying the service providers you would like to enlist to provide the services you need. In many instances you will have the ability to choose from several available service providers. If you choose a provider and later would like a different provider, you can make that request. . . it is up to you!

*Growth is never by mere chance;  
It is the result of forces working  
together.*

*- James Cash Penney  
Founder JCPenney stores*

You may remain in CCS as long as you continue to meet the eligibility criteria and are working on your recovery goals. You can decide to withdraw from the CCS program at any time.

## CCS Values

CCS embraces many core values in its approach to the delivery of mental health and substance use services. CCS values include:

- Respect of client values—what is important to you?
- Inclusion of natural supports and family—who is important to you?
- Flexibility of services—what you need, when you need it.
- Community—services will be provided where you need and want them.
- Respect of client choice—it's up to you!

## How do I apply for CCS?

To obtain more information or apply for Comprehensive Community Services, please call Dane County Department of Human Services CCS Intake Workers:

CCS Services for Youth (under 18):  
(608) 283-1400

CCS Services for Adults (18 or older):  
(608) 242-6415

This brochure is also available in Spanish and Hmong. We will provide an interpreter if necessary.

Este folleto también está disponible en español y Hmong. Proporcionaremos un intérprete si es necesario.

Daim ntawv qhia no tseem muaj Mev thiab Hmoob. Peb yuav muab ib tug neeg txhais lus yog tias tsim nyog.

## 24-Hour Crisis Services

If you are experiencing a mental health crisis, Journey Mental Health Center provides 24-hour crisis services to all residents regardless of insurance.

**Contact Information:**  
**(608) 280-2600**

January 2017

# Comprehensive Community Services



***Your vision, your plan,  
your recovery!***

**1202 Northport Drive  
Madison WI 53704  
608-242-6415 (adults)  
608-283-1400 (youth)  
[www.danecountyhumanservices.org](http://www.danecountyhumanservices.org)**



Exhibit 4

**MEMORANDUM OF UNDERSTANDING**

THIS MEMORANDUM OF UNDERSTANDING (the "MOU") is made this 20th day June of, 2019 (the "Effective Date"), by and between the Dane County Veterans Service Office, and Movin' Out, Inc. ("Developer").

**WITNESSETH**

**WHEREAS**, the Developer is the developer/owner of the subject proposed 38-unit development named Red Caboose Apartments to be located at 2323 East Washington Avenue, Madison, WI.

**WHEREAS**, the Dane County Veterans Service Office is an organization which assists eligible veterans and their dependents in applying for state and federal veterans' benefits, and whose mission is to serve all veterans and their families, with dignity and compassion, by providing assistance in the preparation and submission of claims for benefits to which they may be entitled, and to serve as their principal advocate and link to services on veterans' related issues.

**WHEREAS**, the intent of this Memorandum is to confirm our mutual desire and commitment to initiate a collaborative relationship to ensure eligible veterans are aware of the availability of affordable housing units in this development, and establish communication to connect future low income residents with appropriate services and service providers.

**WHEREAS**, the Developer is seeking financial support from the Wisconsin Housing and Economic Development Authority through the Section 42 Low Income Housing Tax Credit Program (LIHTC).

**WHEREAS**, anticipating that the application will be well received by WHEDA, and hopeful that it will receive funding that will allow construction of the community, the Developer wishes to proactively establish an area referral network that includes the Dane County Veterans Service Office.

**NOW THEREFORE**, Developer and the Dane County Veterans Service Office agree:

- 1) The proposed project intends to provide 8 supportive housing units at rents affordable to those earning 30% of the area median income. The target population for the supportive housing units is veterans and the general population who have permanent developmental, physical, sensory, medical or mental health disabilities or a combination of impairments that make them eligible for long term care services.
- 2) Should the proposed project be developed, Developer and/or its property management agent will, during lease-up and whenever there is a vacant unit, contact your office and other area local partners asking for referrals of prospective residents who are low income and are veterans. This contact will be made by the Developer or their onsite management agent staff via email or phone.

- 3) The Developer's property management agent will establish a waiting list of prospective residents based on referrals described above.
- 4) The Developer and its property management agent will endeavor to make existing and prospective residents aware of services and resources available by provision of a tenant resource area within the common area of the proposed development. The tenant resource area will consist of contact information for the Dane County Veterans Service Office well as materials and brochures of the Dane County Aging and Disability Resource Center (ADRC), and other area collaborative partners. New residents will also receive a copy of the Dane County Veterans Service Office and ADRC brochure directly from the property manager at the time of lease signing. Our onsite management agent staff will be coached regarding "who and how" with regards to the Dane County Veterans Service Office and the ADRC to help connect residents to appropriate service networks.
- 5) The proposed project will not provide long term services, nor charge fees related to long term services to residents, but will rather refer residents who may be veterans to the Dane County Veterans Service Office in order to assist residents to locate the services and funding appropriate to their individual need.
- 6) Residents will not be required to receive any services in order to reside in the development. Residents that desire to receive services will have choice in service provider(s).
- 7) The Dane County Veterans Service Office acknowledges awareness of this proposed project, and a willingness to provide the Developer and their agents with brochures and other materials in order for Developer to make residents aware of services offered by the Dane County Veterans Service Office.

### **Administrative Provisions**

#### **Duration**

This MOU is subject to the project receiving an award of LIHTC, with operations expected to commence on or about July 1, 2021. The initial period shall be 12 months from commencement of leasing operations. Either party may terminate this agreement with 30 days' notice at the end of the initial period.

#### **Amendments**

This MOU may be amended when such an amendment is agreed to in writing by all signatories. The amendment will be effective on the date a copy is signed by all parties.

#### **Confidentiality**

It is agreed that by virtue of entering into this MOU they will have access to certain confidential information regarding the other party's operations related to this project. It is further agreed that the parties will not at any time disclose confidential information and/or material without the consent of that party unless such disclosure is authorized by this MOU or required by law. Unauthorized disclosure of confidential information shall be considered a material breach of this MOU. Where appropriate, client


**Nondiscrimination**

There shall be no discrimination of any person or group of persons on account of race, color, creed, religion, sex, marital status, sexual orientation, age, handicap, ancestry, or national origin in the operation of the project.

**Signatories:**

Dane County Veterans Service Office

Movin' Out, Inc.

By: \_\_\_\_\_

By: \_\_\_\_\_

Date: 6/20/2019\_\_\_\_\_

Date: 6-26-19\_\_\_\_\_

Name: DANIEL A. CONNERLY

Name: Kathryn Auerback

Title: VETERANS SERVICE DIRECTOR

Title: Executive Director

## Programs and Services

The following list describes the programs and services that the Dane County Veterans Service Office can help provide for veterans. For more information on programs or services, call (608) 266-4158 or come to one of our locations (<http://www.danevets.com/locations.aspx>).

For help with finding employment, see our Jobs for Veterans ([jobs.aspx](#)) section.

### Recently Discharged Veterans

- Recording DD-214's – Contact staff at the Dane County Veterans Service Office ([contact.aspx](#))
- VA Health Care Enrollment/Dental Care Enrollment (<http://www.va.gov/healthbenefits/apply/>)
- SGLI conversion (<https://insurance.va.gov/sglisite/SGLI/SGLI.htm>)
- Establish Eligibility for State of WI Benefits ([http://www.dva.state.wi.us/Ben\\_eligibility.asp](http://www.dva.state.wi.us/Ben_eligibility.asp))
- eBenefits (<https://www.ebenefits.va.gov/ebenefits-portal/ebenefits.portal>)

### Education Benefits

- Montgomery GI Bill ([http://www.gibill.va.gov/benefits/montgomery\\_gibill/index.html](http://www.gibill.va.gov/benefits/montgomery_gibill/index.html))
- Post- 9/11 GI Bill ([http://www.gibill.va.gov/benefits/post\\_911\\_gibill/index.html](http://www.gibill.va.gov/benefits/post_911_gibill/index.html))
- Job Retraining Grant (<http://www.dva.state.wi.us/Ben-RetrainingGrants.asp>)
- VetEd ([http://www.dva.state.wi.us/Ben\\_VetEd.asp](http://www.dva.state.wi.us/Ben_VetEd.asp))
- Wisconsin GI Bill ([http://www.dva.state.wi.us/Ben\\_education.asp#WIGI](http://www.dva.state.wi.us/Ben_education.asp#WIGI))

### Health Benefits

- My HealtheVet (<http://www.myhealth.va.gov/index.html>)
- **VA Medical Care**
- Assistance to Needy Veterans ([http://www.dva.state.wi.us/Ben\\_emergencygrants.asp](http://www.dva.state.wi.us/Ben_emergencygrants.asp))
- TRICARE (<http://tricare.mil/mybenefit/home>)
- CHAMPVA (<http://www.va.gov/hac/forbeneficiaries/champva/champva.asp>)

### Financial Assistance

- For Information on Financial Assistance for Local Veterans, please contact the Dane County Veterans Service Office ([contact.aspx](#))

### Seniors

### Disabled Vets

- Compensation Claims ([https://www.ebenefits.va.gov/ebenefits-portal/ebenefits.portal?\\_nfpb=true&\\_portlet.async=false&\\_pageLabel=ebenefits\\_mye](https://www.ebenefits.va.gov/ebenefits-portal/ebenefits.portal?_nfpb=true&_portlet.async=false&_pageLabel=ebenefits_mye))
- Filing Appeals (<http://www.bva.va.gov/docs/Pamphlets/010202A.pdf>)
- VA Non Service-Connected Pension (<http://www.vba.va.gov/bln/21/pension/index.htm>)
- VA Vocational Rehabilitation & Employment Program (<http://www.vba.va.gov/bln/vre/>)
- VOW to Hire Heroes Act (<http://benefits.va.gov/VOW/index.htm>)

### Home Buying

- VA Guaranteed Loans (<http://www.benefits.va.gov/homeloans/>)

### In Time of Death

- Dependency & Indemnity Compensation (<http://www.vba.va.gov/bln/21/pension/spousepen.htm#9>)
- Death Pension (<http://www.vba.va.gov/bln/21/pension/spousepen.htm#1>)
- Burial Allowance (<http://www.vba.va.gov/VBA/benefits/factsheets/burials/Burial>)
- Burial Markers ([http://www.cem.va.gov/hm\\_hm.asp](http://www.cem.va.gov/hm_hm.asp))
- Survivors Benefits (<http://www.vba.va.gov/Survivors/>)
- Burial Flag (<http://www.cem.va.gov/cem/bbene/bflags.asp>)
- Government Life Insurance (<https://insurance.va.gov/miscellaneous/index.htm>)
- Presidential Memorial Certificate (<http://www.cem.va.gov/cem/pmc.asp>)
- Flagholders – Contact staff at the Dane County Veterans Service Office ([contact.aspx](#))
- **Burial Information/Assistance with:**
  - State of Wisconsin Cemeteries (<http://www.dva.state.wi.us/Cemeteries.asp>)
  - Forest Hill Cemetery (Soldier Section) ([http://www.cem.va.gov/CEM/cems/lots/forest\\_hill.asp](http://www.cem.va.gov/CEM/cems/lots/forest_hill.asp))

### Other Services

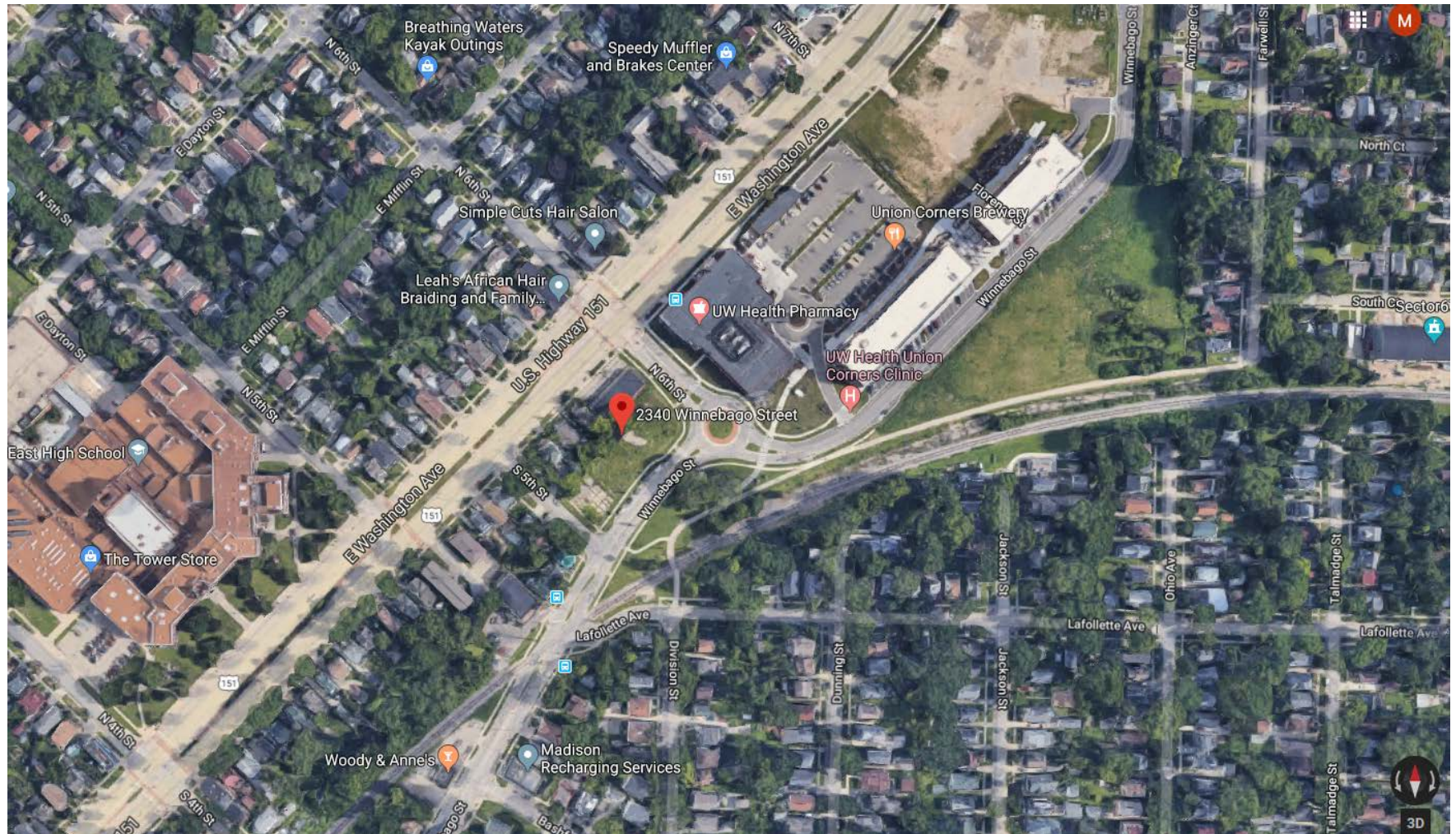
- Veterans Home at King and Union Grove  
(<http://www.dva.state.wi.us/Homes.asp>)
- VA Non Service-Connected Pension with Aid & Attendance  
(<http://www.vba.va.gov/bln/21/Pension/vetpen.htm#9>)
- For information on the following services, please contact staff at the Dane County Veterans Service Office ([contact.aspx](#))
  - Obtaining military awards
  - Obtaining military records
  - Providing grave-care payments
  - Speaking to organizations
  - Home and hospital visits
  - Outreach to prisoners
  - Pre-death advisement
  - Grave registrations
  - Liaison among vets groups
  - VAP – Veterans Assistance Program for homeless veterans
  - Vets Ride with Pride  
(<http://www.danevets.com/documents/pdf/RideWithPride>  
(commuter program))
  - Veterans Treatment Court  
(<https://www.countyofdane.com/court/alternative/veteran>)

#### More Information

- US Department of Veterans Affairs – Benefits Information  
(<http://www.vba.va.gov/VBA/benefits/factsheets/index.asp>)
- Wisconsin Department of Veterans Affairs  
(<http://dva.state.wi.us/default.asp>)

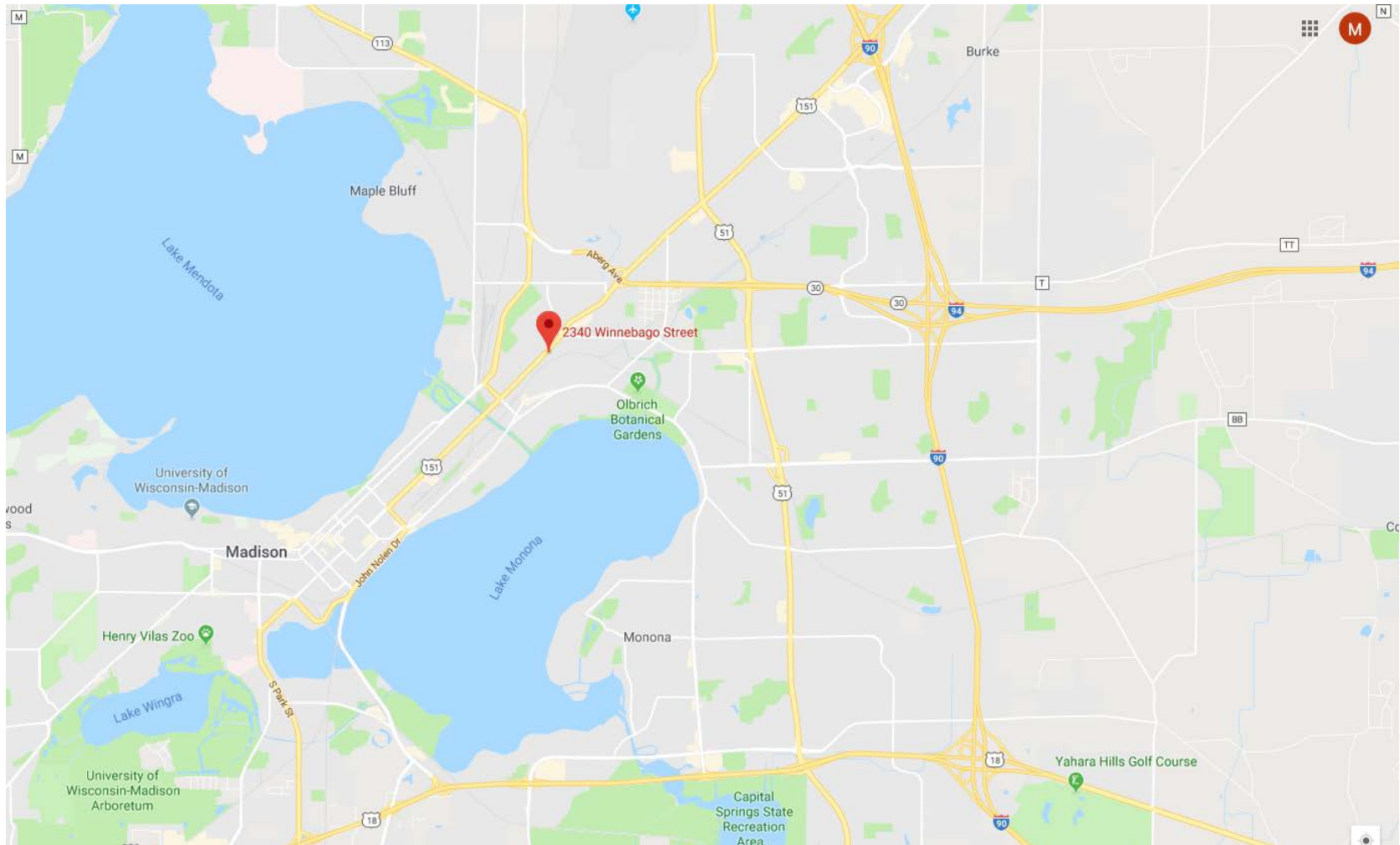


## Site Map – Red Caboose Apartments 2430 Winnebago Street

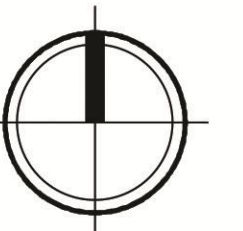
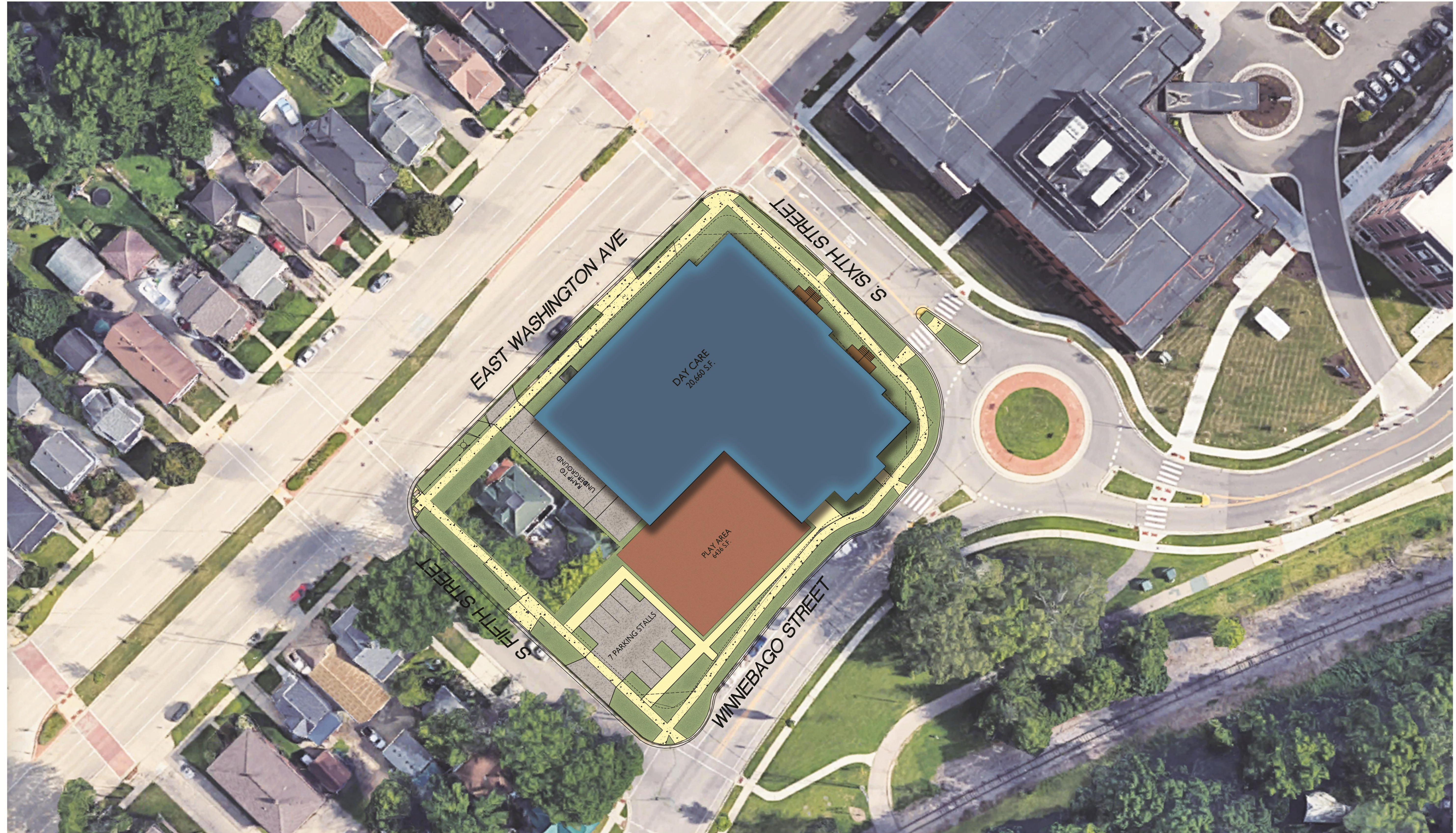




## Site Map – Red Caboose Apartments 2430 Winnebago Street







Red Cabose - Movin' Out  
Site Plan  
June 12, 2019





**ATTACHMENT D****DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION**

Proposers are hereby notified that all information submitted in response to this RFP may be made available for public inspection according to public records laws of the State of Wisconsin or other applicable public record laws. Therefore, proposers are encouraged to refrain from submitting information that cannot be open for public inspection. However, if proposers must include information deemed confidential and proprietary by the proposer, proposer must comply with these instructions:

- Requests for confidentiality must be submitted prior to the proposal submission date to the City of Madison Purchasing Office.
- Requests for confidentiality must use this designated form. Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The City considers other markings of confidential in the bid/proposal document to be insufficient.
- Any information to be considered confidential or proprietary must be separated and packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is not acceptable.

Prices always become public information when bids/proposals are opened or when negotiations have been completed and the contract has been awarded. Other information usually cannot be kept confidential unless it involves a trade secret as defined in S.134.90(1)(c), Wis. Stats. Any information that will be included in any resulting contract cannot be considered confidential. A proposal, in its entirety, will not be considered confidential and/or proprietary.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

In the event the designation of confidentiality of this information is challenged, the undersigned hereby agrees to provide legal counsel or other necessary assistance to defend the designation of confidentiality and agrees to hold the City of Madison harmless for any costs or damages arising out of the City's agreeing to withhold the materials.

The attached material submitted in response to Bid/Proposal # \_\_\_\_\_ includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released:

Section	Page No.	Topic	Specific law that supports confidentiality of information

Company Name Movin' Out, Inc.

Enter Name: Kathryne Auerback

By entering your initials  
in the box,

KA

You are electronically signing your  
name and agreeing to the terms above.

Date: 6/26/19

**Movin' Out, Inc.**  
**Red Caboose Apartments**

**Response Submission Due Date: August 8, 2019 NOON**

---

**Instructions to Applicants:**

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

**Questions:**

**Land Use**

- 1. Please describe the current development plan, specifically noting whether there will be ground floor units or just ground floor access, as depicted in earlier concepts.**

The units will have ground floor entries as required by WHEDA for the Serves Large Families points. Those entries will lead to a private stair to the 2<sup>nd</sup> floor unit. This allows Red Caboose to have all required space on one floor. It should be noted that units will also have interior entrances that will be accessed from the 2<sup>nd</sup> floor hall.

- 2. The application states that Movin' Out is working with Red Caboose to identify access for apartment residents to the large onsite playground after hours/weekends. Please provide an update on how this feature will be shared and describe other on-site open space features to serve the residents.**

This continues to be in discussion. Red Caboose has been working with their insurance provider who has some concerns about the space being shared. They have indicated that insurance for childcare centers can be difficult to place so they need to be careful that their coverage is affected. We are also programming open space on the 2<sup>nd</sup> floor roof deck. In addition, the site is across the street from a City-owned green space. The space is also partially owned by the GrandFamily development and we are working with the Alder and neighborhood to identify ways to make that space available for the neighborhood including our development.

**Unit Mix**

- 1. Please clarify the discrepancy in the responses to Questions 40 and 47, which indicate the Internet will be provided to residents at no cost. The final sentence in the response to Question 40 also states: "Right now, we are anticipating a cost of \$30 per unit per month..."**

This is accurate. The service will be provided to the resident at no cost. We have underwritten operating expenses for the project to account for the additional cost of

providing this service. We are estimating that this would cost the project \$30/unit/month.

- 2. Are the market-rate units truly market-rate (i.e., no income or rent restriction) or will those be AHP units as well, therefore income-restricted to at or below 80% CMI units.**

Yes, the market rate units are not income restricted. It should be noted that WHEDA no longer allows 80% units to count as market rate for scoring purposes.

#### **Supportive Housing Units/Supportive Housing Partnerships**

- 1. Please answer Question 12: Identify the sources of non-City provided funding contemplated for supportive services. Specifically, please elaborate on the “variety of federal, state, and local resources” that will ensure that services provided by each of the non-profit partners identified (Care Wisconsin and The Road Home) will be available to qualifying residents well into the future.**

The project is allocating \$10,000 annually to fund Movin’ Out’s Community Impact Program. The remaining services in our MOU’s will not have a cost to the project. The various service providers we have partnered with each have their own funding streams which come from various federal, state, and local resources. Their programming will be funded outside of the Red Caboose Apartments project. The partners that we have executed MOU’s with are firms that have been around for many years and have extensive experience in providing services to their targeted population. Movin’ Out’s role will be to ensure that these services are available. Should they lose funding for some reason, Movin’ Out would work to establish a new MOU with a provider for that same targeted population. Again, this would be at no cost to the project.

- 2. With the “Movin’ Out Supportive Services” payment in the pro forma, will you be increasing the hours of the staff to support the Community Impact Program and/or using this annual payment to support an additional staff person to serve this location?**

The annual budget allocation allows the Community Impact Program to be provided at a more time intensive level with dedicated time weekly for the Red Caboose Apartments. As Movin’ Out continues to build its portfolio we will adjust staffing as needed to ensure each of our developments is being appropriately served by the Community Impact Program. With multiple developments in the Madison area our staff will be able to realize some economies of scale in providing these services.

- 3. For the four units targeted to homeless families, will Movin’ Out use the Continuum of Care’s By-Name Priority List to fill those specific units?**

Yes. We will look to The Road Home to help coordinate that process together with us. We will together identify criteria (i.e. households where one family member has a disability) that will be applied to the Priority List in order to identify the household that

best qualifies in terms of household need. The Road Home and Movin' Out will also work together with the property management firm to ensure that screening criteria are established taking into consideration varying circumstances of families experiencing homelessness.

## **Feasibility**

- 1. How will Movin' Out protect future tenants from rapidly rising contract rents allowed by WHEDA? Will you have any internal structures to limit rent increases for lease renewals?**

Our third-party management company, ACC Management, limits rent increases on renewals to the lower of 5% or \$50. This is dependent on the County CMI increases. In addition, all budgets and rents will be approved by ownership as part of the annual budget process so Movin' Out will have the opportunity to limit rents if we choose in order to limit the impact on residents while still ensuring our financial model is achievable.

- 2. When will you know if you will get a commitment for Section 8 PBVs or Section 811 PRA? Why apply this rental assistance to the 30% units? How will the loss of assumed higher rents be mitigated if rent assistance is not obtained?**

We will know about the commitment of Section 8 Project-Based vouchers prior to our WHEDA application in December. We do have a current award of vouchers from the Dane County that we are currently determining if it is still in place. If not, we are also waiting to hear back from DCHA on timing of an RFP for 2019. Section 811 rental assistance would also be an option but cannot be applied for until the project is within a year of lease-up. We were recently awarded the second award of Section 811 vouchers by WHEDA and feel we are uniquely qualified to secure awards in the future. Our service plans with local service providers for individuals with disabilities is a key component successfully implementing and 811 program.

- 3. Specifically, to what green building/Net Zero construction project component(s) does the \$75,000 figure pertain (e.g., solar array, graywater system, etc.)? The application indicates a "focus on increasing sustainability and energy efficiency," however, little detail is provided. Please provide an update as to actual plans moving forward.**

The project will be built to Wisconsin Green Built Home Standard achieving more than 150 points. Items include: windows with a U value of less than 0.35; 95% or higher efficiency furnaces; Energy Star appliances; low-flow water faucets, showers, and toilets; and high efficiency hot water heaters.

We are also anticipating the inclusion of a solar PV system at Red Caboose Apartments. We have already met with GS Solar to begin the design process and better understand the solar capacity of the building. Solar-ready specs are already included in the initial

design. Initial cost estimates put this system at a minimum of \$145,000. We have applied to Dane County for an additional \$50,000 in their Affordable Housing Development Fund to help address the cost. The \$75,000 we noted in the application is likely lower than what we will ultimately spend on green building items.

- 4. Please explain the proposal's conservative approach to raising only \$0.88 per tax credit for this project. We have reliably seen projects close with tax credit pricing at or above \$0.90 per LIHTC over the last two years.**

Due to the project's small size we have been conservative in our underwriting assumptions but still underwrote this project within the range provided by WHEDA for the 2019 funding round. With a smaller project size and the addition of the added complexity in working with Red Caboose Childcare, it was important for us to allow for this lower pricing. We did reach out to Baker Tilly as part of the underwriting process as well. They indicated that, "Syndicator internal due diligence costs the same for a deal with \$1MM of annual credits compared to a project with \$500,000 of annual credits. This accounts for around 1 penny less of pricing for the smaller deal. Also, the direct investors are interested in the larger deals, so a project with \$500,000 of credits is more likely to be in a multi-investor fund, which has a higher yield requirement than a direct investor, leading to a little lower pricing."

- 5. Please explain the rationale for budgeting over \$232,000 for demolition for the three structures.**

This project assumes the demolition of two single-family homes as well as the old sales center site. Demolition includes disassembling any salvageable items and then removing and disposing of the existing buildings and foundations. Demolition may also include abatement and site restoration to bring the site back to grade. With budgeting early in the process, we need to account for possible site conditions that are not yet known. This is true of many line items in the construction budget. On a smaller deal we prefer to take a conservative approach to the budget to ensure we have adequate funding available.

- 6. Please confirm that ACC Management will not charge a pet fee/pet rent for service animals and certified Emotional Support Animals.**

Red Caboose Apartments will not charge for service animals or certified Emotional Support Animals. ACC Management has confirmed this as well.

#### **Other**

- 1. Regarding Question 25, which specific route(s) would students take to get to their elementary and middle schools (i.e. would there be a yellow bus or, if not, which Metro route serves those schools from your site?)?**

MMSD only provides transportation for elementary students that live more than 1.5 miles walking distance from school. This was confirmed with Kristian Chavira. He also indicated that most elementary and middle school children that are within this distance walk or are dropped off by parents.

Lowell Elementary is within that distance so children would walk to school or be dropped off by parents. If they chose to ride a Madison Metro bus they would be picked up across 6<sup>th</sup> Street and ride the 15 bus to Milwaukee & S. Marquette and then walk the remaining ten minutes to Lowell.

O'Keefe Middle School is also within the 1.5 mile distance. Students would walk or be dropped off. If they chose to ride a Madison Metro bus they would walk to Winnebago and LaFollette to take the 10 bus to Winnebago and Riverside. They would then walk the remaining 3 minutes to O'Keefe.

**2. Please expand on your response to Question 27. Have you consulted with Kristian Chavira at MMSD, and if so please provide the projected impact on school enrollment? Note that children at this development will attend Lowell Elementary School.**

We have talked to Kristian Chavira. He confirmed that due to the small project size he does not anticipate an impact on school enrollment. He further confirmed that most children are likely to come from the neighborhood and are likely to already be enrolled in the school. This was tracked as Carbon was built across this street and, even with 90 units, there was little impact to enrollment for this same reason. The email from Kristina is provided below.

Good morning Megan:

Thank you for sending the information regarding the proposed development.

Using the student generation rates from the [Student Enrollment Projections report](#) the proposed development would yield approximately two new MMSD students.

The method is:

1. 4-story Multi-family Building in an Urban Area (typology = T): Total Students per a Unit = 0.053
2. 38 units \* 0.053 students/unit = 2 students

This is most likely an underestimate given the the purpose of the building. This is our standard method we apply to all development projects.

The schools serving this property are Lowel ES (86% of capacity during 2018-2019), O'Keeffe MS (47%), and East HS (60%); all of which have sufficient space to accommodate an increase in students with there being a substantial effect on room use and programming.

-- see [Fall 2019 Enrollment report](#)

Please let me know if you require additional information.

Kristian Chavira, Data Analyst  
Research & Program Evaluation Office  
Department of Research, Accountability, & Data Use  
Madison Metropolitan School District  
Room 205, Doyle Administration Building  
[kachavira@madison.k12.wi.us](mailto:kachavira@madison.k12.wi.us)  
(608)442-2920



3. **The application references a second neighborhood meeting in late July. Did this occur? If so, please provide a summary of the comments. If not, please provide an update on the plan.**

Yes, another neighborhood meeting was held on July 25<sup>th</sup> at Bashford United Methodist Church. We had approximately 5-10 neighbors in attendance and provided an update on the plans including what was submitted to the City earlier in July. Below are some bullet point comments on what comments were made.

- Neighbors asked about entrances and exits to gain a better understanding of traffic flow. They were interested in knowing about how drop off and pick up will work for the childcare center.
- They also asked for more details on how affordable housing works and rent ranges.
- They provided comments on the design and aesthetics with a very favorable response.
- A neighbor asked if solar was going to be incorporated.